

# Case Study: Your Home Sold Guaranteed Realty, NCT

Enhancing Integration Between WooSender and Propertybase for Your Home Sold Guaranteed Realty, NCT



**YOURHOMESOLD**  
GUARANTEED REALTY



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## Overview

**Project:** WooSender Integration with Salesforce (SFDC)

**Client:** Your Home Sold Guaranteed Realty, NCT

**Objective:** Enhance integration between WooSender and Propertybase to optimize contact, event, and campaign synchronization, lead management, and messaging protocols.

## Summary

The project aimed to create a seamless bi-directional integration between WooSender and Propertybase to enhance lead management and communication protocols. This included customizing contact, event, and campaign synchronization, refining lead management processes, and addressing messaging issues to ensure accurate and timely communication with clients.

## Challenges:

- **Bi-Directional Integration:** Establishing a robust bi-directional integration between WooSender and Propertybase to ensure seamless synchronization of contacts, events, and campaigns.
- **Custom Lead Plans:** Ensuring new seller leads from Source Zbuyer trigger the 'ISA - Zbuyer New Lead & Attempted Contact Plan' in WooSender on day 7 instead of the default plan.
- **Lead Transition:** Automatically transitioning leads to the prospecting stage in WooSender after 30 days in the Attempted Contact stage.
- **Messaging Protocols:** Preventing clients from receiving messages while in appointment or signed stages to avoid confusion and maintain professionalism.
- **Excluding Converted Leads:** Ensuring that converted leads are not sent to WooSender to avoid unnecessary follow-ups.
- **Task Generation:** Improving task generation and updates from WooSender to Propertybase to streamline workflow and ensure timely follow-ups.

## Solutions Implemented

- **Robust API-Based Integration:** Developed a robust API-based integration between WooSender and Propertybase, ensuring bi-directional synchronization of contacts, events, and campaigns. This integration facilitated seamless data flow and real-time updates between the systems.
- **Customized Lead Plans:** Implemented a mechanism to trigger the 'ISA - Zbuyer New Lead & Attempted Contact Plan' on day 7 in WooSender, overriding the default plan. This customization ensured that new leads from Source Zbuyer received the appropriate follow-up and attention.
- **Automated Lead Transition:** Configured WooSender to automatically transition leads to the prospecting stage after 30 days in the Attempted Contact stage. This automation ensured that leads were nurtured and moved through the sales pipeline efficiently.
- **Refined Messaging Logic:** Refined the messaging logic in WooSender to prevent clients from receiving messages while in the appointment or signed stages. This adjustment ensured that communication was appropriate and relevant to the client's current status.
- **Exclusion of Converted Leads:** Modified the integration to exclude converted leads from syncing with WooSender. This prevented unnecessary follow-ups and ensured that sales efforts were focused on unconverted leads.
- **Enhanced Task Generation:** Improved the task generation process to ensure that updates from WooSender were accurately reflected in Propertybase. This enhancement streamlined workflow and ensured that follow-up tasks were generated and assigned promptly.

## Results:

The integration and enhancements led to significant improvements in lead management and communication processes for Your Home Sold Guaranteed Realty, NCT. The bi-directional integration and automated processes reduced manual efforts and increased operational efficiency. Customized lead plans and automated transitions ensured timely and appropriate follow-ups, enhancing lead nurturing. Refined messaging protocols prevented inappropriate communications, maintaining professionalism and client satisfaction. Additionally, enhanced task generation and updates ensured that sales teams had accurate and timely information for follow-ups, improving overall workflow efficiency.