

## Company Overview

### Industry Type

Real Estate

### Location

Alabama

### Solution Used

Sales Cloud

*“ Performance visibility, Auto-segmentation, and Fraud-checking for Sale Cloud-managed rewards and estate-agent operations ”*



## Challenge

- The firm wanted a platform to push fresh Opportunity and Record updates and drive decision-making confidence for agent interactions.
- Important prospecting, territory, and engagement details fell through when handling larger data volumes with increasing data generated during interactions.
- Owing to dynamic on-call interactions, as is characteristic of real-estate work, an absence of records for Leads further exacerbated follow up inconsistencies. In turn, this quickly descended into an opaqueness over performance metrics.
- Even worse, the lack of visibility also manifested as unowned access and modifications to sensitive prospect data, emboldening bad-actors.



## Solution

- For regular updates, single-truthing, and smooth circulation of information in the organization, we built-in a LeaderBoard to maintain updated information.
- Salesforce-managed Records for employee details were set up that lent themselves to automated anniversary and birthday greetings.
- We helped the client with easier tracking and segmentation into relevant categories to inform representative apropos of the potential client's region of interest.
- With so much riding on agent-driven operations, we also put together one-view dashboards to track employee performance and their work hours every week.
- Fraud checks were devised to assist xxx with identifying unwarranted modifications made by employees. Parallelely, an employee tracker collected all changes made to facilitate a fallback to the correct version, and confront the employee about self-serving propensities and subsequent escalations.



## Result

- Sharing internal success stories with employees brought out motivation in the workplace.
- Greater performance visibility drove healthy internal competition and best-fit task assignments.
- Thoughtful, employee-centric greetings reflected a culture of care inwards and strengthened employee relationships.
- Lead tracking insights helped boost revenue figures and lead generation strategies.
- Better working environment and proportionate recognition fostered employee retention and lowered turnover.
- Expedited management, supervision, and fraud checks gave back time to the upper rung, freeing them up to pursue more rewarding business directions.