

Perfect Your Estate Agent Pitch

Create a flowchart that shows your communication process



1

When a customer calls, identify who they are using CRM software that integrates with BT.



2

Find the customer's history, access your engineer's diary, and book a job.



4

When the engineer is heading to the job, send a link that allows the customer to track the engineer's route and see the engineer's ID, photo, bio, etc.



3

Send a job confirmation to the customer and the estate agent, and schedule an automated reminder for the night before the appointment.



5

Order parts online and ask the estate agent for approval in real-time, which will automatically raise a purchase order.



6

Notify the customer and estate agent when parts become available, and schedule a new appointment.



Need to automate your workflow?



7

Send a digital certificate and invoice to your customer and the estate agent.

Watch the demo here >>

