



Property Pals USA

CASE STUDY

LEFTMAIN REI CRM IMPLEMENTATION

Presented by

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Summary

Property Pals US embarked on an ambitious project to implement LeftMain REI CRM, aiming to streamline operations and enhance call management capabilities. However, issues with data synchronization, API connectivity, and consistency posed significant challenges. These issues hindered the seamless integration of Computer Telephony Integration (CTI), user dialpads, data accuracy, analytics precision, and third-party tools like CallRail via Zapier. As a result, effective call management and analytics capabilities were limited.

Challenges

The project faced several challenges:

1. **CTI Implementation:** Integrating CTI into the CRM system to enable efficient call management and tracking.
2. **User Dialpads Setup:** Configuring dialpads for new users and ensuring they had the appropriate permissions for seamless operation.
3. **Data Accuracy:** Capturing accurate call data to maintain high data integrity and reliability.
4. **Analytics Precision:** Ensuring that call data was precisely tracked and analyzed to generate meaningful insights.
5. **Third-Party Tool Integration:** Integrating external tools like CallRail through Zapier to enhance functionality and data management.
6. **Data Synchronization and API Connectivity:** Maintaining consistent data flow and connectivity across different platforms to prevent data discrepancies and integration failures.

Despite initial successes, these ongoing issues hampered the seamless flow of call data into the CRM system, compounded data accuracy concerns, and limited the effective use of external tools for enhanced call management and analytics.



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Solutions Implemented:

To address these challenges, several strategic solutions were implemented:

1. **CTI Configuration:** The CTI settings were meticulously configured, ensuring seamless integration into the CRM system. This facilitated efficient call management and tracking.
2. **Dialpad Integration:** Dialpads were integrated for new users, and permissions were set up to ensure smooth operation. This allowed users to manage calls directly within the CRM system.
3. **Report and Dashboard Development:** A comprehensive report and dashboard were developed to monitor inbound and outbound calls per user. This enabled real-time tracking and analysis of call activities.
4. **Call Timing Dashboard:** An additional dashboard was created to display call timings based on user activity. This provided insights into user performance and call patterns.
5. **Third-Party Application Integration:** Third-party applications such as call tools and CallRail were successfully integrated using Zapier. This enhanced functionality and data management, allowing for better call analytics and reporting.

By implementing these solutions, Property Pals US was able to overcome the challenges associated with data synchronization, API connectivity, and consistency. The integration of CTI, user dialpads, and third-party tools significantly improved call management and analytics capabilities, leading to enhanced operational efficiency and data accuracy.

Conclusion

The LeftMain REI CRM implementation at Property Pals US demonstrates the importance of addressing data synchronization, API connectivity, and consistency issues to achieve seamless integration and enhanced functionality. Through strategic configuration, integration, and the development of comprehensive reporting tools, Property Pals US successfully navigated these challenges, resulting in improved call management, data accuracy, and analytics precision. This case study serves as a valuable reference for similar projects aiming to optimize CRM systems and integrate external tools for enhanced operational efficiency.