CRM Lead Management using Sell.Do

Real Estate Pre-Sales & Customer Relationship Management

Portfolio Case Study

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Role: CRM Executive | Pre-Sales Executive | Customer Relationship Management

Project Overview

This project showcases my experience managing customer leads and supporting pre-sales operations using Sell.Do CRM for a premium residential real estate project. My responsibilities included maintaining accurate customer records, tracking the complete lead lifecycle, coordinating with the sales team, scheduling site visits, and preparing reports that supported smooth sales operations. Working in a fast-paced environment strengthened my organizational skills, customer communication, and ability to manage multiple priorities while ensuring every prospective customer received timely follow-up.

Project Information

Category	Details
Industry	Real Estate
Department	Pre-Sales & CRM

Category	Details
CRM Platform	Sell.Do CRM
Role	CRM & Pre-Sales Executive
Duration	During my tenure at Jinraj Real Estate
Lead Sources	Meta Ads, MagicBricks, Housing.com, 99acres, Walk-ins, Referrals

Business Challenge

A large number of customer inquiries were received daily through different online and offline channels. Managing these leads efficiently was essential to ensure no potential customer was missed and every inquiry received timely attention.

The objective was to:

- Maintain an organized CRM database.
- Ensure timely lead allocation.
- Monitor customer follow-ups.
- Coordinate site visits.
- Support the sales team with accurate information.
- Maintain high-quality customer communication.

My Responsibilities

CRM Management

- Created and updated customer records in Sell.Do CRM.
- Verified customer information and intent.
- Maintained complete lead history and communication logs.
- Updated lead stages after every interaction to reflect current status.

Lead Coordination

- Assigned qualified leads to sales executives via round-robin rules.
- Coordinated between marketing and sales teams to bridge the gap.
- Ensured prompt follow-up on new inquiries to reduce latency.
- Scheduled customer appointments and property site visits.

Customer Communication

- Assisted customers with project-related information and inquiries.
- Recorded detailed customer requirements and preferences.
- Maintained professional communication history across multiple channels.
- Ensured a professional and seamless customer experience.

Reporting

- Prepared weekly lead performance and marketing quality reports.
- Updated inquiry status and monitored pending follow-ups.
- Maintained accurate CRM data for management ROI assessment.

Lead Management Workflow

1. **Marketing Campaigns:** Leads generated via Meta Ads, Property Portals (MagicBricks, 99acres), and Walk-ins.
2. **Customer Inquiry:** Captured via API or manual entry with correct source tagging.
3. **Lead Verification:** Initial validation of contact details and customer intent.
4. **Entry into Sell.Do CRM:** Automated or manual entry into the CRM ecosystem.
5. **Lead Assignment:** Instant distribution to sales executives for immediate action.
6. **Customer Follow-up:** Systematic calling and automated greeting triggers.
7. **Site Visit Scheduled:** Organizing property walk-throughs and tracking attendance.
8. **Customer Feedback Updated:** Recording post-visit responses and requirements.
9. **Booking / Future Follow-up:** Final closing activities including cost sheet generation and inventory blocking.

Tools Used

- **Primary CRM:** Sell.Do.
- **Data Management:** Microsoft Excel (VLOOKUP, Pivot Tables) and Google Sheets.
- **Collaboration:** Google Workspace and Microsoft Office Suite.
- **Communication:** Gmail, WhatsApp Business, and Integrated Cloud Telephony.

Skills Demonstrated

- **CRM Management:** Advanced use of real estate-specific workflows.
- **Lead Lifecycle Management:** Tracking prospects from capture to closing.
- **Customer Relationship Management:** Building and maintaining strong buyer relationships.
- **Sales Coordination:** Efficiently bridging marketing spend and sales execution.
- **Data Accuracy & Reporting:** Transforming raw data into strategic MIS reports.
- **Professional Communication:** Fluent coordination across cross-functional teams.

Project Impact

Through consistent CRM management and coordination, the following outcomes were achieved:

- **Organized Systems:** Established a centralized, zero-leakage lead repository.
- **Response Efficiency:** Ensured timely follow-ups, reducing lead-to-call latency.
- **Functional Synergy:** Supported smooth collaboration between marketing and sales teams.
- **Operational Excellence:** Assisted in coordinating customer site visits effectively.
- **Data Accuracy:** Contributed to accurate reporting and efficient ROI assessment for management.

Key Learnings

This experience enhanced my professional understanding of:

- **CRM Best Practices:** Maintaining clean and actionable databases for sales teams.
- **Lead Lifecycle Management:** The importance of real-time updates in a fast-paced environment.
- **Customer Relationship Management:** Handling high-value client interactions for luxury projects.
- **Sales Support Operations:** Coordinating logistics and site visit attendance tracking.
- **Cross-Functional Team Coordination:** Collaborating with digital agencies and internal departments.

About Me

I am an MBA graduate specializing in Marketing & Finance with professional experience in CRM, pre-sales operations, customer service, and digital marketing coordination in the real estate industry. I enjoy improving operational workflows, managing customer relationships, and supporting business growth through organized processes and effective communication.

Core Competencies

- CRM Management (Sell.Do)
- Pre-Sales & Lead Operations
- Customer Relationship Management
- Sales & Team Coordination
- Digital Marketing Coordination
- Excel, Google Sheets & Reporting
- Strategic Communication