



KRISHNAN TEAM

CASE STUDY: RUTH KRISHNAN TEAM

PREPARED BY

CLOUDSHARKS
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Introduction

In the fast-paced real estate industry, effective communication is key to maintaining stakeholder engagement and ensuring smooth transitions throughout the sales process. The Ruth Krishnan Team recognized the need for an automated email notification system to keep all relevant parties informed at crucial stages of an opportunity's lifecycle. This case study explores the challenges faced, the solutions implemented, and the outcomes achieved through the email notification automation project.

Project Overview

Objective: To implement a robust email notification automation system that schedules timely and relevant notifications for stakeholders, enhances engagement for referral opportunities, and celebrates key milestones with personalized messages.

Challenges:

The project presented several challenges that required innovative solutions:

1. Scheduled Notifications:

- **On Market Notifications:** Notify stakeholders two weeks after an opportunity goes 'On Market'.
- **Referral Engagement:** Send notifications at 2, 4, and 6 weeks for opportunities with a lead source marked as 'referral'.
- **Status Transition Alerts:** Notify relevant parties when an opportunity transitions to 'Active' or 'Pending Contract' status, with appropriate messages of thanks or congratulations. Specific agents needed to be excluded from these notifications.

Solutions Implemented

To address these challenges, the following solutions were put in place:

Scheduled Flows:

- **On Market Notifications:** A scheduled workflow was created to trigger notifications two weeks after an opportunity is marked as 'On Market'. This ensures stakeholders are kept in the loop about the property's status, enabling timely actions and decisions.

- Referral Engagement: Another set of scheduled workflows was designed for referral opportunities. Notifications are sent at 2-week, 4-week, and 6-week intervals to maintain engagement and keep the opportunity top-of-mind for all involved parties.
- Status Transition Alerts: Custom workflows were developed to notify relevant parties when an opportunity transitions to 'Active' or 'Pending Contract'. These notifications include personalized messages of thanks or congratulations, enhancing the sense of achievement and recognition. Specific agents are excluded from these notifications based on predefined criteria to ensure relevance and appropriateness.

Outcome

The implementation of these automated workflows has led to several positive outcomes:

1. Enhanced Communication:

- Stakeholders are consistently informed about the status of opportunities, reducing the need for manual updates and follow-ups.

2. Increased Engagement:

- Referral opportunities receive regular updates, keeping them engaged and motivated to follow through with the opportunity.

3. Celebration of Milestones:

- Personalized messages for key status transitions help in recognizing and celebrating milestones, fostering a positive and motivated team environment.

Conclusion

The email notification automation project for the Ruth Krishnan Team successfully addressed the challenges of maintaining timely and relevant communication throughout the opportunity lifecycle. By implementing scheduled workflows for 'On Market' notifications, referral engagement, and status transition alerts, the team has enhanced stakeholder engagement, ensured consistent communication, and celebrated key milestones effectively. This project demonstrates the value of automation in improving operational efficiency and fostering a motivated, well-informed team.