



AI-Powered Real Estate Customer Engagement & Intelligent Growth

From Data to Insights to Impact — Drive More Leads, Better Engagement and Higher ROI

Powered by: Sales Cloud + Data Cloud + Marketing Cloud + Personalization + Intelligence + Service Cloud + Tableau



9-Stage
Unified Customer Journey



360°
Customer & Prospect View



Multi-Channel
Email, WhatsApp & Digital



Real-Time
KPI & ROI Tracking

THE CHALLENGE

- **High volumes** of leads and interactions across projects and digital touchpoints
- **Fragmented** customer, marketing, sales, and service data across platforms
- **Manual** lead qualification, assignment, follow-up, and nurturing
- **Limited visibility** into campaign performance and marketing ROI

THE AI SOLUTION

- **Data Cloud** unifies customer, prospect & engagement data into Customer 360
- **Marketing Cloud** delivers personalized, automated omnichannel journeys
- **Personalization** drives realtime, behavior-based experiences
- **Service Cloud** connects postsales support with full interaction history
- **Tableau** powers executive dashboards and drill-down analysis

KEY DIFFERENTIATORS

- **Unified** Real Estate Customer Intelligence
- **Intelligent Lead Lifecycle:** scoring, nurturing, assignment
- **Personalized** omnichannel engagement (Email, WhatsApp)
- **Real-time** experience personalization
- **Executive visibility** via Tableau dashboards
- Future-ready foundation for **AI & Agentforce**

WHAT THE AI DELIVERS

Operational Outcomes

- **Improved** lead quality and prioritization
- **Faster**, more consistent lead follow-up
- **Reduced** manual marketing and sales effort
- **Improved** post-sales service productivity

Financial Outcomes

- **Higher conversions** through targeted journeys
- **Improved ROI** measurement and optimization
- **Reduced** manual support and operational effort
- Stronger marketing performance & ROI visibility

Strategic Outcomes

- **360° visibility** of customers, leads & engagement
- **Data-driven** decisions across projects & teams
- Stronger alignment between marketing & sales
- Scalable foundation for **AI powered engagement**

IDEAL FOR

Residential Real Estate

Commercial Real Estate

Real Estate Developers & Groups

Property Management & Construction

NEXT STEPS

Step 1: Unify Customer Data (Weeks 1–4) – Connect CRM, digital, and engagement data into a single Customer 360 via Data Cloud.

Step 2: Activate Personalized Engagement (Weeks 5–8) – Launch segmented, omnichannel journeys across Email, WhatsApp & digital touchpoints.

Step 3: Scale to AI & Agentforce – Extend the unified foundation into intelligent, conversational customer engagement.

