## **Initial Project specification**

Contoso Real Estate sells and manages both commercial and residential real estate properties. Customer information is stored in their current Dataverse instance.

Bookings previously could only be requested over the phone, causing the Contoso phone line to always be busy. Despite their importance, many customers couldn't get through to the office to request their services. Long wait times could mean customers get frustrated and hang up. This frustration can result in loss of business for Contoso.

The seller is in a discovery call and they want to qualify the opportunity and envision with the Real Estate company. They pitch them on an AI app where customers discover information about the real estate booking process, and creates booking requests for the office to review.

A well-built agent provides customers with the ability to submit their booking request information in their own time, reducing the time waiting on the phone. Happy customers are likely to share their experience with others and increase business for Contoso Real Estate.

* Contoso Real Estate would like the Bookings to be done in a Mobile App or from a website so that customers and Real Estate sales reps can do data entry
* The database and the Apps will be supplied by a Consultant who gives you the files to install them. They will also provide some sample data for you to train new employees
* You will also be given the database stored in the Dataverse (a special database for Low Code Apps). You can use these as a starting point for the Custom Copilot

**Non-technical case study:**

**Customer Background:**

Contoso Real Estate is a company that sells and manages both **commercial** and **residential properties**. They store customer information in a system called **Dataverse**. Right now, customers can only request bookings **over the phone**, which has created a lot of problems. The phone line is almost always busy, leading to **long wait times** for customers, and many end up frustrated and hang up. This results in **missed business** and **lost opportunities** for Contoso.

Contoso is looking for a solution to make their booking process easier for customers, and to help their team handle bookings more efficiently.

**Business Needs:**

1. **Digital Booking:** Contoso wants to offer customers a way to **book services online**, either through a **mobile app** or a **website**. This would allow customers to book without needing to call, and would make it easier for sales reps to follow up and manage these requests.
2. **Self-Service for Customers:** Customers should be able to learn about the booking process and **submit booking requests on their own**, without waiting on the phone. This would make the process faster and more convenient for everyone.
3. **Ease of Data Entry:** Contoso wants both **customers** and **sales reps** to easily enter and manage booking details. The goal is to reduce mistakes and make the whole process faster.
4. **Integration with Current System:** The new system should work well with the **Dataverse** system where Contoso’s customer data is stored, so they don’t need to start from scratch.

**Challenges and Concerns:**

1. **Time Pressure:** The **Business Decision Maker (BDM)** at Contoso is under a lot of pressure to **move quickly**. Competitors are offering faster and easier booking systems, and Contoso needs a solution that can be implemented quickly to stay competitive.
2. **Disruption to Business:** Contoso is worried about how a new system might disrupt their current processes. They don’t want to make changes that will cause confusion or slow things down for their team.
3. **Customer Resistance:** Some customers may not be comfortable using new technology, especially if they’re used to booking by phone. Contoso needs a solution that will be **easy for everyone** to use, even for less tech-savvy customers.
4. **Data Security:** Contoso needs to be sure that any new system will **protect customer data** and meet all privacy and security requirements.
5. **Integration with Current Tools:** Contoso already uses **Dataverse** to store customer information. Any new solution needs to work smoothly with this system without causing extra work for their team.
6. **Competitive Pressure:** Contoso is worried that if they don’t act fast, competitors will get ahead in terms of offering **better, faster customer service**, and they may lose customers to them.
7. **Cost and ROI:** Contoso wants to make sure that any solution they invest in will offer a **good return on investment (ROI)**. They need to be confident that the new system will help them increase bookings, improve customer satisfaction, and streamline operations.

**Goals and Expectations:**

* **Efficiency:** The new system should **reduce wait times** and make the booking process faster for customers and easier for sales reps to manage.
* **Better Customer Experience:** Contoso wants customers to have a **smooth and easy experience**, so they can book quickly without frustration. Happy customers are more likely to book again and recommend Contoso to others.
* **Stay Competitive:** Contoso needs a solution that will help them **compete with faster, more user-friendly services** offered by their competitors.
* **Scalability:** The solution should be **flexible and able to grow** with the company as their business expands and customer demands increase.

**Summary:**

Contoso Real Estate needs a **faster, easier booking system** for their customers and sales team. The company faces challenges like pressure to move quickly, fear of disrupting their current operations, and concerns about customer adoption. They want a solution that **works well with their current system**, protects customer data, and offers a **quick ROI** by improving customer satisfaction and efficiency.