

CASE STUDY

AI-Powered SmrtPhone SMS Automation in LeftMain REI CRM

*Transforming Lead Engagement with Salesforce,
smrtPhone & ChatGPT AI*



Project Overview

A real estate investment firm operating across multiple U.S. counties, specializing in cash-based residential home buying. With a strong value system focused on loyalty, community, and tailored seller solutions, the client handles high volumes of homeowner leads via digital channels.

Challenges

The client was facing key friction points that limited lead engagement scalability:

- Manual handling of hundreds of SMS conversations weekly
- The existing Salesforce + smrtPhone system lacked AI automation
- Need for real-time, human-like replies to inbound seller queries
- Difficulty maintaining conversation context in long SMS threads
- High operational load with slow response turnaround
- Required native integration without disrupting the current CRM setup
- Desire for a cost-effective, scalable, and easy-to-maintain AI solution

The Sales Process

The client's sales team starts with gauging the seller's intent via SMS. The goal is to move leads from inquiry to an appointment for a first-level introductory call with a real estate investor.

CloudSharks' AI Automation Solution

To meet the client's need for humanised, scalable, and cost-efficient AI messaging, CloudSharks engineered a robust solution using existing Salesforce and smrtPhone infrastructure:

Incoming SMS Detection

- SMS received via SmrtPhone app is logged in Salesforce.
- Each message creates a task associated with the relevant lead/contact.

AI Response Generation via ChatGPT

- Incoming messages are sent from Salesforce to ChatGPT via Zapier.
- A trained AI Assistant processes the full conversation to generate a relevant, human-like SMS reply.

Response Loop Automation

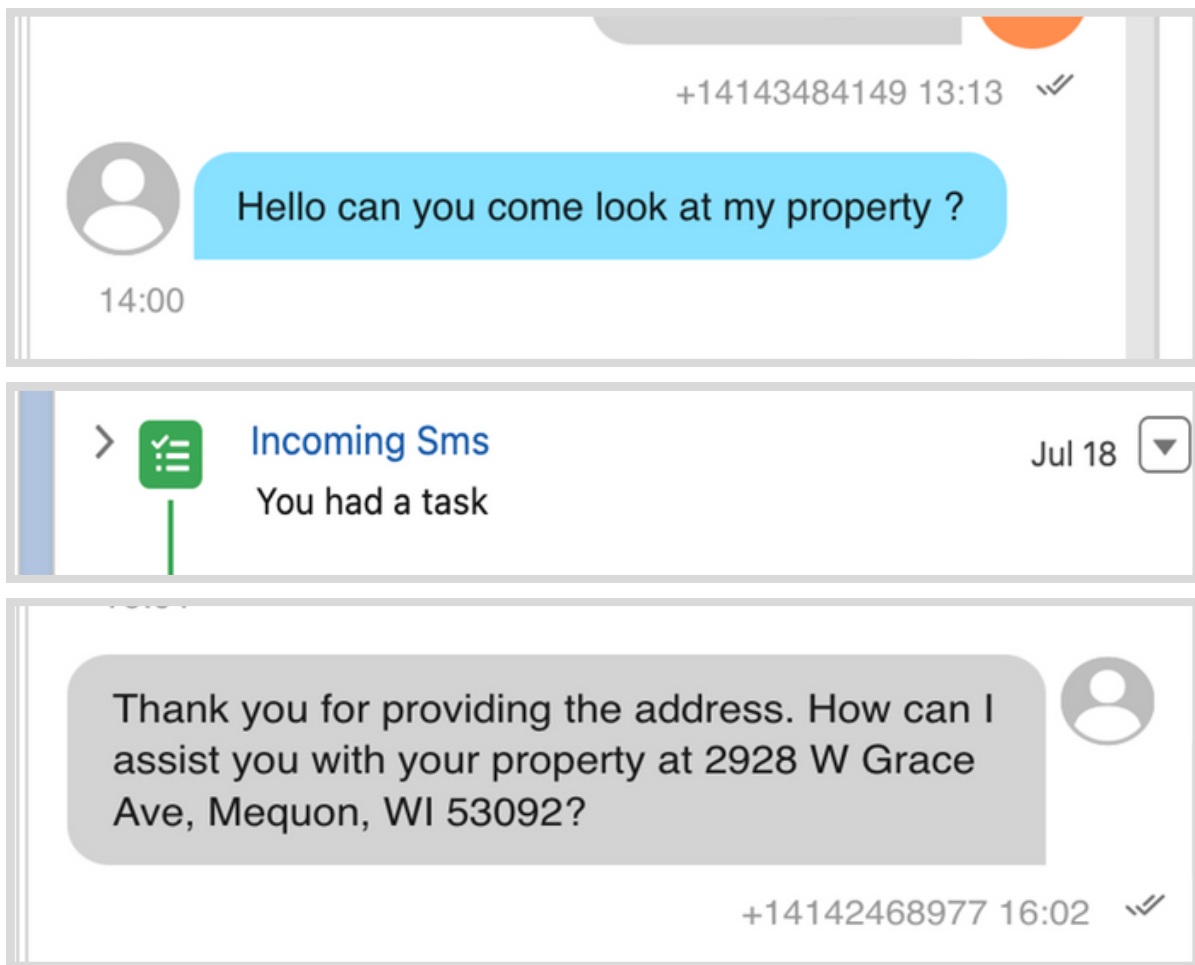
- AI-generated SMS is sent back to Salesforce.
- Outgoing response is recorded as a task and sent automatically to the lead's mobile number.

Contextual Memory Through Custom Object

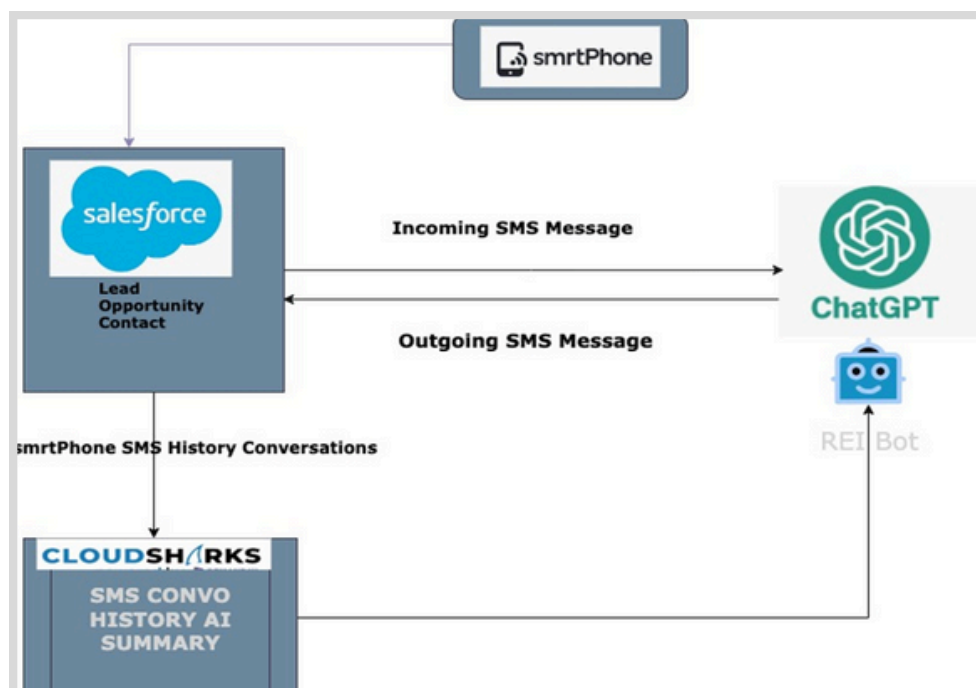
- All SMS conversations (inbound + outbound) are stored in a custom Salesforce object:
- CloudSharks Convo AI Summary (CSConvoSummary).
- This historical data improves AI understanding and future responses.

User Override Flexibility

- While automated, users can override and customise replies manually when needed, retaining full control.



Architecture Diagram



Immediate Results

- ✓ 85% faster response time to inbound lead queries
- ✓ 24/7 engagement with seller leads, zero manual delays
- ✓ Higher trust and conversion from more human-like AI replies
- ✓ Native CRM integration, no disruption to existing tools
- ✓ Custom control remains in the user's hands when needed
- ✓ Increased lead retention and engagement rates

"At CloudSharks, we transform complex CRM workflows into intelligent, always-on systems—bridging automation with human insight to scale what matters most."