AI-Powered Calling Agent for Real Estate Teams

smartData™ ENTERPRISES

Overview

smartData was engaged by a mid-sized real estate company based in Australia to address inefficiencies in their lead management and communication process. The client was spending significant time on repetitive phone calls, and missed follow-ups were becoming common. We proposed and developed a custom AI calling solution that acts as a virtual assistant to automate key inbound and outbound tasks. The system connects with the company's CRM and calendar to make sure leads are handled on time and appointments are scheduled accurately.

Problem Statement

The client's sales agents were overwhelmed with day-to-day calls - from following up with prospects to confirming property visits. As call volumes increased, many leads were not receiving timely responses, and call records were scattered across devices. There was no structured way to ensure follow-ups were happening or to track call outcomes. The manual process was limiting the team's ability to scale and resulting in missed business opportunities.

Solution Offered

We built an AI-powered virtual calling assistant that handles both inbound and outbound conversations. The agent is tightly integrated with the company's CRM and appointment system. It can place follow-up calls, respond to customer queries, capture lead information, and automatically log conversations in the system. Agents remain in control while the AI handles routine, repetitive tasks. The assistant understands intent, adjusts its responses, and ensures customers get quick and relevant answers.

Core Features

★ Automated outbound calls for lead follow-ups, appointment reminders, and general enquiries.

★ Inbound support with call transcription and lead qualification.

★ Real-time CRM sync for logging call details, notes, and next steps

★ Calendar integration for booking appointments based on availability

★ Intelligent response system that adjusts based on customer intent

★ Call sentiment tracking and optional call recording

★ Future support for SMS, WhatsApp, and email follow-ups

Technical Challenges & Solutions

The main challenge was integrating the AI agent into the client's existing CRM and workflow without disrupting daily operations. Our team developed custom connectors and ensured all activity syncs in real-time. Another challenge was making the AI sound natural and able to handle common property-related queries. We trained the assistant on sample conversations and fine-tuned it based on live interactions. Agent trust was also a factor – so we gave the human team full control and the ability to intervene when needed.

Conclusion

The AI calling solution helped the client speed up lead handling and reduce manual effort. Agents now focus on closing deals while the assistant takes care of follow-ups, reminders, and routine enquiries. Calls are tracked, appointments are booked on time, and no lead is left behind. This solution has improved customer response time and is already being extended to other business units.