

Organization Profile: The client is a Property Developer in the Emirate of Sharjah with their objective to deliver communities and inspiring living spaces.

Business Challenge: The customer was using Excel with disjoint applications to maintain Customer data and Property Sales data. Their call centre operations were performed on another application and their data was distributed across all these software applications.

The core business of the client is to curate a master development and sell properties, for which, they wanted to implement a Property Sales Management solution.

They were looking for a solution that can help them manage their Leads, Opportunities and Customers in a single system that had the functionalities to quote, sell and offer post-sales support on their properties.

The Call Center department wanted the leads and phone calls to be tracked properly which will help them to assign the calls to the sales team to nurture and win business.

Contract Creation, Renewals, Termination, Unit Transfer was also important for them as this was taking a lot of time due to disjoint applications.

Industry: Real Estate

Country or Region: UAE

According to CRM Buyer report, real estate sees the biggest demand for an industry-specific CRM. 72% of prospective CRM buyers use manual methods to manage their customer relationships. 80% of leads are either lost or never followed up because no proper documentation was created for them.



Built on the Microsoft Dynamics platform, Property 365 is an all-in-one solution that lets you automate and streamline your full cycle of property management including sales, leads, rental, marketing, facility and mall management.

Modules Implemented: -

- Lead Capture through websites
- Lead nurturing and call centre management
- Property sales and commissions
- Brokers onboarding, management and Broker commissions
- Contracts and Land Department registration processes
- Collection and clearance
- Post Sales Processes

Solution Implemented: -

Property 365 on Dynamics 365 for Sales and Customer Service

Solution Devised:

To cater to the client's requirement, Levtech administered a solution that had a customer-centric approach, streamlined their property sales, marketing, post-sales and service process which further helped to improve their brand image, efficiency and ensured effective collaboration between departments.

End to End solution was proposed that took care of leads, contracts, payments to PDC management. This helped the client to manage their day to day inquiries, follow-ups, customer preferences, update property information and streamline sales processes.

With Dynamics 365 being tightly integrated with O365 and being available on their mobile, they could get all the information at their fingertips.

The solution also helped to maintain and track contract receivables and actual receipts. It enabled PDC management – Collections, Submissions, Cancellations, and Re-Submissions. The solution also has functionalities for customer payments, settlements and discounts on early payments.

To solve the problem of their Lead Management, Property 365 helped to capture prospect information and lead source. It performed duplication to identify whether the lead/inquiry is from an existing customer. Further, it helped in retrieving property references and shortlist units. In addition to this, the solution also enables the customer's sales team to perform timely customer/prospect follow-ups.

For monitoring the efficiency of their post-sales processes, Property 365 helps in upgrading or downgrading a unit. It manages amendments to a contract, add/remove the joint owner. Apart from this, it also performs document checklist and approval processes on post-sales transactions. The solution also enables the tracking of legal disputes and aids sales contract cancellation process.

Overall, we implemented a solution that managed their end to end business processes that included presales, operations, post-sale services, marketing activities, customer service and call centre.

Benefits: -

- The use of paper and Excel sheets had been reduced drastically across various departments, thereby reducing the overheads of managing and distributing Excel files.
- The solution promoted single source of truth which has improved productivity by reducing data dissimilarities
- All users that have access to Property 365 can see the data in the system based on their roles and permissions assigned.
- All approvals have been streamlined and made available through the system, which avoided delays in getting approvals from Line Managers and Senior Management.
 - Overall productivity and efficiency of users had increased.

About Levtech Consulting

Levtech Consulting, a RIB company, is a leading technology consulting firm servicing organization through delivering best-of-breed business solutions and industry-specific consulting services. Founded in 2009, Levtech operates from offices in U.A.E., Qatar, Saudi Arabia and India. Driven by a strong management team with diverse industry experience, the practice consists of some of the finest talent in the areas of Business Consulting and Project Management for Enterprise Applications. With a team size of over 250+ consultants, we have helped over 200+ customers transform their business globally.

Solutions provided by Levtech Consulting include Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), Human Resource Management System (HRMS), Business Intelligence (BI), Analytics & Mobility.

For more information, please visit <http://levtechconsulting.com/>