



RevInfotech
revolution redefined



**Case Study
of
AI Features
Integrated with
Real Estate website**

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VERSION:

DATE	AUTHOR	VERSION	CHANGE SUMMARY
March 3 rd 2024	Pratham Jain	1.0	Initial Draft

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AI Implementation Case Study – Revinfotech Pvt. Ltd.

Project Title:

AI-Powered Sales Intelligence & Workflow Automation for a Real Estate Developer (Integrated with Zoho CRM)

Client Overview:

- **Industry:** Residential & Commercial Real Estate
- **Client Name:** Confidential (India-based Tier-1 Real Estate Group)
- **Employees:** 300+
- **Operational Regions:** India – NCR, Mumbai, Pune, Bengaluru
- **Deployment Type:** AI + CRM Extension + Workflow Automation

Executive Summary:

Revinfotech helped a top real estate developer enhance their sales team productivity and operational control using AI-enhanced ZOHO CRM extensions. The solution focused on three areas:

1. **AI Lead Scoring & Routing**
2. **Document Automation (Agreements, NOCs, Booking Forms)**
3. **Sales Task Workflow Orchestration**

With deep integration into **ZOHO CRM**, our system acted as a smart sales assistant—automating repetitive work, flagging risks, and enabling faster decision-making.

Objectives:

- Improve lead conversion and agent efficiency using AI scoring
- Automate generation and validation of property documents
- Integrate ZOHO CRM with AI to manage workflows and pipelines
- Enable centralized reporting and approvals for managers

Delivered Modules

1. AI-Powered Lead Scoring & Routing Engine

Objective: Automatically qualify, score, and assign leads to agents based on likelihood to convert.

Features Delivered:

- Custom-trained **Gradient Boosting Model (XGBoost)** using historical sales and behavioral data
- Input factors: budget match, response time, inquiry source, engagement level
- Scoring returned via **Python Flask API** and embedded into **ZOHO CRM custom fields**
- Routing logic: Assign high-scoring leads to senior agents
- Alert system for stagnant leads or follow-up delay >48h

Technical Stack:

- Zoho CRM Custom Functions + Deluge Script
- Python Flask API + PostgreSQL
- Real-time CRM webhook integration

Benefits Achieved:

- 38% higher lead-to-site visit ratio
- 70% reduction in cold leads assigned to top sales reps
- Improved accountability & pipeline velocity

2. Document Automation Engine

Objective: Auto-generate booking forms, agreement drafts, and NOCs based on Zoho CRM stages.

Features Delivered:

- Pre-approved legal templates connected with CRM record fields
- Dynamic field merge using **Zoho Creator & Zoho Writer APIs**
- OCR validation of scanned KYC documents using **Tesseract + EasyOCR**
- E-signature via **Zoho Sign** triggered post-confirmation stage
- Auto-storage on **Zoho WorkDrive** with audit trail and permission-based access

Integrations:

- Zoho CRM
- Zoho Writer, Zoho Sign, Zoho WorkDrive
- DMS (Document Management System)

Benefits Achieved:

- 90% faster document turnaround time
- Reduced manual errors by 85%
- Full compliance with internal SOPs and RERA documentation

3. Sales Workflow Orchestration Engine

Objective: Streamline internal approvals, follow-ups, and reporting via AI + ZOHO CRM integration.

Features Delivered:

- Custom business logic on stage-based task generation
- Automated task creation in **Zoho Projects + Zoho CRM** (e.g., "Initiate Legal Draft", "Customer Call-back")
- Manager notification triggers for aging deals or deviation from sales path
- GPT-4o powered note summarizer for post-call summaries into CRM
- Automated quote generation + reminder logic

Integrations:

- Zoho Projects, Zoho Mail, Zoho CRM
- OpenAI GPT API for call summary + task instructions
- Slack + SMS gateway integration

Benefits Achieved:

- 60% fewer missed follow-ups
- Manager visibility into pipeline bottlenecks
- Sales cycle shortened by 25%

4. Architecture & Technical Stack

Layer	Technology Stack
CRM & Business Logic	Zoho CRM (Custom Modules, Webhooks, Deluge, Zoho Creator)
AI & Data Science	Python (Scikit-learn, XGBoost, Pandas), GPT-4o, FastAPI
Frontend & UI	Zoho Pages, React (for dashboard widgets), jQuery
Document Engine	Zoho Writer API, Zoho Sign, Zoho WorkDrive, EasyOCR, Tesseract
Hosting & DB	AWS (Lambda, RDS), PostgreSQL, Redis
Security	OAuth 2.0, IP Whitelisting, SSO with Zoho Directory
Monitoring	Zoho Analytics, CloudWatch, Grafana

5. Business Impact Snapshot

Metric	Before Implementation	After AI Integration	Impact
Lead to Site Visit Conversion	~12%	20–22%	↑ +80% increase
Agreement Draft TAT	3–5 days	<6 hours	↓ 90% faster
Missed Follow-ups per Week	~80+	<20	↓ 75% drop
Sales Pipeline Closure Time	~30 days avg.	22–24 days avg.	↓ 20–25% improvement
Sales Agent Workload (Manual Tasks)	High	50% automated	↓ Lower burnout, better focus

Future Scope & Roadmap

- WhatsApp Integration for real-time agent/lead updates
- Predictive Churn Alerts using tenant engagement modeling
- Voice AI to handle post-lead engagement and appointment setup
- Mobile Sales Assistant powered by GPT-4 (for Android/iOS)
- AI-Powered Marketing Campaign Optimizer with Zoho Campaigns

Why Revinfotech?

- **AI-Integrated CRM Expertise:** Certified in Zoho One, GPT, AWS, and Microsoft
- **Global Offices:** USA, India, UAE, UK, Canada, Australia
- **100+ AI & ERP Professionals:** Blending tech, domain, and process expertise
- **20+ Years of Innovation:** 500+ enterprise automation systems delivered
- **Client-Centric Design:** No one-size-fits-all—solutions built for real impact