

Customer Journey in Industrial and Logistics Real Estate



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The Journey

Direction Software LLP began its journey with this leading Real Estate Company in the year 2015 by implementing the MSCRM 2015 On-Premise Module. In the year 2019, the system was migrated to D365 On-Line Version.

CRM Processes for this leading Real Estate Company consist of the following Modules:

- Enquiry
- BD Lead Module
- Deal Management
 - Deal Sheet Management
 - Annexures
- Term Sheet Management
 - Rental Deposit Schedule
 - Security Deposit Schedule
 - Right to First Offer (ROFO)
- Investment Management

Enquiry Management: CRM system is tightly integrated with LinkedIn, Facebook, Twitter, their Website and Call Center. Enquiries from social media and various other sources like Campaigns and Digital Marketing and Cold Calling are also captured in CRM. Lead Scoring mechanism is been defined for the enquiries to qualify them to the next stage.

BD Lead Module: The Enquiries are automatically routed based on the round robin concept defined in the system. Automatic alerts at various stages of the lead are sent. Lead is nurtured and qualified to Deal.

Deal Management: This module caters to the understanding and finalization of the requirements of the customer. Rates are offered and negotiated. Multiple tiers of approvals at various stages of the deal right from proposal till deal is signed. At every stage there are different sub modules and annexures which have to be attached to proceed to the next stage.

Term Sheet Management: This module takes care of the signed agreements, the commercials like the rent deposit, security deposit etc. The duration of the lease is defined. Automatic alerts at a pre-defined interval is triggered intimating the lease is due for expiry.

Investment Management: This module caters right from identification of Land till its Acquisition. Creation of land and then passing through different stages, automatic emails and multi-tier approval mechanism allowing to identify the time taken for the entire life cycle.

Features of Our Solution:

- Seamless integration of Outlook App: Manage all the communication, deal information in one place using the native Outlook App
- Leveraging the Power Apps from the Microsoft Suite and exploring the flexibility of Power Automate for agility
- Configurable business process flow to meet the requirements of various intra departments
- Mobility: Offline and Online functionality to make available data on Go
- Analytics on leveraging power BI for minute slice and dice of data
- Advanced Personalization: Access to Apps based on the department

About Direction

Direction is a leading IT Consulting Company offering E-Business Consulting and other Bespoke Solutions on .Net, Java & Open source platforms. A Microsoft Gold partner practicing Microsoft Dynamics NAV and CRM, Direction offers Business Intelligence and Mobility Solutions.

The company has leveraged its mark as an International mobile solutions provider for the Retail, Logistics, Banking and Payments, Entertainment, Gaming, Public Services sector, Fashion and Apparel, Telecom Research and Development companies.

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