



70% Sales Efficiency Improvement via Workflow Automation with Salesforce Sales Cloud for a Construction Firm



Insight

A prominent real estate developer faced considerable operational hurdles, such as manual sales processes, disintegrated property management, and siloed customer data. These caused delayed responses, slower deal closures, and reduced visibility into property status for the client.

Forsys transformed the client's operations by implementing a tailored Salesforce Sales Cloud solution, streamlining everything from inquiry handling and quotation generation to real-time property management. This shift resulted in a 50% reduction in the sales cycle, a 70% decrease in manual tasks, and 70% faster quote generation.



Industry
Constructions



Revenue
~ \$1.2 M



Employees
11-50



Headquarters
Andhra Pradesh,
India

Business Challenge

For the client operational excellence and delivering world-class customer satisfaction were critical to their growth story. However, the company was struggling with several operational challenges, such as outdated and fragmented sales processes that hampered efficiency and made it difficult to manage sales seamlessly and provide a smooth customer experience.

These issues led to the following challenges:

- Fragmented inquiries management, customer interactions, & property listings (number of available flats by floor, flat-facing orientation (e.g., east-facing, north-facing), and the type of flat (2BHK or 3BHK) due to the use of rough notes, Excel sheets, and emails
- Disintegrated customer & sales data made tracking of sales performance & customer interactions non efficient
- Manual quoting and sales reporting processes, resulting in errors and delays in sales cycle
- Inconsistent sales practices and data accuracy, causing visibility issues in the overall sales pipeline
- Lack of a property management system to effectively manage the sales and booking status of properties (e.g., available, booked, sold, mortgaged)

Transformation Journey

Forsys initiated the transformation journey for the construction company with a detailed project kickoff. This was followed by requirement gathering sessions and workshops to dive deep into the client's business processes, identifying existing pain points and operational inefficiencies.

Here are the key highlights:

- Implementation of Salesforce Sales Cloud (Enterprise Edition) to streamline the sales process.
- Automation of inquiry management, customer accounts creation, opportunity tracking, and quote generation directly within Salesforce.
- Development and deployment of a custom grid view for real-time property management, with filters for flat-facing orientation and type.
- Migration of legacy data to Salesforce, centralizing customer and sales information and eliminating manual tracking.
- Automation of quote generation, enabling the system to automatically generate and send quotations to customers once a property was finalized, thereby speeding up the sales cycle and reducing errors.
- Digitization of sales reporting and individual and team performance tracking, providing real-time insights and improving business performance.
- Seamless integration of Salesforce Sales Cloud with:
 - Facebook and Instagram: for management of customer inquiries and lead generation from social media platforms.
 - Web to Lead (Website): for automation of lead capturing from the company website to ensure on-time follow-up
 - SMS 360 (CTI and WhatsApp): for carrying out integrated communication via calls and WhatsApp messages for improved customer engagement and streamlined interactions.
 - 99 Acres and Magicbricks (Marketplace): for enhanced marketplace management to enable quicker property listings and lead tracking.
- Execution of user acceptance testing (UAT) post-implementation of Salesforce Sales Cloud.

Impact

- ✓ **50% reduction in the sales cycle**
- ✓ **70% lesser manual tasks**
- ✓ **70% improvement in property status visibility**
- ✓ **50% faster response times on deal updates**
- ✓ **70% faster quote generation**
- ✓ **Faster deal closures & decline in administrative time**
- ✓ **50% improvement in data accuracy**
- ✓ **Fewer data entry errors**
- ✓ **50% decrease in time spent generating reports**

About the Client

The client is a well-reputed real estate developer based in Visakhapatnam, Andhra Pradesh. They have consistently captured the ideas and visions of people in their housing projects, known for exceptional space planning and architectural expertise. In most of their development projects, they have exceeded clients' expectations in terms of quality, safety, functionality, and aesthetics, delivering assets that stand the test of time.

Solution Components

Salesforce Sales Cloud - Professional Edition, Property Management System (Property GridView - Real Estate Package), Custom Quotation Templates, Customized Reports & Dashboards