



Leading Qatar Real Estate Developer Elevates Sales and Service with Advanced Property Management Solution



The client, a key real estate developer in Qatar and part of the Qatar Foundation, is known for sustainable, innovative projects aligned with Qatar's 2030 Vision.

They previously used the CAEMS property management application for leasing and customer service, but its lack of CRM features resulted in poor lead tracking and customer interaction management. This required manual entry of lead details from phone calls. Additionally, the system didn't integrate with existing customer data or offer key features like milestone tracking and activity logging.

To elevate the client's sales and customer service operations, LevelShift integrated Salesforce into its operations. Our team of experts built the property management solution from the ground up, leveraging the features of Sales and Service Cloud.

This solution streamlined lead conversion and property management processes, automated manual tasks, established seamless communication channels, and delivered a cohesive customer experience.



What LevelShift Did



1. Lead-to-Opportunity Conversion

- **Omnichannel integration:** Integrated various communication channels, including CTI, WhatsApp, email, and web-to-lead, into a centralized CRM.
- **Streamlined lead creation:** Lead creation was simplified with a comprehensive view of the customer journey and integrated with various channels to ensure no missed opportunity.
- **Lead data management:** Centralized lead data in a CRM, which allows for streamlined tracking, management, and follow-up.
- **Comprehensive milestone tracking:** Sales Cloud enables tracking every step, from lead creation to opportunity conversion, with activities monitored to achieve each milestone.
 - Lead follow-up: New leads are assigned to the next available sales rep for follow-up within 48 hours.
 - Appointment schedule: The sales rep evaluates the lead's requirements, makes calls, and schedules property visits in Salesforce.
 - Opportunity management: Following the property visit, the sales rep emails a predefined quotation template to the interested lead.
 - Contract finalization: Once the lead approves the quotation, the contract operations prepares and executes the contract.



2. Service Request Management:

- **Multi-Channel access:** Customers can now register their cases through various channels, including CTI, chatbots, WhatsApp, and SMS.
- **Service request creation:** Generate service requests (SR) swiftly and accurately by utilizing pre-populated customer data.
- **Service Cloud excellence:** Implemented Service Cloud for streamlined customer service management, including case management and customer interaction tracking. Service reps expedite case resolution by recommending relevant knowledge articles to customers, based on similar past cases.
- **Self-service portal:** Customers can easily submit service requests via the self-service portal while being guided by an intuitive chatbot. This feature plays a key role in ensuring quick issue resolution and a seamless customer experience.



3. Property Management:

- Preventive maintenance scheduling: Automated schedules were created for regular maintenance tasks, generating reminders for routine inspections.
- Reactive maintenance workflow: Service requests were quickly assigned to technicians based on their availability and expertise, ensuring prompt resolution.
- Escalation protocols: The property management solution enabled automated ticket escalation, which resulted in the timely resolution of issues.
- Automated ticket assignment: Tickets were automatically categorized and assigned to team members, which streamlined the workflow.
- Role-based coordination: Defined roles for CSR, supervisors, technicians, help desk teams, storekeepers, and tenants, integrating them for improved coordination.
- Inventory management: Implemented an automated inventory system to track maintenance supplies and spare parts. This provided real-time stock updates and was managed by a storekeeper for timely replenishment.



“ The Salesforce implementation project for the client is strategic move to enhance sales and customer service operations. By leveraging Sale and Service Cloud capabilities, the client improved operational productivity, and enhanced customer satisfaction.”

Business Benefits



enhancement in lead conversion rates



improvement in first response time



boost in Salesforce adoption



reduction in document onboarding time



second service request creation, lightning-fast

Powered by



Sales Cloud



Service Cloud