

Revolutionizing Client Matching in Real Estate with Salesforce High – Velocity Sales



salesforce

Overview

See how a leading real estate agency modernized its lead qualification and engagement strategy with Salesforce High-Velocity Sales.

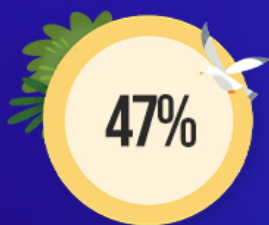
Why This Matters for Other Businesses

Real estate agencies often deal with unfiltered lead inflow, inconsistent agent follow-ups, and limited visibility. These inefficiencies lead to lost deals and burnt-out sales teams. A well-structured cadence system can turn that around.

How Synexc Helped

Synexc helped the client streamline its lead management process and increase sales conversion rates by implementing a High-Velocity Sales strategy with SF Sales Cloud and Sales Cadences.

Key Improvements



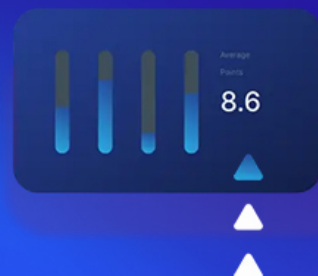
rise in conversion
rate for qualified
leads



drop in average
sales cycle time



increase in
agent productivity



About the Client

Our client is a well-established real estate agency operating primarily in the metropolitan areas of Bangalore and Chennai, India. They specialize in both residential and commercial properties, catering to a diverse clientele ranging from first-time homebuyers to largescale investors.

Their core business operations include property listings, buyer/tenant representation, seller representation, and property management services.

Challenges Faced by the Client

Challenge 1



Lead Volume with No Filtering

Agents were wasting time combing through bulk leads from multiple channels, many of which weren't sales-ready.

Challenge 2



Inconsistent Follow-ups

Without structured reminders or workflows, valuable prospects often slipped through the cracks during the follow-up stage.

Challenge 3



Lack of Insight into Buyer Intent

With no systematic approach to understanding preferences, outreach remained generic and often missed the mark.



Solutions Offered



Lead Assignment Configuration Based on Agent Strengths

Rather than sending leads to a general queue, we set up lead routing rules based on region, property type, and agent specialization.



Building A Lead Scoring System to Prioritize High-Intent Buyers

We implemented a lead scoring model within Salesforce to flag serious buyers who've viewed properties multiple times, responded to emails, or submitted inquiry forms.



Designing Sales Cadences to Mirror Agent Follow-Up

We co-designed outreach steps with the agents themselves and embedded these into Salesforce Sales Cadences for agents to keep track.



Salesforce Integration with Property Listings

Connected Salesforce to their property listings database so that when a new lead comes in, Salesforce instantly surfaces 3-5 matching properties.

Solutions Offered



Addition of Personalized Email Templates for Property Sharing

Added a set of dynamic templates for each agent to send personalized emails, automatically populated with client name, location, interest, and relevant properties.



Built Automation to Streamline Task Management

We set up automation to handle common grunt work such as call reminders, email followups, and cadence step tracking.



Built Dashboards for Real-Time Monitoring

Developed a custom dashboard for Sales managers to have real-time visibility into which leads are being worked on and which cadences are performing.



Mobile-Optimized Setup for On-the-Go Agents

Optimized for Salesforce's mobile app so that agents can check lead history, send property suggestions, or update follow-ups between site visits.

Results



Better overall buying experience.



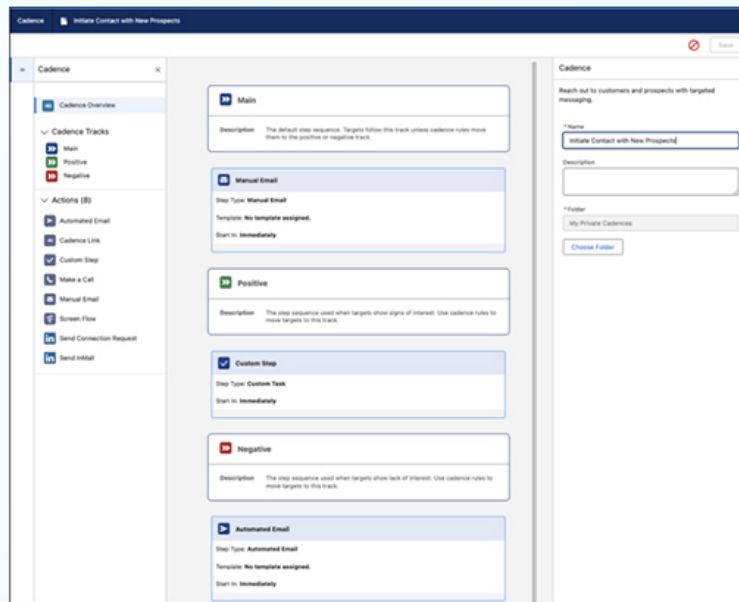
Reduced burnout in agents and increased win rates.



End-to-end visibility for sales management



Improved forecast accuracy and operational planning



Client testimonial

"Thanks to the sales cadences, our team doesn't miss follow-ups anymore. It feels like we finally have a process that scales with us."

Vikram S.

Sales Director

About Synexc

Synexc is a new-age Salesforce consulting company specializing in CRM implementation, custom development, system integration, and AI-powered solutions. With clients across the US, Europe, and APAC, we are fast emerging as a global hub for delivering scalable, secure, and business-aligned Salesforce solutions tailored to industry-specific needs.

**Reach out to us for a
Free Consultation Now!**

