INDUSTRY AGENTS · AGENTFORCE VOICE AGENT

# Real Estate Lead Qualifier & Inspection Booker

## Contacts new property inquiries within minutes, asks a short set of qualifying questions.

A voice and SMS agent that contacts new property inquiries within minutes, asks a short set of qualifying questions, books an inspection in the listing agent's calendar and updates the Lead. It closes the gap between a portal inquiry and the first conversation.



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| SUBAGENTS | ACTIONS | OBJECTS | CHANNELS | TEST CONVERSATIONS |

### WHAT IT DOES

**Initial contact**
Open, confirm consent and disclose recording and AI.

**Qualification**
Capture budget, timeframe, finance status and property to sell.

**Inspection booking**
Offer up to three inspection times and book one.

**Handoff**
Pass offers and negotiation to the listing agent.

### THE RULES IT FOLLOWS

- Call only between 09:00 and 20:00 in the inquirer's local time; otherwise send an SMS offering a callback time.
- At the start of the call, say it may be recorded and that the caller is speaking with an AI assistant.
- Give no price guidance beyond the listed price and no legal, finance or valuation advice.
- Hand offers, negotiation and contract questions to the listing agent.

### NOT INCLUDED

- Offer management, contracts and negotiation.
- Valuations and appraisals.
- Listing syndication.

**WORKS WITH**
Talks to customers

**WHERE IT WORKS**
SMS, Phone

**RUNS ON**
Sales Cloud, Agentforce, Agentforce Voice with a telephony provider, SMS

**BEST FOR**
Property inquirers, listing agents, buyer agents, sales assistants and brokerage managers

**INDUSTRIES**
Residential brokerages · Commercial brokerages · Property developers · New home sales · Rental agencies · Luxury real estate · Real estate teams · Auction houses

### WHAT YOU NEED

- ✓ Agentforce Voice enabled and a telephony provider connected.
- ✓ Listings, agent calendars, calling hours and recording disclosure wording; local automated calling rules reviewed by you.

Coming soon. Designed in full and built to the same standard as the live agents.

**Free scoping: a 60-minute review with an architect.**
We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER