

# Customer Success Story

## CUSTOMER SIZE:

2 - 10

## INDUSTRY VERTICAL:

Real Estate

## SALESFORCE PRODUCTS:

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## INTEGRATIONS:

Web-to-lead

## ENGAGEMENT LENGTH:

2 Months

## Efficient Lead Capture to Opportunity Closure – Raivat’s Digital Shift



Raivat Property Advisory LLP, is a property consultant; they are grounded with good knowledge and experience in real estate; who connect with a large number of people and including developer, property owner, buyers, brokers, etc and keep themselves updated with current market trends. They are well versed with the law of the land and can help you complete legal formalities without any hassle.

### Original Challenge

They needed a centralized system to manage leads from multiple sources, including websites, micro-sites, and third-party platforms like MagicBricks and Sulekha. They required Web-to-Lead implementation and training for their developers to support future site integrations. Their sales structure involved managers handling high-value clients and agents managing the rest, necessitating role-based access, opportunity tracking, site visit logging, and commission monitoring.

### Outcome #1

Implemented Web-to-Lead and proposed Email-to-Lead to capture leads from various sources. Lead queues, assignment rules, and alerts were configured for timely follow-ups. A Property Master was set up to manage key property and developer details.

### Outcome #2

We streamlined lead-to-opportunity conversion with clear stages, validations, and categorization. Opportunity pipelines, alerts, and role-based access were established. Security needs were addressed through role hierarchies and sharing settings.