

Detailed Project Report (DPR)

CRM Workflow for Real Estate Sales

Prepared For: Real Estate Developer (India)

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Phase 1: Lead Intake & Assignment

Objective: Centralize all leads and ensure fair distribution among sales teams.

Key Activities:

- Capture leads from multiple sources: Portals (MagicBricks, 99acres, etc.), Ads (Google, Meta), Brokers/CPs, Website forms, Walk-ins.
- Deduplicate based on mobile/email.
- Auto-store in centralized lead database.

System Actions:

- Apply lead source tagging.
- Assign sales agents by rules (project, location, round-robin).
- Send auto-acknowledgement to customer.

Output: Output: Clean, assigned leads ready for engagement.

Phase 2: Customer Journey Tracking

Objective: Maintain a transparent sales pipeline for every lead.

Key Activities:

- Update lead statuses: New → Contacted → Site Visit → Negotiation → Booking → Sale → Post-Sales.
- Maintain full interaction log (calls, WhatsApp, emails, visits).
- Capture customer preferences and objections.

System Actions:

- Auto-notify sales agents of next action.
- Trigger reminders for pending follow-ups.
- Management visibility into lead progression.

Output: Output: 360° customer journey map.

Phase 3: Inventory Management

Objective: Provide real-time project and unit availability.

Key Activities:

- Define hierarchy: Project → Tower → Floor → Unit.
- Record attributes (size, base rate, view, PLC, GST, Stamp Duty).
- Enable block, book, release with expiry (e.g., 24 hours).

System Actions:

- Dynamic pricing per floor/view.
- Prevent double-booking with lock system.
- Update dashboards with live availability.

Output: Output: Accurate and real-time inventory view.

Phase 4: Negotiation & Booking

Objective: Standardize approvals and automate booking formalities.

Key Activities:

- Record customer offers, special requests, discount asks.
- Trigger manager approval workflow for discounts.
- On token payment, auto-generate unit allotment letter.

System Actions:

- Reserve unit immediately on booking.
- Sync booking status to dashboards and reports.

Output: Output: Faster booking cycle with compliance checks.

Phase 5: Payments & Finance

Objective: Automate collections and reduce payment delays.

Key Activities:

- Generate payment plans: CLP (Construction Linked), TLP (Time Linked), Down Payment.
- Create and send demand notes.
- Track receipts, reconcile with bank statements.

System Actions:

- Send auto-reminders (SMS/WhatsApp/email) for due dates.
- Update outstanding/collections dashboard.
- Restrict further actions if payments overdue.

Output: Output: Healthy cash flow and reduced follow-up burden.

Phase 6: Channel Partner Management

Objective: Streamline broker involvement and payouts.

Key Activities:

- Onboard CPs with KYC and agreements.
- Allow CPs to register their leads in system.
- Track deal progress and payments.
- Auto-calc commission % on realized payments.

System Actions:

- Generate CP performance reports.
- Trigger payout requests for finance team.

Output: Output: Transparent broker ecosystem with timely payouts.

Phase 7: Automation & Communication

Objective: Ensure timely, personalized, and consistent engagement.

Key Activities:

- Create WhatsApp/SMS/Email campaigns for new launches, reminders, offers.
- Trigger site visit reminders.
- Send block expiry alerts to both sales and customer.

System Actions:

- Use integration APIs (Twilio/Gupshup for WhatsApp, SMTP for emails).
- Maintain engagement logs.

- Nurture cold leads via drip campaigns.

Output: Output: Higher engagement, reduced manual workload.

Phase 8: Dashboards & Reports

Objective: Give management real-time actionable insights.

Key Activities:

- Daily MIS (Lead inflow, conversion, collections).
- Sales funnel visualization (per project/tower).
- Collection vs Outstanding report.
- Performance analysis (sales team, CPs).

System Actions:

- Auto-generate scheduled reports (daily/weekly/monthly).
- Interactive dashboards with filters.

Output: Output: Data-driven decision making at all levels.