FORSYS
Forward Thinking

50% Shorter Sales Cycle & 70% Better Decision-Making with Forsys' Custom Salesforce Sales Cloud Solution for a Premier Real Estate Company

Insight

The client, a premier luxury real estate business, faced multiple challenges due to the absence of a centralized system to manage customer interactions, inquiries, and sales processes. They struggled with disorganized customer data, manual sales operations, and limited visibility into their sales pipeline, property data management, and the effective tracking of payment milestones.
Forsys custom-designed a CRM solution using Salesforce, enabling the client to seamlessly integrate their website for inquiry capture, centralize data, and streamline their sales pipeline with real-time tracking. The tailored solution also enhanced presales management, improved customer relationships, and facilitated social media inquiry capture. Additionally, Forsys implemented features such as property grid views, milestone-based quotations, task management, and financial visibility through booking and payment tracking. As a result, the client witnessed a 50% reduction in sales cycle time, 80% improvement in document management for proposals (quotes) and payment demand letters, and a 70% enhancement in payment scheduling and tracking.

	Industry		Revenue		Employees		Headquarters
	Real Estate		$475K-$590K		10-50		Telangana, India

Business Challenge

The real estate business encountered a series of challenges due to the absence of a unified platform to streamline their client and sales management. Their manually-driven processes like spreadsheets and emails resulted in inefficiencies, errors, and consistent delays in the creation of quotations and tracking payment milestones.

Here are several challenges the client faced:

- Limited sales pipeline visibility caused missed follow-ups and forecasting inaccuracies.
- Difficulty tracking sales stages delayed high-value property deals.
- Manual lead and opportunity handling led to inconsistencies.
- Disconnected systems hindered team collaboration and workflows.
- Lack of centralized customer history restricted upselling and cross-selling insights.
- Missing historical data analysis resulted in poor sales forecasting.

- Complex quote creation and payment scheduling processes added inefficiencies.
- Manual property availability checks were time-consuming.
- Scattered multi-channel inquiries caused frequent missed follow-ups.
- Absence of task management disrupted consistent customer engagement.
- Tally usage created workflow gaps and limited operational oversight.

Transformation Journey

Forsys leveraged its end-to-end Salesforce expertise to design and implement a customized CRM solution that ensured all the unique requirements of the client were met and challenges were addressed.

Here are the key highlights of the transformation journey:

- ☑ Consolidation of sales & customer data for improved visibility and management.

- ☑ Integration of the website with Salesforce for automated inquiry tracking.

- ☑ Streamlining of lead tracking for efficient follow-ups & prioritization.

- ☑ Automation of tasks to enhance customer engagement & timely actions.

- ☑ Creation of property views to simplify customer selection.

- ☑ Automation of quotations with milestone-based payment schedules.

- ☑ Synchronization of financial workflows with payment tracking and reminders.

- ☑ Enablement of sales pipeline insights for improved deal progression.

Impact

50%
reduction in sales cycle time.

70%
improvement in decision-making.

80%
better document management for proposals (quotes) & payment demand letters.

70%
improvement in payment scheduling & tracking.

About the Client

The client is a real estate company renowned for designing luxury homes that seamlessly blend beauty, comfort, and connectivity. Their flagship project embodies sustainable living with eco-friendly energy solutions and advanced green building technologies.

Solution Components

Salesforce Sales Cloud-Enterprise Edition, Product Categorization, Custom Properties Grid Views, Automated Quote Management, Payment Scheduling