Momentum

Where Growth Finds Its Flow

Product Management Case Study
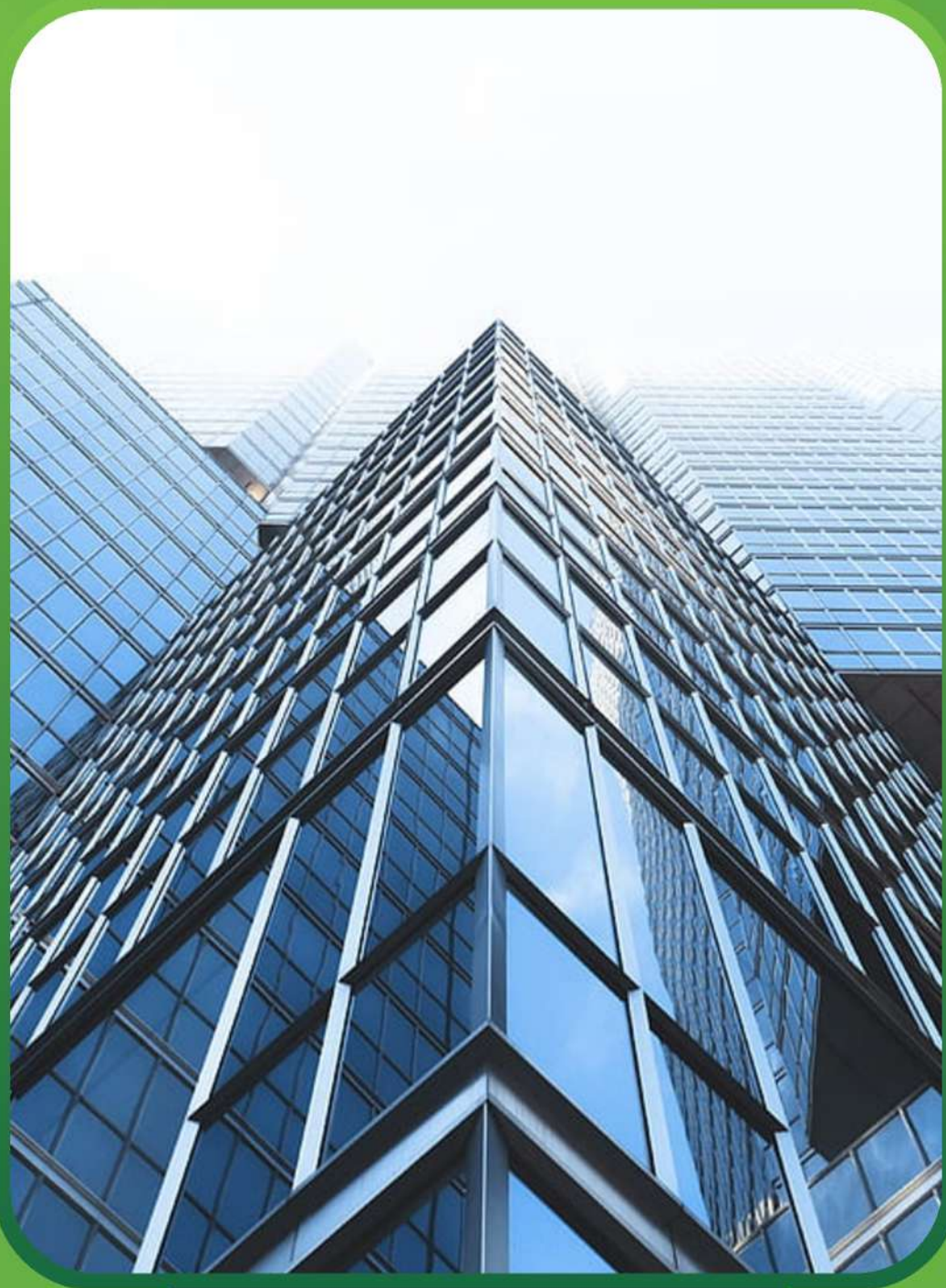
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Technologies Used

→

django

MySQL®

Google Analytics

INTRODUCTION

The real estate industry is highly competitive, where managing leads, tracking sales performance, and coordinating site visits efficiently is crucial for success. However, many real estate businesses, especially small and mid-sized agencies, struggle with fragmented workflows, missed follow-ups, and lack of real-time insights into their sales pipeline.

Existing CRM solutions like Zoho and Salesforce, while powerful, are often too complex, expensive, and not tailored to real estate-specific needs. These platforms fail to address the core challenges faced by business owners and sales teams, such as:

Inefficient lead tracking leading to lost sales opportunities.

Lack of sales visibility and real-time performance monitoring.

Manual and unstructured site visit coordination, causing delays and mismanagement.

To bridge this gap, we introduce Momentum CRM, a sales-focused CRM built specifically for real estate businesses to optimize their lead-to-sales process, improve performance tracking, and streamline site visits efficiently.

OBJECTIVE

Momentum CRM aims to simplify and optimize real estate sales operations by providing:

✔ A structured lead management system to ensure no opportunity is lost.

✔ Real-time KPI tracking for better decision-making and sales performance monitoring.

✔ Automated site visit scheduling to eliminate manual coordination issues.

✔ A user-friendly and cost-effective CRM solution tailored to real estate businesses.

Our goal is to empower real estate business owners and their sales teams with a streamlined CRM that enhances operational efficiency, strengthens customer relationships, and drives higher property sales, all within a system tailored to their business needs.

EXECUTIVE SUMMARY

Real estate businesses struggle with lead management, tracking sales performance, and coordinating site visits efficiently. Existing CRM solutions like Zoho and Salesforce are expensive, complex, and not optimized for real estate workflows, making them impractical for small and mid-sized agencies.
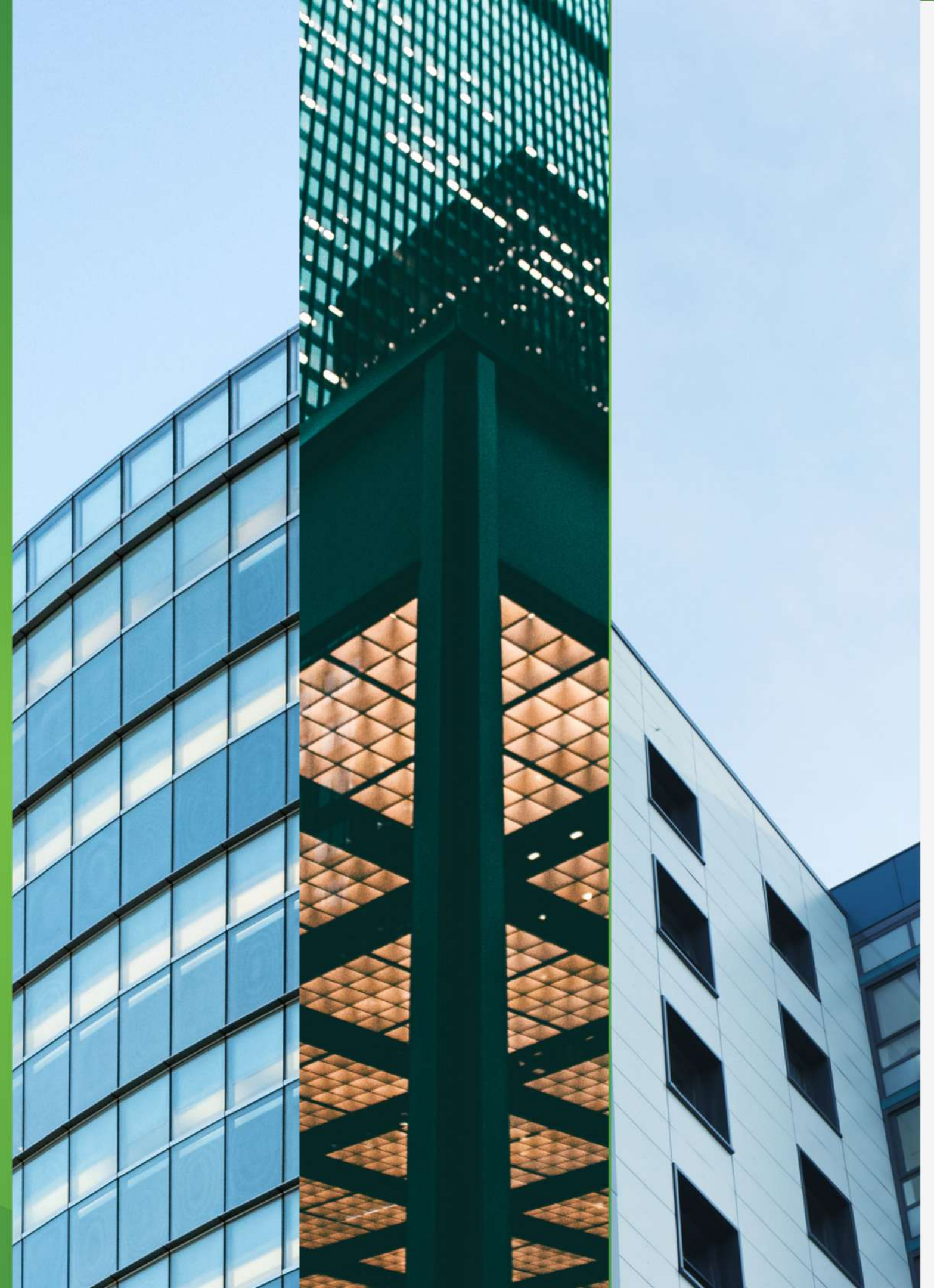
Momentum CRM is designed as a real estate-specific sales CRM to help business owners, brokers, and agents:

✓ Generate, track, and convert leads faster with a structured system.

✓ Automate site visit scheduling & client engagement.

✓ Provide real-time KPI dashboards for better decision-making.

✓ Use an intuitive, affordable CRM tailored to real estate sales workflows.
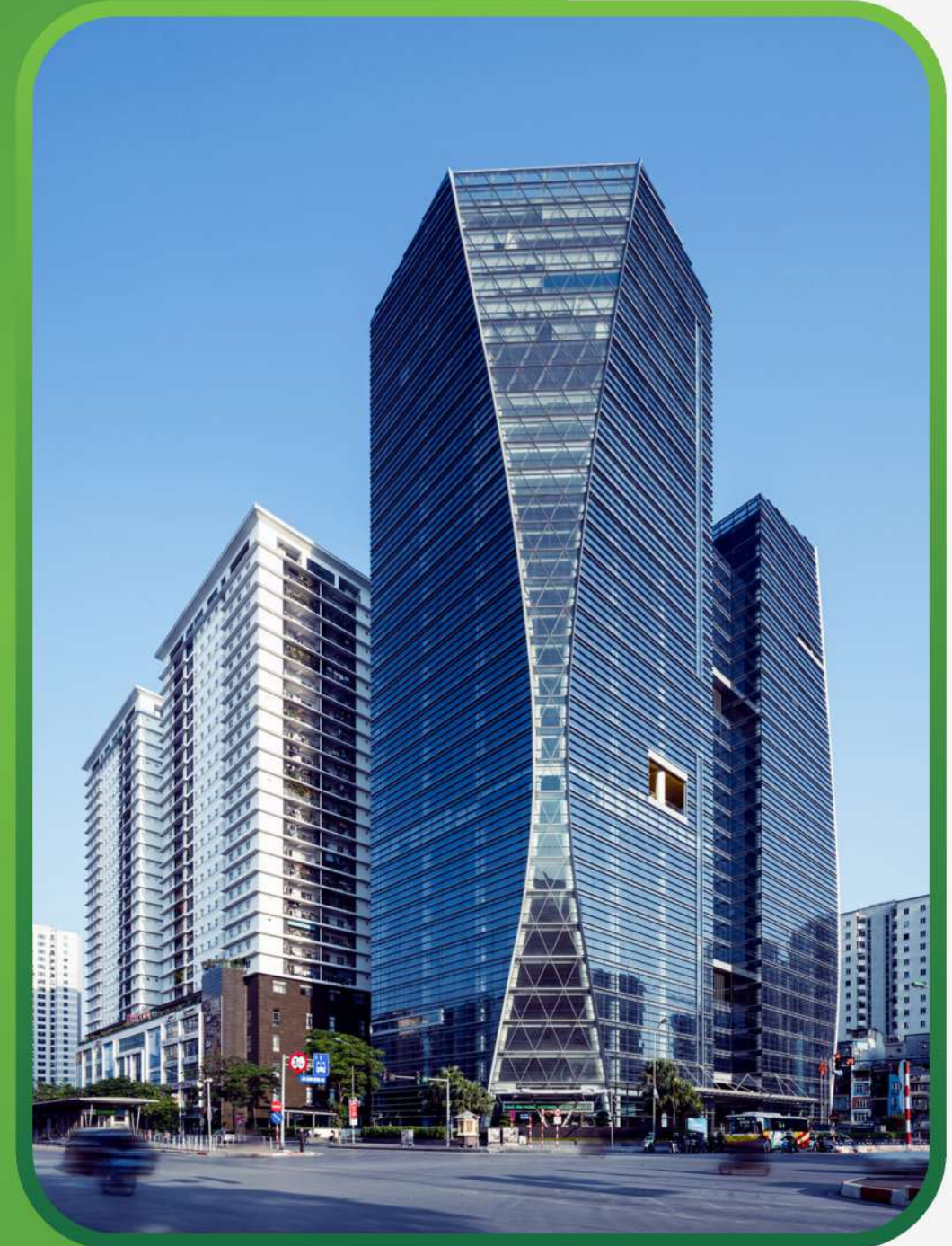
Problem Statement

- Leads come from multiple sources (website forms, referrals, social media, paid ads) but businesses lack a centralized system to track and engage them effectively.

- Missed follow-ups & slow response times result in low conversion rates and lost revenue.

- Lack of real-time visibility into sales performance makes it difficult to compare actual sales against targets, leading to ineffective strategy adjustments.

- No structured tracking system for individual agent performance, making it hard to evaluate productivity and optimize team performance

- Without data-driven insights, businesses struggle to forecast revenue and optimize their sales strategies.

- Clients experience delays in scheduling property visits due to manual coordination.

- No automated reminders or notifications lead to missed or unconfirmed site visits.

- Zoho & Salesforce charge ₹1,00,000+ annually for 10+ users, offering features that aren't real estate-specific.

- Small businesses struggle with high costs & complex features they don't need.

Vision of Improvement

Momentum CRM is designed to streamline lead management, enhance sales tracking, and improve client engagement for real estate businesses. By replacing fragmented workflows with an intuitive and automated system, it empowers businesses to:

- Ensure no lead is lost by centralizing inquiries from multiple sources into a structured database.

- Accelerate sales performance through real-time insights and data-driven decision-making.

- Eliminate manual coordination issues with automated follow-ups, appointment scheduling, and reminders.

- Optimize agent productivity with clear task tracking and structured performance monitoring.

- Offer an affordable, real estate-focused CRM tailored to the specific needs of agencies and brokers.

FEATURE PRIORITIZATION USING MOSCOW FRAMEWORK

Must-Have (MVP Features)	Should-Have (Next Iterations)	Could-Have (Future Growth)	Won't-Have (Not Required Now)
Lead capture (Website Form Submission)	Automated email follow-ups	Customizable dashboards	Social media lead integration
Lead status tracking	Commission calculation	Multi-agent pipeline view	Rental management system
Site visit booking & status tracking	Top Performing Agents (Monthly/Quarterly)	Mobile app version	Multi-language support
KPI dashboard (Sales tracking, conversion rates)	Follow-Up Urgency Indicator (Color-coded lead priority)	Advanced reporting & analytics	Marketplace for property listings

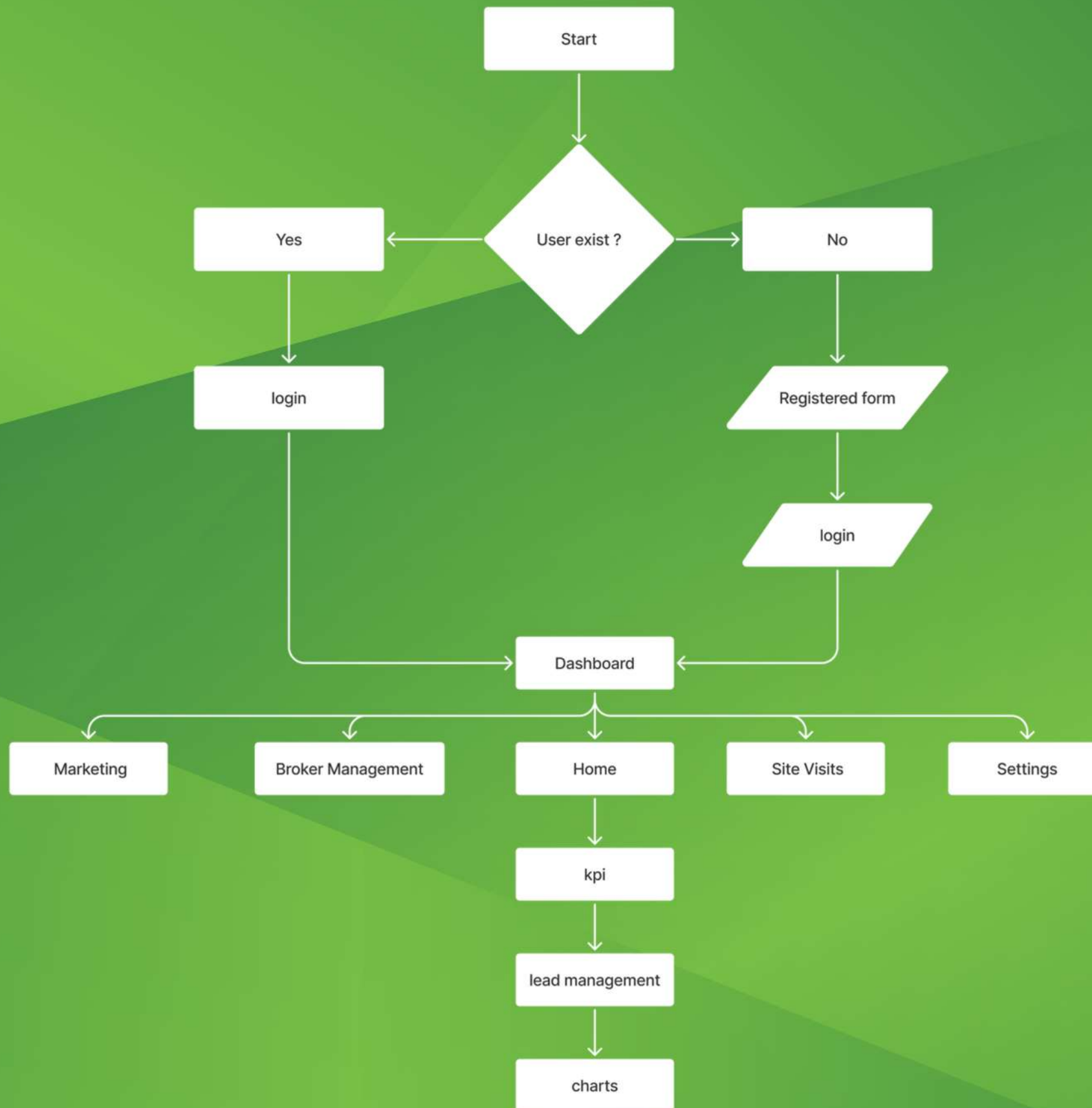# PRIORITIZATION STRATEGY: RICE SCORING

Feature	Reach (1-10)	Impact (1-10)	Confidence (1-10)	Effort (1-10)	RICE Score
Lead management system	9	10	9	4	20.25
KPI dashboard for business owners	8	9	8	5	14.4
Site visit scheduling	7	8	9	5	12.6
Agent performance tracking	6	7	7	6	9.8

EXECUTION ROADMAP

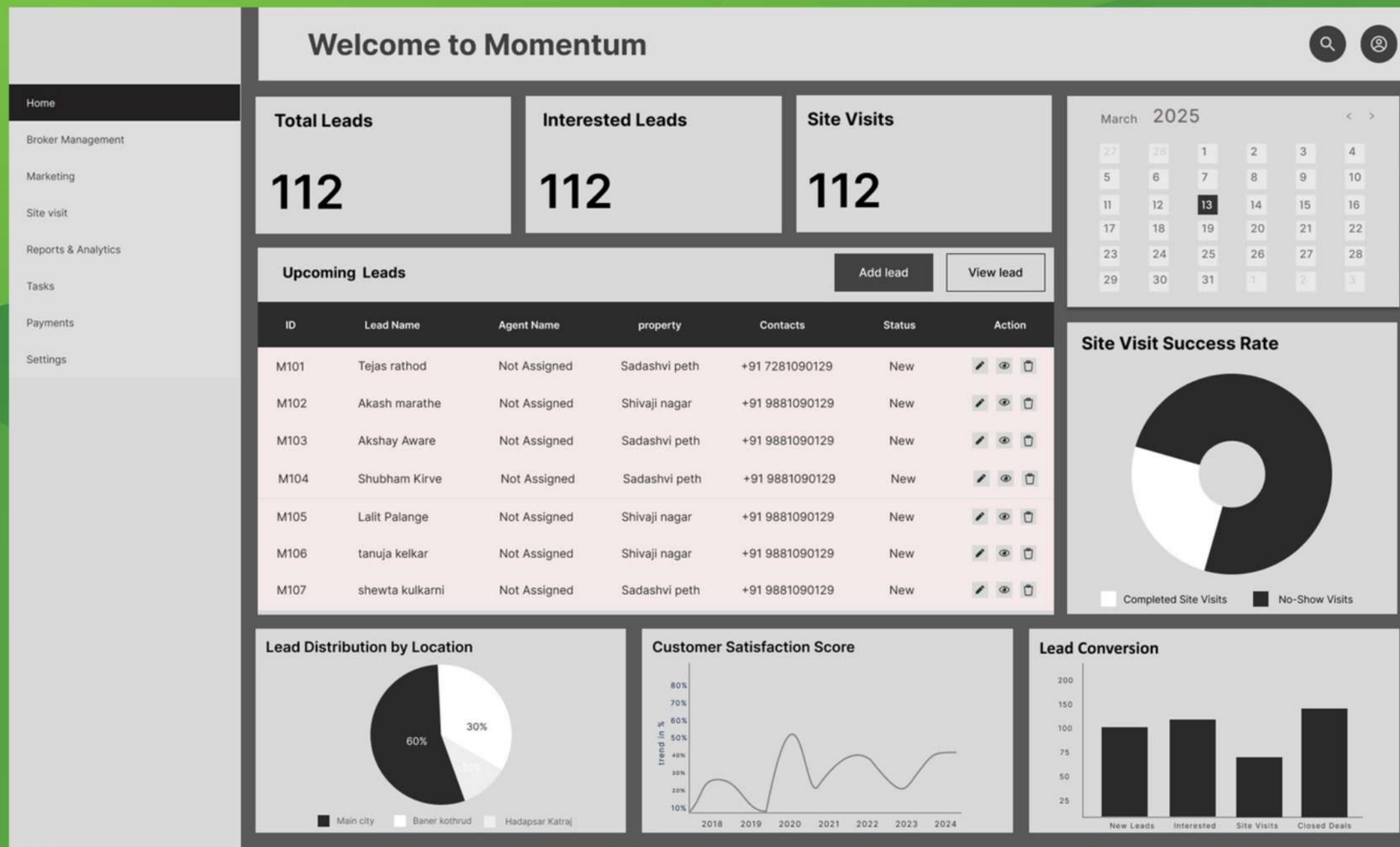| Phase	Key Focus	Feature Development	How We Sell?	Timeline
Phase 1	Build & Early Adoption	Core CRM (Lead tracking, Site visits, Follow-ups)	Start onboarding small agencies & brokers	Month 1-3
Phase 2	Enhance & Monetize	AI Lead Scoring & Email Automation	Convert free users to paid clients	Month 4-6
Phase 3	Scale Users	Mobile App, Multi-Agent Tracking	Expand to mid-size agencies	Month 7-9
Phase 4	Enterprise Growth	Custom Dashboards, API Integrations	Target large real estate firms & franchises	Month 10-12

GTM STRATEGY - HOW WE ACQUIRE & SCALE USERS

GTM Strategy	Execution Plan	Expected Impact	Timeline
Direct Sales	Partner with real estate agencies, onboard via demos & workshops.	Faster early adoption & trust-building.	Month 1-3
Freemium Model	Offer free CRM with limited features, upsell premium tools.	High lead generation, organic conversion.	Month 1-6
Referral Growth	Brokers/agencies earn credits for referring new users.	Viral growth with minimal marketing costs.	Month 3-9
Industry Partnerships	Integrate with property listing platforms (99acres, MagicBricks).	Instant access to a large broker network.	Month 6-12

SYSTEM FLOWCHART

To create a seamless and efficient experience in Momentum CRM, we mapped out the core user flow for the MVP. This flowchart visually represents how users interact with the system, ensuring smooth navigation, structured lead management, and an intuitive workflow. By outlining each step, from login to lead tracking and site visit scheduling, we establish a clear, user-friendly process that enhances productivity and ensures a streamlined real estate sales experience.

LOW-FIDELITY WIREFRAME CRM LAYOUT BLUEPRINT

To establish a clear and intuitive user flow, we designed a low-fidelity wireframe that lays the foundation for seamless navigation and data accessibility. This structured approach ensures efficiency, enabling real estate businesses to manage operations with clarity and speed.
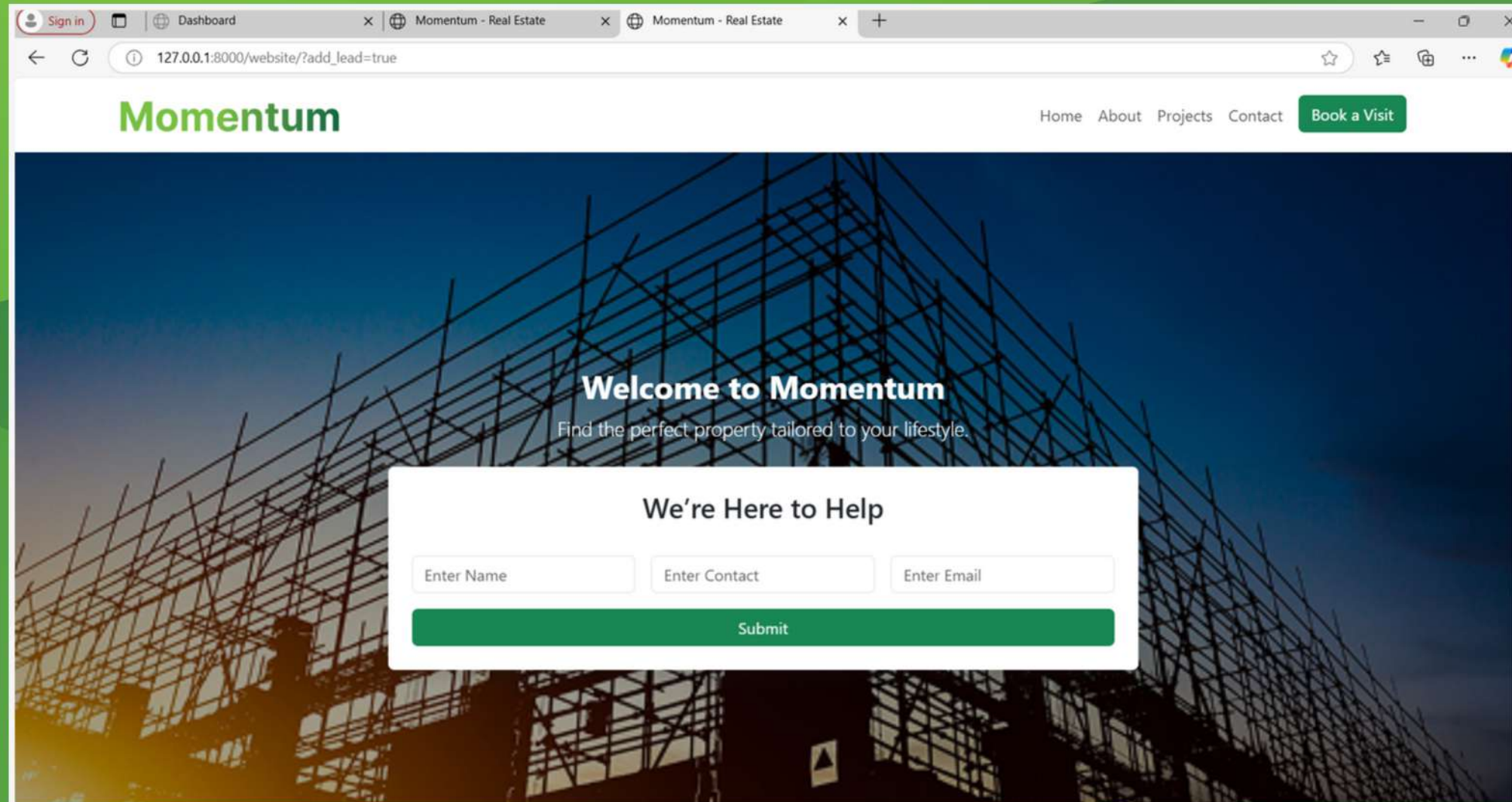
MVP KEY FEATURES :

The Minimum Viable Product (MVP) for Momentum CRM is focused on simplifying real estate lead management by integrating a website-driven lead capture system with a structured CRM dashboard. This ensures efficient tracking, engagement, and conversion of potential buyers.

Website Integration: A real estate website enables users to explore properties, schedule site visits, and submit inquiries with ease. Beyond lead generation, it simplifies the buyer's journey, ensuring a smooth transition from interest to action.
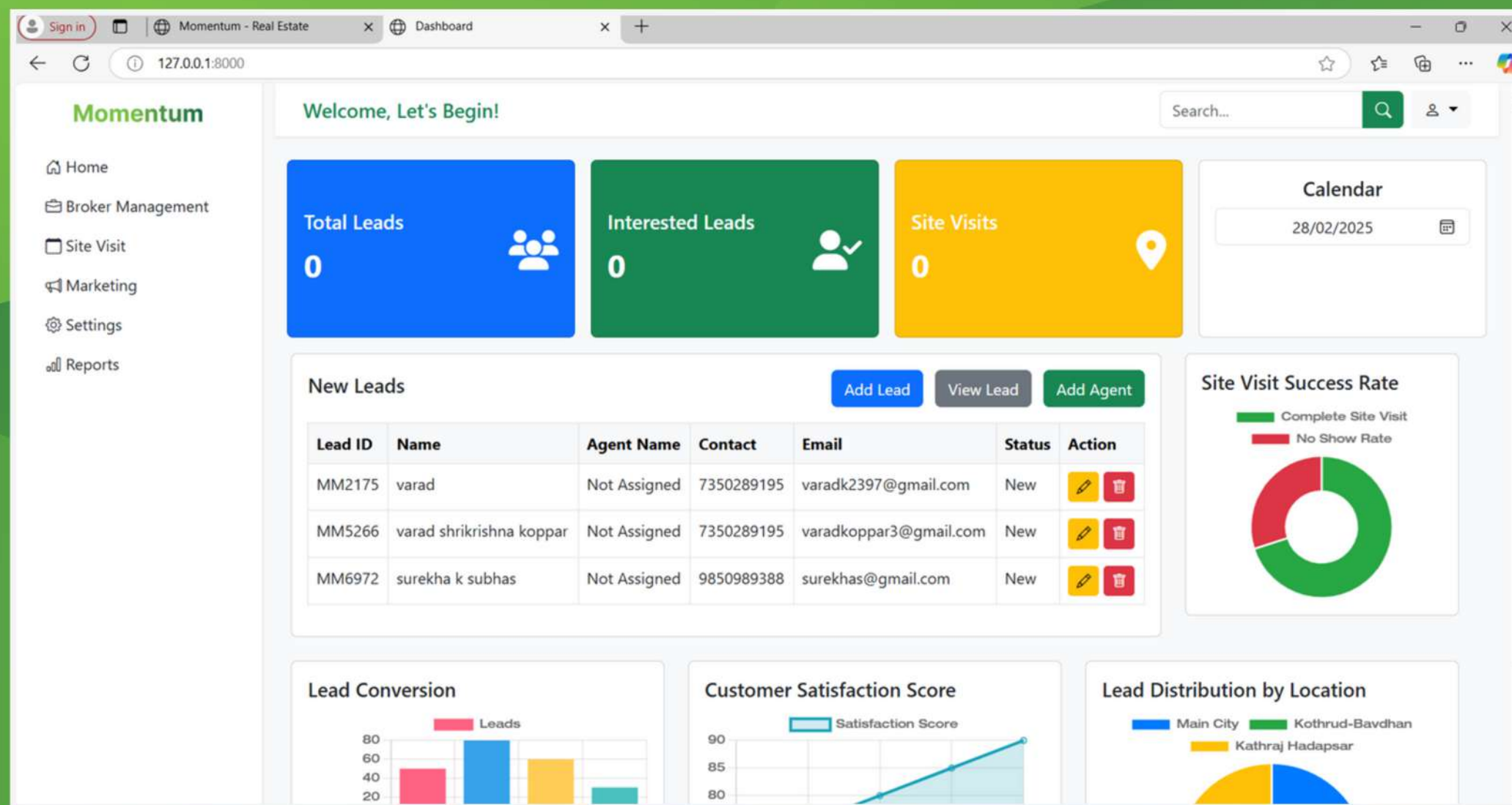
CRM Dashboard for Lead Management: Designed for efficiency, the CRM provides real-time insights into key metrics such as Total Leads, Interested Leads, and Site Visits. A structured lead table ensures easy tracking, while the Kanban board allows seamless status updates and smooth lead progression. With an intuitive interface, agents can manage follow-ups efficiently, enhancing overall workflow and conversion rates.
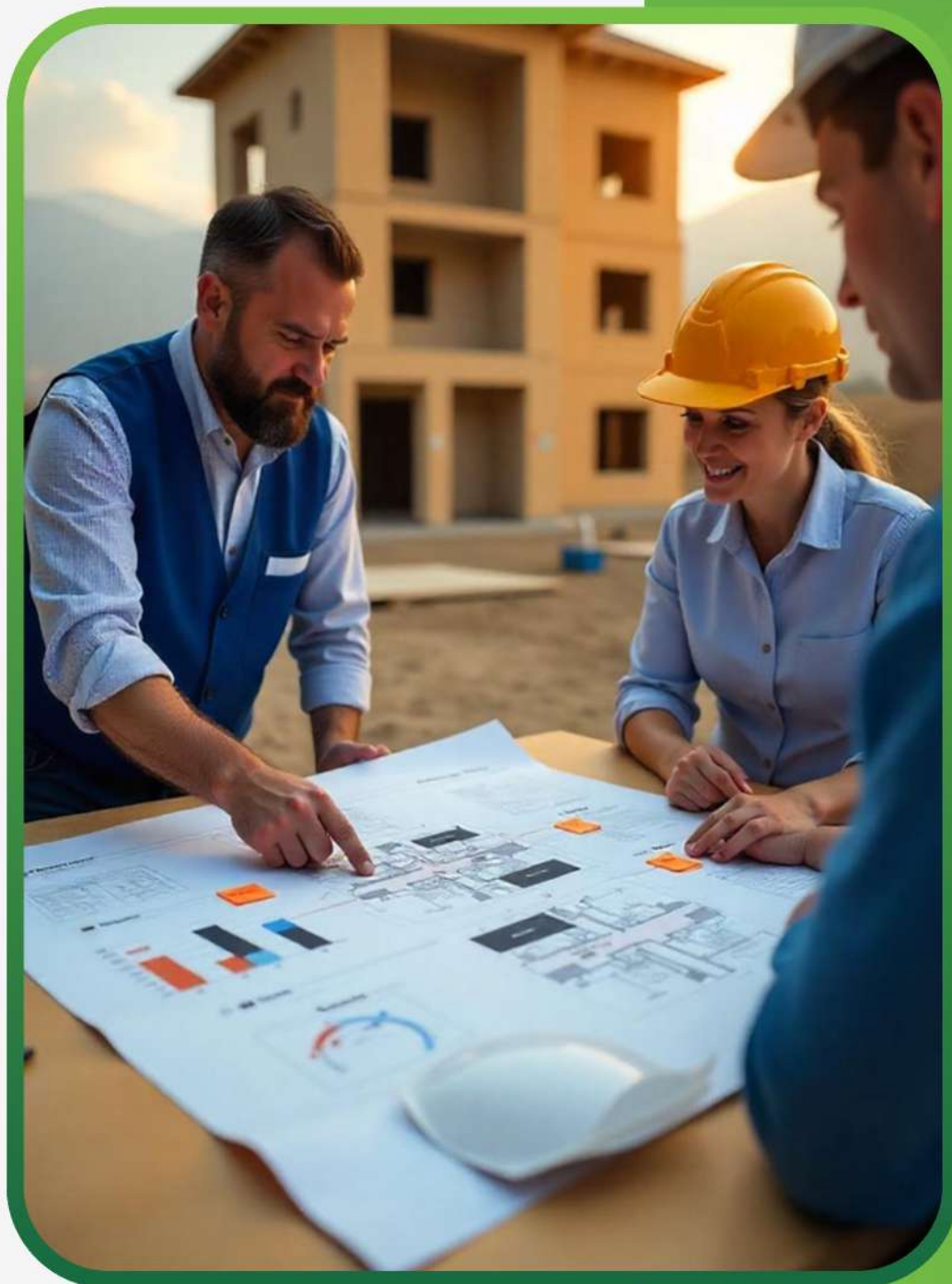
Development :

We've established the foundation for lead capture and management in Momentum CRM. The static website allows users to submit their details, which are stored and displayed in the CRM dashboard. This phase focuses on seamless lead collection, ensuring a structured and efficient process for managing incoming data. With this setup, businesses can easily track leads, organize their workflow, and access relevant information whenever needed.

Turning Vision into Reality

Momentum CRM is shaping into a structured system for seamless lead management. The MVP is in progress, with lead capture and tracking already in place. The dashboard provides a clear view of collected leads, ensuring they are managed and organized efficiently. As development progresses, structured workflows and deal management will continue to take shape, refining the overall system.

Key Metrics :

To measure the impact of Momentum CRM, we focused on real challenges businesses face and how our system improves lead management efficiency.

Lead Capture & Response Efficiency –Businesses take 24 to 48 hours to respond due to scattered lead sources. Momentum CRM records and categorizes leads instantly (New, Interested, Finalize Deal, Closed Deal), enabling teams to respond 3x faster and improve conversions.

Sales Pipeline Visibility & Deal Progression – Without a structured system, nearly 40% of potential deals stall due to poor tracking and follow-ups. Momentum CRM provides a clear status flow, ensuring no lead is lost in the process. Businesses can easily move leads through stages, reducing deal closure time by 30-40%, resulting in faster revenue generation.

Real Estate-Specific Simplicity & Adoption – Traditional CRMs are complex and take weeks to onboard. Momentum CRM is built for real estate, allowing teams to start using it immediately without extensive training. With structured lead tracking, agents manage client interactions with 80% less effort, focusing on closing deals efficiently.

WHAT ARE YOUR TOP EVENTS?

Event count by Event name

EVENT NAME	EVENT COUNT
page_view	20
scroll	18
user_engagement	17
form_start	6
form_submit	6
first_visit	1
session_start	1

View events →

Views by
Page title and scree...

PAGE TITLE AND S...	VIEWS	
Register	9	-
User Login	9	-
Dashboard	2	-

Last 7 days   View pages and s... →

Data-Driven Insights

Tracking user interactions provided valuable insights into lead engagement. Event tracking revealed key interaction points, drop-offs, and engagement trends, helping refine the CRM workflow. These insights ensure a seamless user experience, making lead management more efficient and intuitive.

Business Impact

Faster Lead Response: Traditional response times range from 24-48 hours due to scattered lead sources. Momentum CRM centralizes leads instantly, enabling teams to respond faster and reduce lead drop-offs.

Higher Conversion Rates: Lack of structured follow-ups often results in lost opportunities. Momentum CRM ensures every lead is tracked and nurtured, helping businesses close deals faster and improve revenue flow.

Optimized Sales Workflow: Without a structured system, potential deals can slip through the cracks. By streamlining lead tracking and follow-ups, businesses can maximize sales efficiency and maintain a strong pipeline.

Improved Team Productivity: With automated lead tracking and follow-up reminders, agents spend less time on manual data entry, allowing them to focus more on engaging clients and closing deals efficiently.

Scope & Future Growth

Top-Performing Agents Dashboard – Introduce a monthly/quarterly performance tracker to help managers identify top agents and optimize team strategies.
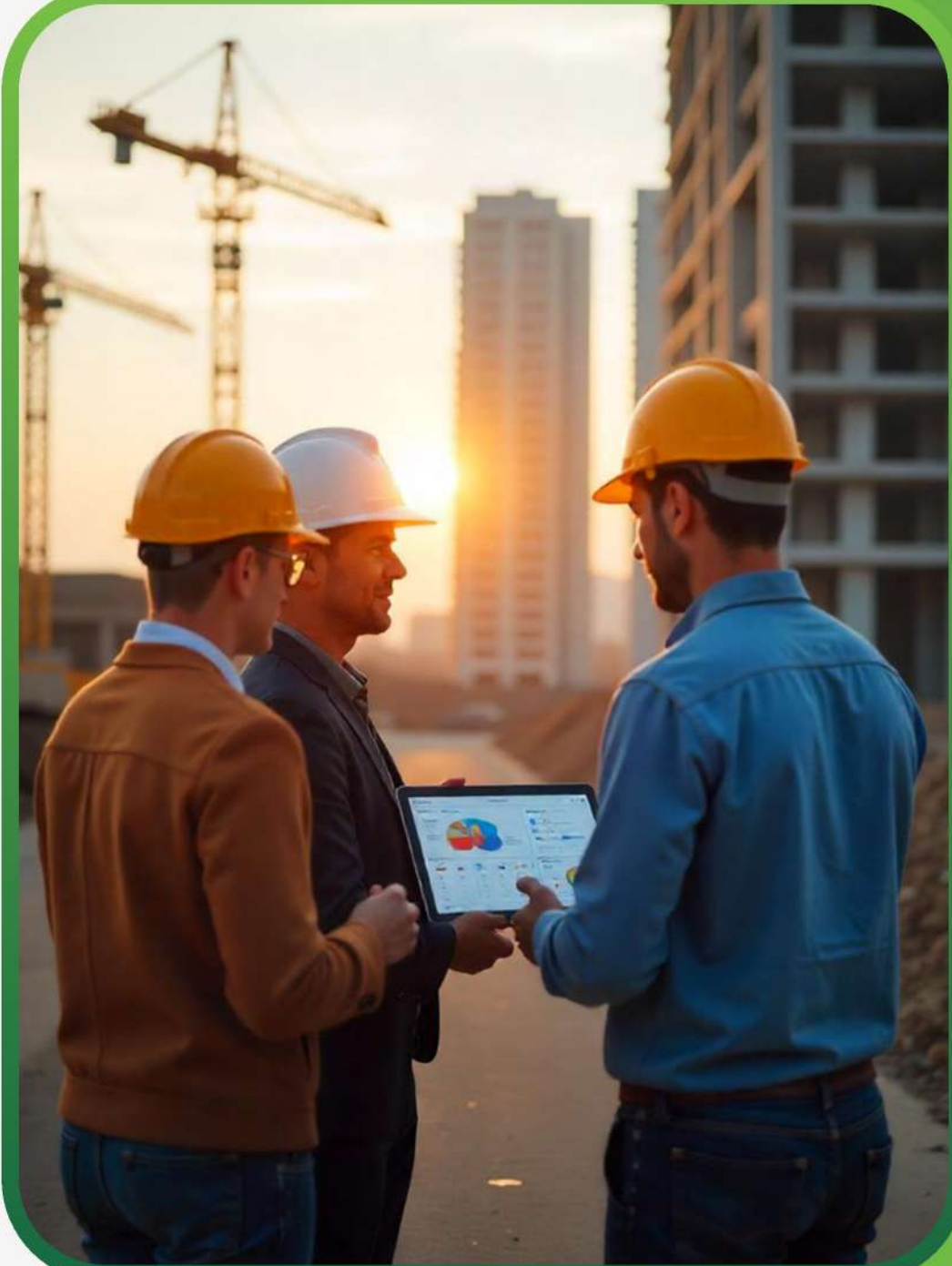
Follow-Up Urgency Indicator – Implement a color-coded lead priority system to highlight high-value prospects and overdue follow-ups, ensuring timely engagement.

Mobile App Version – Develop a dedicated mobile app to allow agents to track leads, schedule site visits, and manage follow-ups on the go.

Advanced Reporting & Analytics – Enhance data-driven decision-making with customizable reports, conversion insights, and predictive sales analytics.

Social Media Lead Integration – Automate lead capture from LinkedIn, Facebook, and Instagram, enabling businesses to engage prospects directly within the CRM.

Conclusion :

Momentum CRM is built to simplify lead management for real estate, ensuring a structured and efficient sales process. By streamlining lead capture, tracking, and engagement, it enables faster responses, reduces follow-up delays, and improves conversions. With a clear workflow for managing inquiries and deal progression, teams can focus on building relationships and closing deals rather than manual tracking.

Designed to align with real estate workflows, Momentum CRM enhances productivity, organizes leads effectively, and brings clarity to the sales pipeline. While the MVP is still in progress, the system is already shaping into a seamless solution for managing leads efficiently.

Thank You

We appreciate your time in reviewing our case study. If you have any feedback or insights, we'd love to hear your thoughts!