



Salesforce Implementation Case Study: Real Estate Industry

Client Overview:

Our client is a rapidly growing conglomerate headquartered in a major metropolitan city, known for its innovative approach in the real estate sector. They are among the top property developers in their region and have expanded their presence into multiple states. With a dedicated team, the company quickly rose to prominence in the market.

Business Challenges:

1. **Low Visibility & Outdated Legacy System:** The legacy system lacked dashboards and real-time reports, limiting sales performance and pipeline tracking visibility.
2. **Lead Leakage from Multiple Channels:** Leads from social media, Google Ads, and third-party providers were often missed due to a lack of integration.
3. **No Lead Deduplication:** Duplicate leads were common, confusing, wasted effort, and a poor customer experience.
4. **Disjointed Lead Pool & Assignment:** Leads were scattered with no centralized pool or automated assignment to the right sales executives.
5. **Missed Follow-Ups & No Reminders:** Sales reps lacked tools to schedule follow-ups, leading to missed opportunities and inconsistent engagement.
6. **No Lead Classification:** All leads were treated equally, with no system in place to classify them based on interest level or buying capability.
7. **No CTI & Call Tracking:** Incoming calls and missed calls weren't logged; call recordings and histories were unavailable to the team.
8. **Duplicate or Unmanaged Bookings:** Multiple bookings occurred for the same unit due to a lack of a centralized booking and availability system.
9. **Incomplete Project & Unit-Level Information:** Project and unit details, including amenities and configurations, were not properly structured or accessible.

CONCLO Technologies Solution:

CONCLO TECHNOLOGIES



1. **Real-Time Dashboards & Reporting:** Implemented Salesforce dashboards and reports for live sales tracking and management visibility.
2. **Integrated Lead Capture:** Connected all lead sources like social media, Google Ads, and third-party portals directly into Salesforce.
3. **Lead Deduplication Logic:** Set up rules to identify and merge duplicate leads automatically, ensuring data cleanliness.
4. **Centralized Lead Pool & Auto Assignment:** Created a shared lead pool and built automated assignment flows based on rules like location and availability.
5. **Follow-Up Reminders & Task Management:** Enabled task scheduling, calendar alerts, and automatic reminders for timely follow-ups.
6. **Lead Classification:** Introduced lead classification to categorize leads by buying intent, budget, and engagement level.
7. **CTI Integration for Call Management:** Integrated a CTI system to log incoming/missed calls, store recordings, and track call history per lead.
8. **Custom Booking Management Module:** Developed a booking engine to manage unit availability and prevent duplicate bookings.
9. **Structured Project & Unit Setup:** Built a hierarchy for project > tower > unit, with all features, pricing, and amenity details captured.

Conclusion:

By implementing a tailored Salesforce solution, CONCLO Technologies helped the client overcome critical sales and operational challenges in the real estate domain. The system streamlined lead management, improved sales team efficiency, and provided full visibility into bookings and customer interactions. As a result, the client experienced faster conversions, reduced lead leakage, and a more professional, data-driven approach to sales and customer engagement.