



FRESHSALES CRM IMPLEMENTATION

Turning Property Enquiries into Qualified Sales Opportunities

Industry focus: Real Estate and Property Sales

BUSINESS OVERVIEW

Real estate teams manage enquiries across property portals, website forms, phone calls, referrals and walk-ins. Buyers may compare locations, budgets, property types, financing readiness and preferred viewing times before making a decision. A structured Freshsales setup can bring buyer and seller records, property preferences, agent ownership, follow-up activities and deal progress into a shared sales process.

Project snapshot

Area	Solution focus
Industry	Residential and commercial property enquiries, viewings and sales
Platform	Freshsales CRM with configured fields, pipelines, workflows and reports; availability depends on subscription and setup
Core challenge	Buyer enquiries and follow-up history spread across portals, spreadsheets, inboxes and individual agents
Primary goal	Standardize qualification, agent assignment, site-visit follow-up and conversion visibility
Delivery approach	Discovery, process design, CRM configuration, data preparation, approved integrations, testing and adoption

Executive summary

In this illustrative scenario, a property business receives enquiries for multiple developments and listings. Each prospect may have a preferred area, budget range, property type, bedroom count, financing status and purchase timeline. Without a shared record, agents can duplicate outreach, miss viewing requests or lose context when a lead is reassigned.

Liyan IT Solution's proposed Freshsales design uses Contacts, Accounts where relevant, Deals, custom fields, tasks and appointments to organize buyer intent and sales activity. Lead assignment rules and workflow automation can support consistent routing and reminders where included in the selected plan. The CRM would track each opportunity from initial enquiry through qualification, site visit, negotiation and closure without treating an enquiry as a confirmed sale.

Intended business outcome

Give agents a reliable view of buyer preferences and next actions, help sales managers identify uncontacted or stalled enquiries, and establish a more consistent basis for reviewing site visits and sales conversion.

SOLUTION PRINCIPLE

Treat every active property enquiry as a relationship with an owner, documented preferences, a clear qualification status and a dated next action.

01 | Business Challenges and Requirements

Property sales combine high enquiry volumes with personal, often time-sensitive conversations. Buyers may enquire about several listings, change budgets or request a viewing outside standard hours. The CRM process must preserve context and ensure fair, visible follow-up without overwhelming agents with unnecessary data entry.

Key challenges in the scenario

- Enquiries arrive through multiple sources, making source attribution and duplicate handling difficult.
- Buyer preferences—budget, locality, property type, bedrooms and purchase timeline—are captured inconsistently.
- Agent assignment may rely on manual forwarding rather than clear territory, listing or workload rules.
- Viewing requests, callbacks and post-visit feedback can remain in personal calendars or messaging threads.
- A prospect may enquire about several properties, while teams lack a consistent way to relate the person to each opportunity.
- Managers have limited visibility into response times, viewing-to-offer progression, stale deals and lost reasons.
- Portal, website, telephony or calendar connections may require separate apps, APIs or custom integration work.

Requirements mapped to Freshsales

Requirement	Proposed approach
Central buyer records	Maintain contact details, consent/source information, preferences and interaction history; define duplicate-review rules before importing records.
Qualification fields	Use agreed custom fields for budget band, preferred location, property type, bedrooms, financing readiness, timeframe and buying/renting intent.
Agent assignment	Define ownership rules by locality, project/listing, enquiry source or team. Auto-assignment capabilities and conditions must be validated for the selected plan.
Sales pipeline	Configure deal stages around qualified interest, viewing, offer, negotiation and outcome; use a separate pipeline only where teams genuinely follow different processes.
Follow-up discipline	Use tasks, appointments, notes and the activity timeline for first contact, viewing confirmation, post-viewing feedback and promised callbacks.
Automation	Evaluate workflows for routing, reminders and selected field updates. Sales sequences and advanced capabilities depend on plan and configuration.
Reporting	Use available standard and custom reports to review lead sources, stage conversion, activity completion, ageing and outcomes.
Integration readiness	Assess portal and website forms, email, calendar, telephony and listing/property systems; connector availability and API work require validation.

Discovery and scope decisions

Liyan IT Solution would confirm the Freshsales edition, user roles, monthly enquiry volume, current source systems, duplicate policy and reporting priorities. Discovery should establish whether one contact can relate to multiple property opportunities, how listing inventory is maintained, what counts as a qualified lead, and who owns enquiries after office hours. Native CRM fields should be distinguished from any custom property inventory module or external listing-system integration.

SUCCESS MEASURES

Agree a baseline for time to first response, percentage of enquiries with an owner, records with a next activity, viewing attendance, viewing-to-offer progression, stage ageing, lead-source conversion and CRM adoption. Treat these as measures to monitor—not promised results.

02 | Proposed Freshsales CRM Solution Design

The proposed configuration makes Freshsales the working record for buyer relationships and sales opportunities. Contact fields capture the person's preferences, deal fields describe the specific property opportunity, and activities record what the agent has promised to do next. Final configuration should be confirmed against the subscribed Freshsales plan.

Core CRM components

Component	Role in the real estate workflow
Contacts and Accounts	Keep buyer, co-buyer, landlord, investor or business-client details together; use Accounts where company or corporate relationships are relevant.
Deals and pipelines	Represent a specific buying or leasing opportunity and move it through the agreed sales stages. Multiple pipelines may be appropriate for distinct teams or transaction types.
Custom fields	Capture locality, property type, budget band, bedroom count, intended move date, financing readiness, listing reference and preferred contact channel.
Tasks and appointments	Schedule first calls, viewing appointments, document follow-ups, offer discussions and post-viewing feedback.
Workflow automation	Where supported, automate routine assignment, notifications, reminders or selected field updates based on defined conditions.
Sales sequences	Potentially coordinate repeatable outreach for eligible prospects. Confirm plan limits, channel support, consent and opt-out handling before use.
Analytics and reports	Use available dashboards and custom reports to review enquiry volume, stage distribution, activity completion, source quality and outcomes.
Integrations and API	Connect approved forms, email/calendar or telephony tools where a supported app or tested API path exists; property portal sync may need separate assessment.

Illustrative property sales pipeline

New enquiry — Record source, contact details, property/listing interest and timestamp.

Contact attempted — Log call/email attempt and set the next contact task if no response.

Qualified buyer — Confirm budget, location, property type, timing and readiness to proceed.

Viewing scheduled — Link the relevant opportunity to a dated appointment and capture attendance status.

Viewing completed — Record feedback, objections, preferred alternatives and agreed next step.

Offer / negotiation — Track offer range, documentation, approvals and decision timing.

Won / lost / nurture — Record the outcome and reason; start the agreed handover or future follow-up.

Integration and data quality

Map form fields to CRM fields before connecting sources. Define the source of truth for listing details, normalize phone numbers and email addresses, check duplicates, preserve consent/source data and document error handling. If property inventory lives in another system, do not assume Freshsales alone will maintain listing availability; validate a supported connector or scope a controlled integration.

ACCESS AND GOVERNANCE

Assign record ownership clearly, restrict sensitive fields where the plan permits, define who can export or reassign records, and document rules for duplicate merges, consent, lost reasons and stage changes.

03 | Activity-Led Workflow and Reporting

Freshsales can support a repeatable enquiry-to-sale process when every stage has a clear exit condition and agents keep activities current. Automation should reduce repetitive administration while leaving buyer qualification, property suitability and commercial decisions with people.

Illustrative lead-to-customer workflow

1. Capture the enquiry

A portal, website form, phone call, referral or walk-in is recorded with source and the property or locality of interest. Form-to-CRM capture must be tested for each source.

2. Assign an owner

Apply the agreed routing rule—such as locality, development or team—and make exceptions visible for manual review.

3. Qualify buyer intent

The agent confirms budget, property type, preferred area, bedrooms, timeframe and financing readiness; incomplete fields remain explicit rather than guessed.

4. Recommend and arrange a viewing

Match the buyer to available listings using the approved inventory source, then create an appointment with location, contact details and preparation notes.

5. Record visit feedback

After the viewing, log attendance, feedback, objections and alternatives. Create a follow-up task with a specific date and owner.

6. Manage offer and negotiation

Track offer status, documents required, approval steps and expected decision date; update the deal only when the agreed stage criteria are met.

7. Close and continue relationship

Record won/lost status and reason. For a win, initiate the agreed transaction handover; for nurture, set a consent-appropriate future contact date.

Automation candidates

- Route new enquiries using agreed criteria, where the chosen Freshsales plan and configuration support the rule.
- Notify the owner or team when an enquiry is unassigned or lacks a first-contact activity.
- Create a reminder for a scheduled viewing and a post-viewing feedback task.
- Flag opportunities with overdue activities or extended time in a stage, using available workflow/reporting capabilities.
- Use sales sequences for suitable, permission-based outreach only after plan, sending limits and opt-out requirements are checked.
- Prompt agents to select a lost reason or next nurture date when closing an opportunity.

Management dashboards

Report	Question it helps answer
Enquiries by source	Which channels generate enquiries that progress beyond initial contact?
First-response and activity status	Are new enquiries assigned and contacted within the agreed service window?
Pipeline by stage and owner	Where are opportunities concentrated, and who needs support?
Viewing and offer progression	How many qualified opportunities reach viewings and offers?
Ageing and overdue activities	Which buyers need an action or a documented reason for delay?
Won/lost reasons	What patterns appear in price, location, availability, timing or buyer fit?

REPORTING DISCIPLINE

Define metric formulas, stage-entry rules and reporting periods before launch. Enquiry counts, pipeline value and forecasts are not equivalent to completed property transactions; validate source data before drawing conclusions.

04 | Implementation Roadmap and Expected Outcomes

A phased delivery gives the property team time to agree its qualification rules, configure Freshsales around real working practices, prepare reliable data and test the full enquiry-to-viewing process before wider rollout.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review enquiry sources, agent roles, listing workflow, buyer fields, data quality and current reports.	Approved requirements and scope
2. Design	Define pipelines, stage criteria, ownership/routing, required fields, consent handling and dashboard metrics.	CRM process and data design
3. Configure	Set up fields, views, pipelines, activities, permissions, available workflows and reports.	Configured test environment
4. Prepare & Connect	Clean and map records; test imports and approved form, email, calendar or portal connections.	Validated records and connections
5. Test & Train	Test routing, duplicate handling, viewing reminders, permissions, reports and representative scenarios.	User acceptance sign-off
6. Launch & Optimize	Go live, support users, review adoption and refine fields, routing and reports from observed use.	Live CRM and improvement backlog

Expected business benefits

- A shared view of buyer preferences, enquiry history and the property opportunity being discussed.
- Clearer responsibility for first response, site visits and post-viewing follow-up.
- More consistent qualification data to support listing recommendations and agent handoffs.
- Earlier visibility into overdue actions, stalled opportunities and recurring loss reasons.
- A more structured basis for comparing lead sources and monitoring stage conversion.
- A scalable foundation for approved form, calendar, communication or listing-system integrations.

How outcomes should be reviewed

30 days: Check data quality, assignment coverage, agent adoption, activity logging and whether key fields are practical. **60 days:** Review response-time baseline, viewing attendance, overdue tasks, stage ageing and source quality. **90 days:** Compare conversion trends and lost reasons with the baseline, validate report reliability and prioritize process changes. Interpret results in context; no improvement is assumed before data is measured.

Why Liyan IT Solution

Liyan IT Solution supports CRM implementation, workflow configuration, data preparation, integration planning and ongoing technical support. The focus is to align the CRM with the property sales process, make ownership and next actions visible, and give management dependable information for coaching and planning.

LET'S DISCUSS YOUR FRESHSALES CRM REQUIREMENTS

Share your enquiry sources, agent assignment rules, property qualification fields, follow-up process and reporting needs. Liyan IT Solution can help define a practical Freshsales configuration around your team's workflow.

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