PropertyCare CRM Project

Phase 1: Problem Understanding & Industry Analysis

1.Requirement Gathering

- Engage with key stakeholders such as the Real Estate CEO, Sales Agents, Property Managers, and Prospective Buyers to identify core needs.

- The system requirements include:
  - Automate lead capture from website/social media.
  - Track property inventory with price, location, and status.
  - Allow scheduling and tracking of property visits.
  - Generate sales funnel reports and revenue dashboards.

2. Stakeholder Analysis

- Admin – Setup & configuration.
- Sales Agents – Manage leads, visits, and deals.
- Property Manager – Manage property listings.
- Manager/CEO – Monitor dashboards, approvals.
- Customers – Receive visit confirmations.

3. Business Process Mapping

- Flow Example:
  Customer Inquiry → Lead Captured → Lead Qualification → Assigned to Agent → Visit Scheduled → Property Manager Updates Availability → Manager Reviews → Deal Closed → Dashboard Updated

4. Industry-specific Use Case Analysis

- Real Estate industry requires handling large volumes of inquiries, high-value deals, and accurate property availability.
- Lead qualification and scoring.
- Visit scheduling with notifications.
- Tracking buyer preferences and purchase history.
- Dashboards for sales performance and revenue trends.

5. AppExchange Exploration

- Search for "Real Estate CRM" apps. Some apps exist, but to learn and build end-to-end, we'll develop a tailored solution with PropertyCare CRM.