SALESFORCE PROJECT

PROJECT TITTLE :RealEstate CRM (Property &AgentManagement)

* PROBLEM STATEMENT:- Real estate firms struggle with property listings, agent performance, and client leads.
* INDUSTRY: Real Estate
* PROJECT TYPE: Salesforce CRM Application Development
* TARGET USERS: Real Estate Agents, Sales Managers / Team Leads, CRM Administrators
* PHASE 1 OF THE PROJECT:-

**1. Requirement Gathering**

* Conducted meetings and interviews with key stakeholders (agents, managers, admin staff) to understand current pain points.
* Identified core functional needs: property listing management, lead tracking, agent performance monitoring, etc.

**2. Stakeholder Analysis**

* Defined roles and responsibilities:
  + **Agents** – need tools for managing listings and client follow-ups.
  + **Sales Managers** – require dashboards and performance insights.
  + **Clients** – need an easy way to browse and inquire about properties.

**3. Business Process Mapping**

* Documented current workflows:
  + Lead generation → Agent assignment → Property visits → Deal closure → Contract finalization.
* Identified bottlenecks and areas for automation or improvement.

**4. Industry-Specific Use Case Analysis**

* Studied real estate CRM trends (e.g., automated follow-ups, geolocation features, mobile-friendly client portals).
* Benchmarked features from popular tools like Zillow, Realtor.com, and existing CRM apps on Salesforce AppExchange.

**5. AppExchange Exploration**

* Researched relevant apps like:
  + Property listing components
  + Real estate dashboards
  + Mapping tools
* Analyzed gaps to determine what can be built vs. reused.