

Company Overview

Industry Type

Real Estate Services

Location

Noida, India

Solution Used

Sales Cloud

“ Location-based E-signatures, a Property-search portal, and Site Visit Scheduling for a Real Estate establishment in Noida, India ”



Challenge

- Like many real-estate firms, . Their primary requirement was to ease document signage without watering down authentication.
- Another challenge was to provide the end-clients a portal to shortlist properties as per preference and drive down search discovery times.
- With agents primarily working out of their inbox, their entire documentation done over emails, which meant closing and followup times were stretched.
- Dealers also found it increasingly hard to stay on top of site-visits, an essential fixture of real-estate operations that depended on many(often dodgy) variables aligning together. The firm looked to us for ways around easier scheduling, rescheduling, and visibility for site viewing excursions.



Solution

- Get the proforma signed by the client online and reduce the paperwork further leading to speeding up of process.
- Location tracking helps in ensuring authentication is provided on Location itself and the proformas are signed after the site has been visited.
- Configuration of salesforce and a website to show the available properties so that the customer can search for properties according to their choice and dependency on the sales rep. is eliminated.
- Schedule the date and time for the property visit in order to ensure that both the sales. and the customer are reminded of the visit via email.
- Separate logins for the sales representative to view the date, time and place for meeting with the customer.



Result

- The process from searching a property to signing documents was made rapid as well as authentic, leading to an overall increased client experience.
- Customers were now able to search conveniently for the properties in their preferred location on their own. Hence, dependency on the sales rep to show multiple available properties reduced significantly.
- Online modules allowed easy accessibility and the TAT was decreased. The online portal not only resulted in speeding up property search but also compared the various options available to choose the right property.
- Timely reminders, increased user interaction. The effective scheduling of site-visits is fostered and the frequency of follow ups decreased.