



The World's #1 CRM Platform to Transform Real Estate Sales

Empower your sales teams with AI-driven insights, personalized customer engagement, and a connected platform that accelerates lead conversion and delivers exceptional buyer experiences.



SALESFORCE

DATA CLOUD • MARKETING CLOUD • DIGITAL ENGAGEMENT

Why Salesforce for Real Estate Sales?

A Connected Platform to Engage, Convert, and Retain Buyers



360° Customer View

Maintain a complete view of every prospect—from first inquiry and site visit to booking and post-sales engagement.



Faster Lead Management

Capture leads from multiple channels, automate assignments, and ensure timely follow-ups to improve conversion rates.



Personalized Customer Engagement

Deliver relevant communications across Email, SMS, and WhatsApp based on customer interests and buying stage.



Seamless Sales Collaboration

Enable sales teams to manage interactions, appointments, follow-ups, and customer conversations from a single platform.



AI-Powered Sales Insights

Identify high-intent buyers, prioritize leads, and empower sales teams with actionable recommendations.



Complete Sales Visibility

Monitor lead pipeline, sales performance, campaign effectiveness, and customer engagement through real-time dashboards.

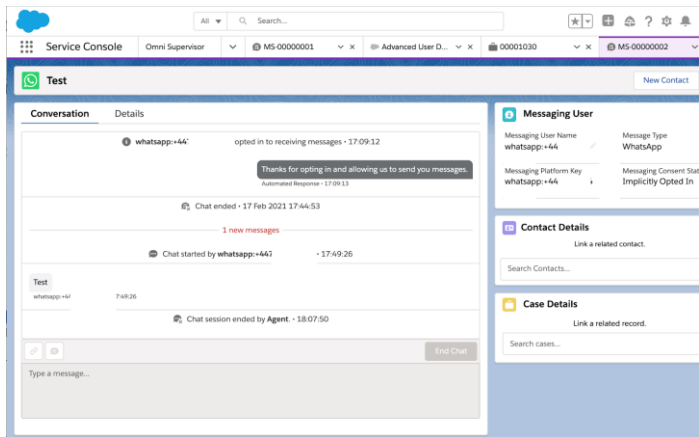
Business Challenges & Our Salesforce Solution

Fragmented systems create missed opportunities. Here's how Salesforce closes every gap.

❌ Challenge	✅ Implemented Solution
Scattered customer data	Data Cloud unifies profiles into a single 360° view
No visibility into website activity	Web SDK captures behavior; engagement scores prioritize high-intent leads
Generic marketing messages	Marketing Cloud Journeys deliver personalized Email, SMS & WhatsApp
Manual lead follow-ups	Automated journeys trigger instantly on CRM status changes
Duplicate communications	Unified profiles sync messaging across Sales, Marketing & Support
Slow WhatsApp responses	Digital Engagement with Omni-Channel routing & real-time conversations

Implementation — Digital Engagement (WhatsApp)

Empower sales agents to engage with prospects directly through WhatsApp within Salesforce, enabling real-time conversations, seamless follow-ups, and complete visibility of every customer interaction.



Delivered Features

- Automatic lead creation & existing-lead matching
- Omni-channel routing, business-hours queues, agent assignment
- Conversation history, manager escalation, bulk messaging

Customer Flow

Incoming message → Identify or create lead → Route → Agent response → Persist conversation in CRM.

Business Impact

Faster responses, zero missed conversations, and full visibility to support compliance and coaching.



Implementation Snapshot — Marketing Cloud Engagement

Automated, channel-aware journeys that deliver the right message at the right time — at scale.

Welcome Journey

Automated onboarding message immediately after lead creation to capture engagement and drive next steps.

Lead Nurturing

Stage-based education sequences tailored to project interest and lifecycle stage.

Site Visit & Reminder Journeys

Confirmations, reminders, directions and follow-ups that reduce no-shows and increase conversions.

Offers & Re-engagement

Personalized offers driven by Data Cloud scoring and event signals; automated re-engagement for inactive prospects.

CRM-driven automation: lead-status changes trigger journey transitions to ensure seamless progression from New → Qualified → Offer → Visit → Close.

Customer Journey Example — Sequence

01

1. Discover

Visitor browses properties; behavior events flow into Data Cloud and create an engagement record.

02

2. Engage

Marketing Cloud triggers tailored nurture via email/SMS/WhatsApp based on intent scoring.

03

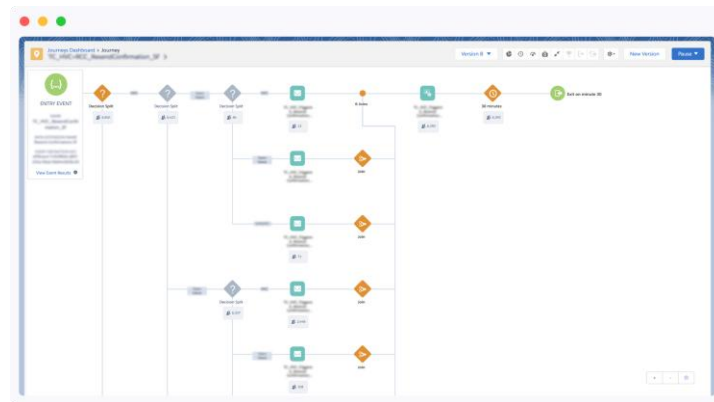
3. Visit

Site visit is scheduled and confirmed; reminders reduce no-shows and capture visit outcome.

04

4. Convert

Sales manages negotiation via unified CRM records and keeps conversation history for compliance.



Implementation — Data Cloud

Customer intelligence and personalization engine that centralizes behavioural signals, resolves identity, and creates activation-ready audiences to drive real-time, personalized experiences.

Lead Propensity & Scores



Web Engagement 0%

Digital Engagement 0%

Presales 40%

Agent Score 20%

Customer Sentiment 50%

Data Integration

CRM (Sales Cloud Leads), Web SDK, marketing engagement sources, and behavioural events consolidated into a single data plane.

Customer Intelligence

Unified customer profiles, identity resolution, anonymous → known matching, and a Customer 360 view for every prospect and tenant.

Behavior & AI

Property views, site visits, form submissions, and click events feed AI: engagement scoring, high-intent detection, and segmented audiences.

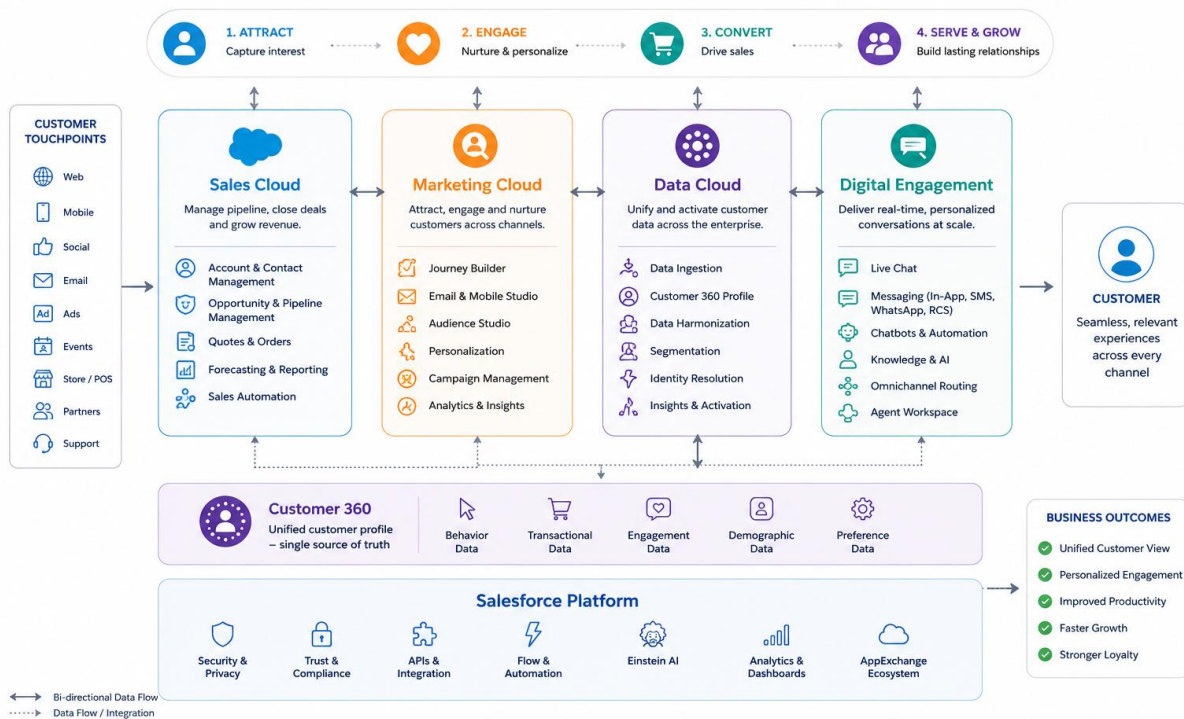
Business Value

Single customer view, improved understanding, personalized marketing, and AI-powered intelligence ready for activation.

Technology Stack Delivered

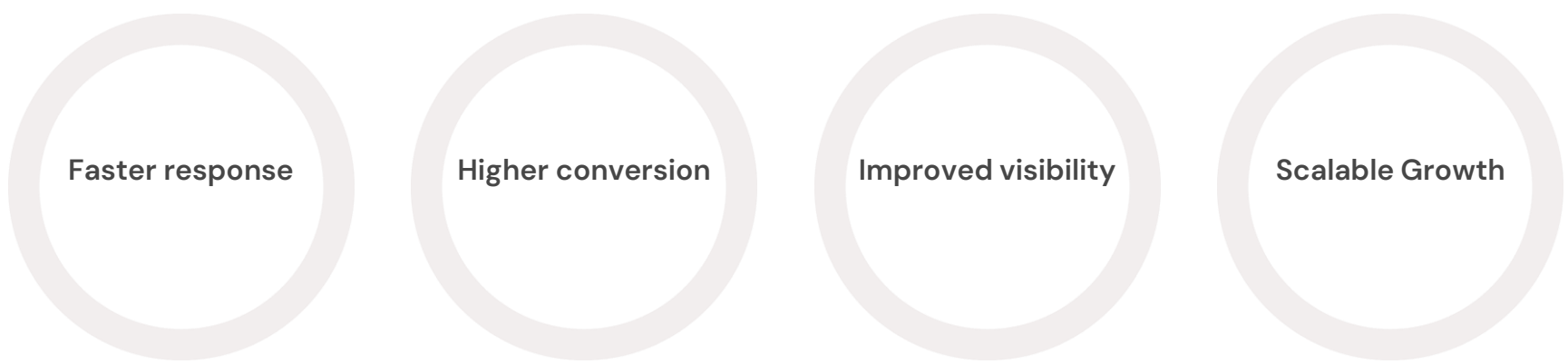
Salesforce Customer Engagement Architecture

Sales Cloud + Marketing Cloud + Data Cloud + Digital Engagement working together



- Salesforce Data Cloud — unified data plane & identity resolution
- Marketing Cloud Engagement — multi-channel journey orchestration
- Digital Engagement — WhatsApp native conversations inside Salesforce
- Web SDK — capture in-session behaviour and property interactions
- AI Scoring & Segmentation — action-ready audiences for activation

Business Outcomes Delivered



Faster response

Significantly reduced initial contact time through automated routing and WhatsApp integration.

Higher conversion

Personalized nurture and intent scoring move more leads to site visits and offers.

Improved visibility

Full conversation and behaviour history in Salesforce for coaching, compliance, and analytics.

Scalable Growth

A flexible platform that scales with business growth, enabling seamless expansion across projects, sales teams, channels, and customer engagement.

Key stakeholder benefits: Sales efficiency, marketing performance, and superior customer experience — measurable improvements across lead velocity, conversion rates, and NPS.

Why This Architecture — Strategic Rationale

Unified Customer Profile

Eliminates data silos and provides a single source of truth for prospect and tenant interactions.

Real-time Personalization

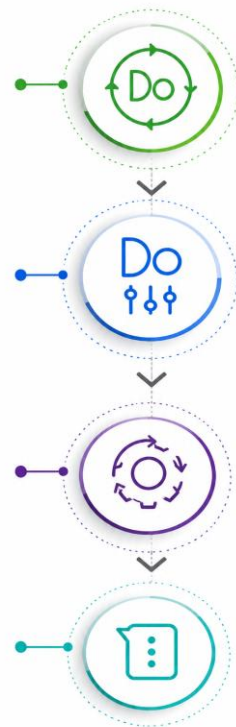
Behaviour-driven journeys and AI scoring enable contextually relevant outreach at scale.

Operational Efficiency

Automated journeys and routing reduce manual work, speed follow-up, and increase capacity of sales teams.

Consistent Experience

Customers receive coherent, timely communications across channels — improving satisfaction and conversion.





Summary & Next Steps

We delivered a connected Salesforce ecosystem that turns site behaviour into personalized journeys and real-time conversations — improving lead conversion, response time, and customer experience.

1

1. Validate

Confirm key data sources, events, and priority audiences with stakeholders.

2

2. Pilot

Run a rapid pilot for a single project to measure conversion uplift and journey performance.

3

3. Scale

Roll out across portfolios, extend scoring models, and operationalize analytics for continuous improvement.



Recommendation: Start with a 6–8 week pilot focusing on high-intent properties to prove ROI quickly.