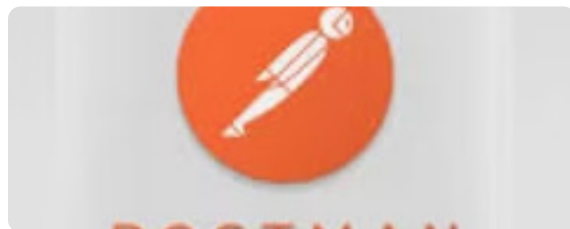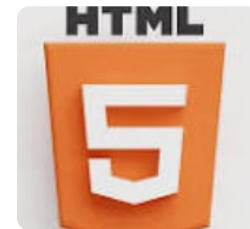# Case Study: Streamlining Property Management with Propertybase

Twopir provided Salesforce customization services to help the client develop a robust and an efficient third party integration along with helping in data management system

Tech Stack for Project Success

About the client

Dubai Sotheby's International Realty epitomizes a dedication to excellence and unparalleled service in luxury real estate. Specializing in prestigious properties in Dubai, this esteemed agency provides a robust marketing and selling platform for discerning international property connoisseurs.

Our solutions have significantly enhanced efficiency, accuracy, and communication within Dubai Sotheby's International Realty's operations, addressing critical challenges across various aspects of their real estate business. Each solution leverages technology and automation to optimize workflows, improve client interactions, and ensure compliance and transparency in transactions. This comprehensive suite of services demonstrates a commitment to driving value and success for our client in the luxury real estate market.

Inventory Management Solution

PROPERTY MANAGEMENT SERVICES

🎯Challenge : Challenges In Property Management: Overcoming Disorganization and Uncertainty

The client encountered challenges such as property inventory disorganization, fluctuating availability leading to overstocking or understocking, inaccuracies in listing management, market demand uncertainty, rising operational expenses, accountability deficits in management procedures, and declining customer service quality.

🛠️Solution : Developed an inventory management component with real-time updates and dynamic filtering for efficient property searches.

Improved unit status visibility (available, red-listed, on hold, sold).

Enhanced user experience and streamlined search process.

Provided personalized property recommendations.

Optimizing Lead Management and Sales Processes

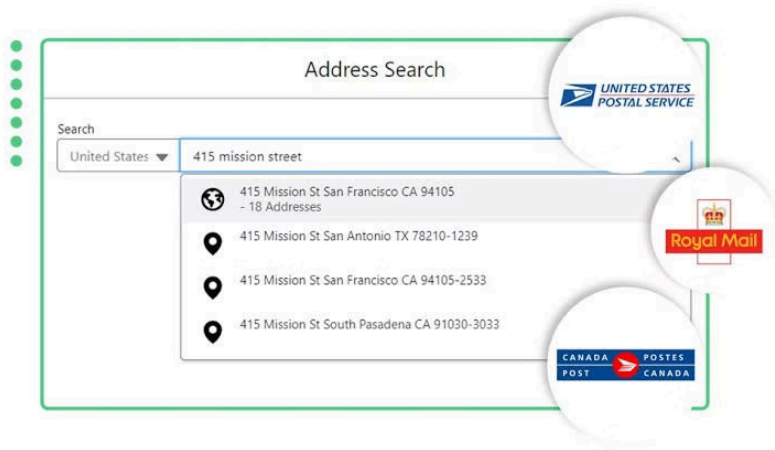## 🎯Challenge : Challenges in Inefficient Lead Management

The manual process of capturing and managing leads from various sources led to missed opportunities and duplicated efforts

🛠️Solution : Enhancing Lead Management Efficiency in Salesforce through Automated Routing

Automated Salesforce lead capture and routing, with customized reports and dashboards for real-time sales insights and enhanced visibility into pipeline and representative productivity.

Enhancing Real Estate Operations with Royal Mail Integration

🎯Challenge : Challenges in Address Verification And Client Communication

Manual address verification led to errors and inefficiencies. The lack of integration between mailing processes and Salesforce CRM caused disjointed workflows, challenges in maintaining client records, and hindered effective client communication, impacting the agency's reputation.

🛠️Solution : Enhancing Address Management and Communication with Royal Mail Integration

Integrated Royal Mail services into their Salesforce CRM platform, revolutionizing their address management and communication strategies. This integration provided automation for address verification, and elevating client communication standards.

Customer Information Form (CIF) Management

🎯 **Challenge: Organizing diverse contact information across multiple accounts and agencies is a daunting challenge for real estate agencies.**

Real estate agencies deal with numerous contacts associated with various accounts and agencies. Managing and organizing this information efficiently can be daunting, especially considering the diverse nature of clients and stakeholders involved.

🛠️ **Solution: Streamlining Contact and Account Organization with CIF Management**

We simplify the creation of CIF records by developing a custom form within Salesforce. Agents can input client details such as contact information, preferences, and requirements into the form. The data is automatically saved and used to generate CIF records in Salesforce, eliminating manual data entry and reducing the risk of errors.

CUSTOMER INFORMATION FILE

Document Generation and Signing Automation

Document Generation in Salesforce with **NINTEX** DocGen

PandaDoc eSignatures

🎯**Challenge : Document Generation and Signing Challenges for Efficient Deal Closure**

Challenges with manual document generation and signing processes caused inefficiencies, deal closure delays, and difficulties in tracking document progress. Visibility into document status and approval was lacking, leading to prolonged processes and increased error risks.

🛠️**Solution : Automating Document Generation and Signing in Salesforce**

1.We automated document generation by integrating Nintex with Salesforce. This eliminated the need for manual data entry, ensuring accuracy and expediting the process.

2.We streamlined document signing by integrating PandaDoc with Salesforce. Agents could send documents for electronic signature directly from Salesforce, track document statuses in real-time, and receive notifications upon completion.

Made with Gamma

Contract and Offer Management

🎯Challenge : **Challenges in Mitigating Risks in Transaction Documentation and In Offer Management and Communication for Agents and Clients.**

Challenges include heightened risks due to ineffective contract management, leading to miscommunication and errors in formalizing agreements. Agents also face difficulties in tracking offer details, maintaining communication with clients, and coordinating negotiations efficiently, while clients struggle with offer management.

🛠️Solution : **Enhancing Transaction Efficiency with Automated Contract and Offer Management**

We automated contract contact role generation upon contract creation and implemented email notifications at key stages.

And with the Offer object in Salesforce, we capture essential offer details and streamline negotiation processes using customized record types. Using Salesforce Flow, we automate offer-related tasks and notifications for timely follow-ups. Integration with a file management system simplifies document management.

AML (Anti-Money Laundering) Management

🎯Challenge : **AML Module Optimization and Digitization**

The client already had an AML module in place, but it required optimization and digitization. Previously, the AML process was outdated, lacking an approval process and leaving compliance gaps in property transactions

🛠️Solution : **Optimized Salesforce AML system with automated processes**

We improved their Salesforce AML system by automating processes with custom buttons, setting up AML scoring based on specific KYC parameters, and linking AML record creation to transaction currencies for precise risk assessments. We integrated automated transaction monitoring and enhanced customer identification by verifying identities through trusted sources, including government-issued IDs. Validation rules were implemented to ensure AML checks are completed before transactions proceed, and automation triggers streamlined AML status updates and notifications for efficient compliance with internal policies and regulations.

Closing Commission Management

🎯 **Challenge : Commission Management Challenges : Transparency, Reporting, Forecasting, Compliance, Broker Performance, and Sales Strategy Clarity.**

Clients faced challenges in closing deals due to inadequate commission management in Salesforce, resulting in transparency issues, reporting difficulties, inaccurate forecasting, disputes, and compliance risks for real estate agents.

🛠️ **Solution : Streamlined closing commission management with transparent insights, automated generation, and centralized tracking for efficiency and data integrity.**

We developed a comprehensive closing commission module for external and resale broker agents, providing transparent insights into commission frameworks and automating commission generation upon contract verification within Salesforce. This solution ensures meticulous tracking of commission details and offers centralized management, enhancing transparency and efficiency while maintaining data integrity through validation rules and automation.
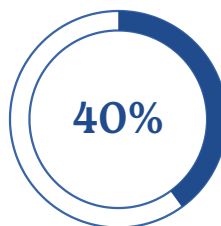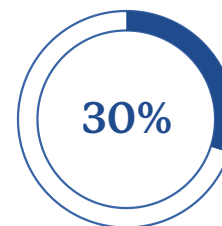

COMMISSION

Results
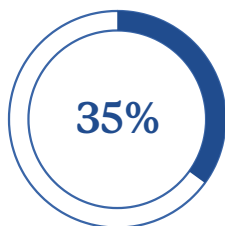
35%
Efficiency Increase

Automated provisioning slashed errors, sped up onboarding by 35%.
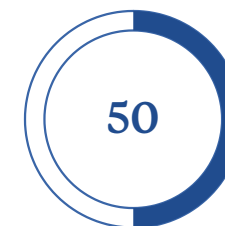
40%
Productivity Boost

Streamlined workflow led to 40% productivity boost; automated system rapidly scaled, creating thousands of subscribers effortlessly.

30%
Integration Efficiency

Sophisticated integration boosted efficiency by 30% with seamless connectivity to billing, CRM, and network management systems.

50
Speed Enhancement

Advanced methods led to 50% faster subscriber provisioning, enhancing service delivery for increased customer satisfaction and loyalty.

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Our Partners

We are esteemed partners of best AppExchange products. This provides us an edge and access to partner ecosystem that are designed to support and help customers in their complex business needs.

Testimonials

– Vice President, Sales & Marketing

TwoPir Consulting is a hard working company, really knowledgeable, and always ready to do the extra mile to support me. they are really good at communicating and deliver on time and on budget. Bravo.

– Senior Marketing Executive

Upon meeting the team, I checked references and received high praise. With extensive Salesforce experience, I confidently affirm TwoPir Consulting's excellence. They swiftly crafted a custom forecasting solution, despite vague specifications. Working tirelessly, they ensured project success and provided invaluable assistance. Their coding is top-notch, and they've adeptly refined our Salesforce setup. Trust your project to Team for exceptional results.

– Founder

This was my first outsource project and I was skeptical at first as to what would happen. The experience has been terrific. Gopal helped to set schedule. Gopal's work was excellent. He is very knowledgeable in SalesForce and cleverly resolved my needs to customize the program. I certainly look forward to continuing to work with Gopal in the next stages of improving my customization.

For more information ,contact support@twopirconsulting.com

Thank you for your interest in TwoPir Consulting Pvt Ltd. To learn more about our services and how we can elevate your Salesforce experience, please get in touch with our team. We are here to answer any questions you may have and provide tailored solutions to meet your unique business needs. Reach out to us today!

Visit our website: www.twopirconsulting.com   Call us : +917420894628

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