

Smart Property Portal – Real Estate Customer Engagement & Lead Conversion

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

To ensure the solution fits business needs, inputs are collected from all key stakeholders.

Example Requirements: - Track all properties with availability status. - Allow leads to inquire about properties directly through the system. - Automate customer engagement (emails, reminders, follow-ups). - Convert leads into opportunities and track their status. - Generate lead conversion and performance reports.

2. Stakeholder Analysis

Key Stakeholders and Roles: - **Admin:** Manages system setup, configurations, and user roles. - **Real Estate Agents:** Capture and manage leads, update property details, schedule property viewings. - **Manager:** Approves deals, monitors agent performance, reviews reports. - **Marketing Team:** Runs campaigns to generate leads, track campaign performance. - **Customer Support:** Handles customer inquiries, resolves issues, ensures smooth communication.

3. Business Process Mapping

Lead-to-Deal Flow: 1. Lead submits inquiry about a property. 2. Agent checks property availability in the system. 3. Engagement initiated via automated messages and follow-ups. 4. Agent schedules property viewing with the lead. 5. Lead makes an offer. 6. Offer is reviewed, approved, and converted to a deal.

4. Industry-specific Use Case Analysis

In the real estate sector, properties and leads require detailed tracking due to: - **Unique Property Attributes:** Location, size, amenities, and documentation. - **Price Variations:** Fluctuating market prices that impact deals. - **Legal Checks:** Verification of property documents before closing. - **Engagement Needs:** Timely communication, personalized updates, reminders. - **Funnel Analysis:** Understanding where leads drop off in the conversion process.

System Needs: - Maintain property listings with detailed metadata. - Automate engagement workflows (reminders, offers, follow-ups). - Notify leads instantly about updates or availability. - Provide analytics dashboards for conversion funnel tracking.

5. AppExchange Exploration

While Salesforce AppExchange has several apps for **Real Estate** and **Property Management**, this project will focus on creating a **simplified custom solution** that: - Covers essential requirements (lead

management, property tracking, engagement automation). - Provides flexibility for future expansion. - Serves as a learning opportunity by building core functionality from scratch.