# Site Visit Coordination

Site visits are a crucial step in the property buying process. Effective coordination ensures a seamless experience for potential buyers, increasing the chances of conversion.

### **1. Automate Site Visit Booking via WhatsApp & Website**

* **Purpose:**
  + Allow potential buyers to book property visits conveniently.
  + Reduce dependency on manual coordination.
  + Improve scheduling efficiency and minimize no-shows.
* **Success Criteria:**
  + High percentage of confirmed appointments.
  + Reduction in scheduling conflicts.
  + Increased site visit attendance rate.
* **Skills Required:**
  + Chatbot and API integration.
  + Scheduling automation.
  + CRM connectivity.
* **Related Online Tools:**
  + **Calendly / Microsoft Bookings** – For appointment scheduling.
  + **Wati / Twilio WhatsApp API** – For automated WhatsApp booking.
  + **Google Calendar / Outlook Integration** – For real-time scheduling.
* **Best Practices:**
  + Offer multiple time slots for flexibility.
  + Send automated confirmation & reminder messages.
  + Allow **rescheduling options** via WhatsApp or email.
* **Example:**
  + **Before:** Buyers had to call an agent to book a visit, leading to delays.
  + **After:** A WhatsApp bot **allows instant scheduling**, reducing coordination time.

### **2. Assign Sales Agents & Notify Them in Real-Time**

* **Purpose:**
  + Ensure every booked site visit is assigned to an available agent.
  + Prevent overbooking or mismanagement of site visits.
  + Improve buyer experience with prompt attention.
* **Success Criteria:**
  + Faster agent response times.
  + Fewer missed or double-booked appointments.
  + Improved agent accountability and efficiency.
* **Skills Required:**
  + CRM workflow automation.
  + Internal team communication tools.
  + Agent availability tracking.
* **Related Online Tools:**
  + **HubSpot / Zoho CRM** – For lead and appointment tracking.
  + **Slack / Microsoft Teams** – For instant agent notifications.
  + **Zapier / Make.com** – For automation between booking and agent notifications.
* **Best Practices:**
  + Assign site visits based on agent availability and expertise.
  + Notify sales teams via **email, WhatsApp, or internal dashboards**.
  + Ensure backup agents in case of cancellations.
* **Example:**
  + **Before:** An agent misses a scheduled visit due to a lack of notification.
  + **After:** **Automated agent assignment** ensures the next available agent is alerted immediately.

### **3. Provide Google Maps Location & Navigation Assistance**

* **Purpose:**
  + Ensure buyers easily find the property location.
  + Reduce last-minute cancellations due to location confusion.
  + Improve buyer experience with seamless navigation.
* **Success Criteria:**
  + Fewer cases of lost visitors.
  + Higher attendance rate for site visits.
  + Increased buyer satisfaction.
* **Skills Required:**
  + Google Maps integration.
  + Location-based service automation.
  + Real-time navigation assistance.
* **Related Online Tools:**
  + **Google Maps API / Waze Integration** – For real-time directions.
  + **WhatsApp / SMS Autoresponders** – For location sharing.
  + **Property Website GPS Integration** – To display directions.
* **Best Practices:**
  + Auto-send Google Maps location via **WhatsApp or SMS** before the visit.
  + Provide **landmark-based directions** for easy navigation.
  + Offer **parking details and nearby transport options**.
* **Example:**
  + **Before:** Buyers struggle to find the site, leading to late arrivals or cancellations.
  + **After:** A **pre-visit WhatsApp message** sends accurate GPS directions, improving punctuality.

### **4. Send Automated Reminders & Follow-Ups Before Site Visit**

* **Purpose:**
  + Reduce the number of no-shows.
  + Keep potential buyers engaged before their visit.
  + Provide any last-minute details for a smoother visit experience.
* **Success Criteria:**
  + Higher site visit attendance rate.
  + Reduced last-minute cancellations.
  + More engaged and well-prepared buyers.
* **Skills Required:**
  + SMS & WhatsApp automation.
  + Email marketing sequences.
  + CRM-based workflow management.
* **Related Online Tools:**
  + **Twilio / WhatsApp Business API** – For automated messaging.
  + **Mailchimp / ActiveCampaign** – For email reminders.
  + **HubSpot CRM / Zoho CRM** – For tracking follow-ups.
* **Best Practices:**
  + Send **confirmation messages** right after booking.
  + Schedule **reminders 24 hours & 1 hour before the visit**.
  + Provide an option to **reschedule if needed**.
* **Example:**
  + **Before:** Buyers forget their scheduled site visit, leading to wasted agent time.
  + **After:** **Automated reminders** reduce no-shows by 40%.

### **5. Offer Virtual Site Visits for Remote Buyers**

* **Purpose:**
  + Allow long-distance or international buyers to view the property remotely.
  + Increase engagement with tech-savvy buyers.
  + Expand the market beyond local buyers.
* **Success Criteria:**
  + More remote buyers showing interest in properties.
  + Faster decision-making for out-of-city buyers.
  + High engagement rates for virtual tours.
* **Skills Required:**
  + Video streaming and conferencing setup.
  + Virtual tour creation (360-degree view).
  + Sales pitch adaptation for remote buyers.
* **Related Online Tools:**
  + **Matterport / Kuula** – For 360-degree virtual tours.
  + **Zoom / Google Meet** – For live video walkthroughs.
  + **YouTube / Vimeo** – For hosting recorded property walkthroughs.
* **Best Practices:**
  + Offer **both live and pre-recorded virtual tours**.
  + Use **high-quality 360-degree visuals** for a realistic experience.
  + Provide a sales agent to **guide remote buyers through the tour** in real-time.
* **Example:**
  + **Before:** Out-of-town buyers delay decisions due to travel constraints.
  + **After:** A **live virtual tour with Q&A** helps a remote buyer make a purchase decision faster.

### **6. Collect Post-Visit Feedback & Address Concerns**

* **Purpose:**
  + Understand buyer sentiment after a site visit.
  + Identify and resolve objections before losing a potential sale.
  + Improve the overall site visit experience.
* **Success Criteria:**
  + Higher engagement in post-visit communication.
  + Reduced buyer objections after addressing concerns.
  + Improved future site visit experiences based on feedback.
* **Skills Required:**
  + Survey & feedback collection techniques.
  + Data analysis for improving site visit processes.
  + Objection handling and sales follow-up.
* **Related Online Tools:**
  + **Google Forms / Typeform** – For feedback collection.
  + **WhatsApp Surveys / SMS Polls** – For quick post-visit feedback.
  + **HubSpot / Salesforce CRM** – For tracking post-visit engagement.
* **Best Practices:**
  + Send a **thank-you message** with a feedback form within 24 hours of the visit.
  + Offer a **follow-up call** to address any concerns.
  + Track common objections and provide **personalized solutions**.
* **Example:**
  + **Before:** Sales teams don’t follow up, and buyers lose interest.
  + **After:** Buyers receive a **personalized post-visit WhatsApp message**, leading to a **30% increase in second visits or bookings**.