

# Project Plan: Milestone Homes Real Estate AI Automation

Client: Milestone Homes Real Estate (Dubai)

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Project Goal: Implement AI automation to improve lead qualification and customer service.

Scope:

- Phase 1: Lead Qualification with AI
  - Integrate with Milestone Homes' CRM to ingest 3rd party lead data.
  - Develop AI automation to send emails and WhatsApp messages for lead qualification.
  - Define positive responses for lead activity and update CRM accordingly.
  - Integrate with CRM to update lead status (active/dead).
  - Develop a custom API to integrate with Milestone Homes' CRM for data exchange.
- Phase 2: AI Chatbot for Lead Inquiries
  - Design and develop an AI chatbot for Milestone Homes' website and WhatsApp.
  - Train the chatbot to answer common customer inquiries.
  - Integrate the chatbot with the CRM for lead capture and qualification.

Deliverables:

- Phase 1: Functional lead qualification system with AI automation.
- Phase 2: Deployed AI chatbot for website and WhatsApp.

Project Schedule:

- Phase 1: (Estimated duration - 4 weeks) \$9k
  - Week 1: Requirement gathering, API integration setup with CRM.
  - Week 2: Develop and test AI lead qualification logic.
  - Week 3: Develop & integrate WhatsApp & Email functionalities.
  - Week 4: User Acceptance Testing (UAT) and deployment.
- Phase 2: (Estimated duration - 6 weeks) \$5k
  - Week 1: Chatbot design, user stories development.
  - Week 2-3: Chatbot conversation flow & knowledge base creation.
  - Week 4-5: Chatbot training and integration with CRM & messaging platforms.
  - Week 6: UAT and deployment.

(These are estimates and may be adjusted based on complexity.)

Resources:

- Project Manager
- Developer

#### Risks & Mitigation:

- Data Quality: Inaccurate 3rd party data may affect lead qualification. We'll implement data validation checks and allow for manual review of flagged leads.
- AI Chatbot Training: Time required to train the chatbot effectively. Start with a core set of FAQs and iteratively improve based on user interaction.
- Integration with CRM: Potential compatibility issues. Thorough testing with the Milestone Homes IT team before deployment.

#### Additional Considerations:

- Lead Scoring: While not included in this initial scope, lead scoring logic can be integrated at a later stage.
- AI Training Data: Milestone Homes may need to provide additional customer data for chatbot training.
- Security & Privacy: Ensure compliance with data privacy regulations when handling customer information.

#### What We Need From The Client

##### Phase 1: Lead Qualification with AI

- Data Structure: We need a sample of the data structure you receive from the 3rd party source. In simpler terms, what information do you get about each potential customer (e.g., email address, phone number, other relevant details)?
- Defining Positive Responses: We need to work together to define what constitutes a positive response from a lead. This will help the AI identify active leads. Examples could be clicking a link in the email, replying positively to the WhatsApp message, or scheduling a call.

##### Phase 2: AI Chatbot for Lead Inquiries

- Customer Qualification Questions: Please provide a list of questions you typically ask customers to understand their needs and offer the right recommendations. These could include:
  - What's your budget?
  - How soon are you looking to buy?
  - Is this an investment property or for personal use?
- Knowledge Base: The chatbot will need access to a knowledge base to answer customer inquiries effectively. Please advise on where we can find the information to respond to these inquiries. For example, if a customer has a \$1 million budget, is looking to buy within 6 months, and wants a personal property, where would we find information about suitable properties?