

salesforce

Implementation of Salesforce for Real Estate Company

Client Profile

Our client is a prominent real estate development and property management company with a diversified portfolio of residential, commercial, and mixed-use properties. Operations in multiple cities have made them specialists in delivering innovative real estate solutions, superior customer experience, and efficient property management services.



Current Landscape

As the client business grows organically, the client was not using any tool other than Microsoft Excel, or Google Forms, to manage lead distribution among team members and track the status of the same.




Region
London, UK

Project Background

The client was struggling to handle customer relationships, property sales, leasing, and tenant management. Their current CRM system was antiquated and was generating inefficiencies in lead - management, customer communication, and data insights. The business needed a scalable and strong platform to improve its sales, marketing, and customer service processes.

➤ Industry We Served

Real Estate

➤ Technology we used

 Sales Cloud

 Service Cloud



Challenges Faced by Our Client

➤ Lead Management Inefficiencies:

The client could not effectively capture, track and follow up with prospective buyers and renters. The lack of a structured process resulted in opportunities lost and poor conversion rates.

➤ Difficulty in Tracking Properties:

It was hard to handle multiple listings, properties, and states of availability since information existed scattered over different systems.

➤ Lack of Real-Time Data Analytics:

Lack of real-time data restricted the ability to make informed decisions on market trends, customer requirements, and sales performance.



➤ Manual Processes and Communication Gaps:

Their reliance on emails and spreadsheets to manage contracts, lease renewals, and customer relationships resulted in inefficiencies and delays.





➤ Poor Customer Experience:

Slow response times to inquiries and limited self-service options led to dissatisfaction among potential buyers and tenants.

Solution Proposed

To overcome these issues, we deployed Salesforce CRM, a rich-featured customer relationship management solution with dynamic capabilities, to automate processes and integrate data

- **Automated Lead Management System**
- **Centralized Property Management**
- **Real-Time Analytics Dashboard**
- **Workflow Automation**
- **Customer Self-Service Portal**



➤ Automated Lead Management System

Our team implemented Salesforce Sales Cloud to automate lead follow-ups, tracking, and capture, to ensure that no prospective sale was ever lost.



➤ Centralized Property Management

We have consolidated all the listings of property, availability, and sales into one platform where we can monitor them and manage them easily.





➤ Real-Time Analytics Dashboard

We have provided Salesforce-driven insights that allow the customer to monitor sales performance, customer tastes, and market trends and make well-informed decisions.

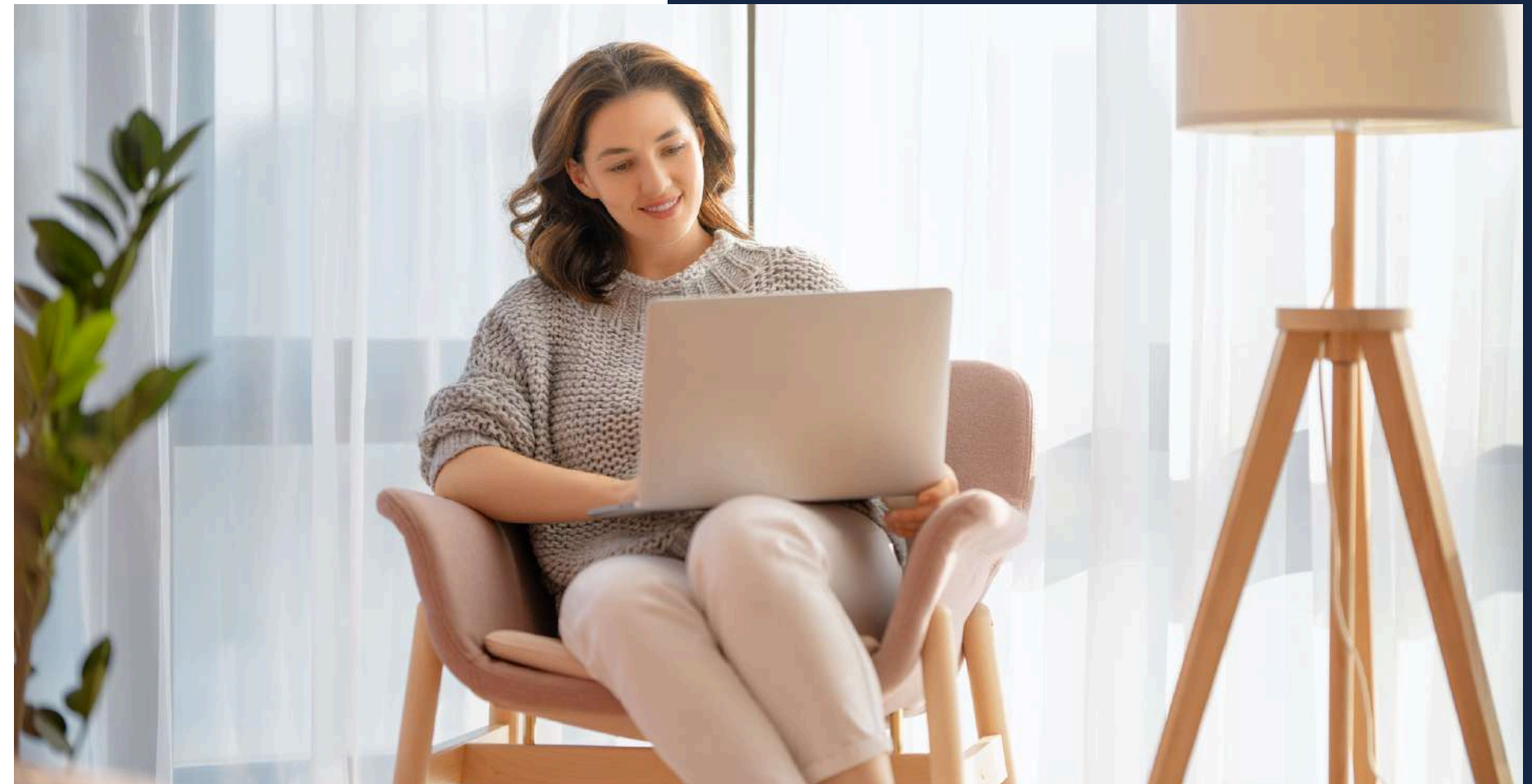


➤ Workflow Automation

Automation of such critical processes as contract drafting, lease renewals, and customer follow-ups for maximizing efficiency and reducing manual efforts.

➤ **Customer Self-Service Portal**

We also developed a Salesforce Experience Cloud portal where buyers and tenants are able to view property details, send inquiries, view requests, and view documents, which has boosted satisfaction and engagement overall.





Results

➤ Increase in Lead Conversion Rates

By using Salesforce, we have made their follow-ups and lead tracking automated, thereby enhancing sales efficiency.



➤ Improved Property Tracking

They were provided with current information regarding property status, reduced mismanagement and improved decision-making.



➤ Faster Decision-Making

Real-time analytics access influenced leadership to make strategic decisions.



➤ **Operational Efficiency Boost**

Automated activities minimized manual work, which resulted in enhancing task completion time.



➤ **Enhanced Customer Satisfaction**

Faster response times and self-service enhanced customer satisfaction scores.



About CRM Masters Infotech

ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

We are a CRM consultant company focusing on Shopify eCommerce solutions. With over 8+ years of experience and over 2050+ successful projects, we have a proven track record of helping businesses optimize their workflows and boost growth. Our team of 100+ expert developers specializes in delivering top-notch eCommerce platforms, CRM integrations, and tailored business solutions to meet our client's needs.

LET'S TALK & FIND YOUR SOLUTION



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