# Salesforce Project: Smart Property Portal – Real Estate Customer Engagement & Lead Conversion

## Phase 10: Final Presentation & Demo Day

⬜ Goal: Wrap up the project with a professional delivery, demonstration, and documentation.

### 1. Pitch Presentation

• Clearly present the Problem → Solution → Benefits.

• Highlight real estate challenges: customer engagement, property tracking, and lead conversion.

• Showcase how Salesforce Smart Property Portal solves these issues with automation, dashboards, and streamlined lead management.

### 2. Demo Walkthrough

• Step 1: Create a new property listing in Salesforce.

• Step 2: Log a customer inquiry as a Lead.

• Step 3: Convert the Lead into an Opportunity and link it with a Property.

• Step 4: Show automated approval flow for high-value property deals.

• Step 5: Demonstrate email/SMS notification sent to the customer.

• Step 6: Display reporting dashboard – e.g., Revenue by Property Type, Agent Performance.

• Step 7: End with customer engagement insights and security measures implemented.

### 3. Handoff Documentation

• Provide a System Design Document detailing custom objects, fields, automation, and integrations.

• Deliver a User Guide with step-by-step instructions for agents, managers, and admins.

• Provide a Data Migration and Security Policy document.

• Include deployment and maintenance guidelines for IT support teams.

### 4. Project Showcase

• Add project details to LinkedIn and portfolio.

• Highlight Salesforce modules implemented: Sales Cloud, Reports & Dashboards, Flows, and Integrations.

• Record a demo video showing key features of the Smart Property Portal.

• Mention customer engagement benefits, improved lead conversion rate, and enhanced reporting transparency.