

Course : AI-Enhanced Real Estate Lead Generation and Customer Relations

Generate leads, personalize your customer relationships, and optimize your sales performance

Practical course - 2d - 14h00 - Ref. AYM

Price : 1680 CHF E.T.

NEW

Artificial intelligence is transforming lead generation and customer relationship management practices in the real estate industry. It enables companies to produce sales content more quickly, qualify leads, personalize communications, and automate certain low-value-added follow-ups. By the end of the training, participants will be able to improve their sales effectiveness while strengthening the quality of their customer relationships.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Identify opportunities to automate lead generation and customer relationship management
- ✓ Creating Effective Marketing Content with Generative AI
- ✓ Design an AI-powered process for qualifying and tracking leads
- ✓ Tailor sales interactions based on the customer's or decision-maker's profile
- ✓ Developing an Action Plan to Integrate AI into Your Business Operations

Intended audience

Real estate agents, brokers, representatives, branch managers, sales managers, business development managers, business center managers, and anyone involved in real estate business development.

Prerequisites

No specific knowledge required.

PARTICIPANTS

Real estate agents, brokers, representatives, branch managers, sales managers, business development managers, business center managers, and anyone involved in real estate business development.

PREREQUISITES

No specific knowledge required.

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

Practical details

A mix of methodological instruction, demonstrations, and hands-on exercises. Case studies based on real-world scenarios in the real estate industry. The training program is based on a core set of skills common to all real estate professions, enriched by case studies and exercises tailored to the specific characteristics of residential or commercial real estate, depending on the participants' profiles.

Course schedule

1 Understanding the Benefits of AI in the Real Estate Sales Cycle

- Identify the concepts of AI, generative AI, and automation
- Analyze the stages of the prospect and customer journey that can be optimized
- Identify time-consuming tasks with low value-added
- Assessing the Benefits, Limitations, and Risks of Business Automation
- Implementing Best Practices for Data Protection

Hands-on work

Red Thread Case Study: Mapping the Sales Journey. Residential: The seller's journey, from the request for an estimate to the listing agreement / Commercial: The B2B decision-maker's journey, from identifying the need to the real estate proposal.

2 Creating Effective Lead Generation Content with Generative AI

- Writing Effective Prompts to Achieve a Business Goal
- Generate multichannel prospecting messages
- Create scripts for making calls and scheduling appointments
- Tailor messages to prospect profiles
- Promote a property listing, an asset, a service, or a real estate opportunity

Hands-on work

Case Study: Creating a Comprehensive Prospecting Sequence. Residential: Message to a homeowner selling their property / Commercial: Message to an executive, real estate manager, HR director, CFO, or office manager.

3 Generate, qualify, and track leads using AI

- Structuring a Process for Collecting and Qualifying Leads
- Leveraging AI to Analyze Incoming Requests and Prioritize Contacts
- Design qualification processes based on chatbots and existing forms
- Design AI-powered follow-up and reminder workflows
- Identify tasks that can be delegated to an AI agent and illustrate scenarios using Power Automate

Hands-on work

Red Thread Case Study: Designing an AI-Assisted Prospect Journey. Residential: Qualifying a seller, following up after an appraisal, and prioritizing listings / Commercial: Assessing a location need, evaluating project maturity, prioritizing accounts, and following up with decision-makers.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

4 Prepare for appointments and personalize customer relationships with

AI

- Analyze customers' needs and intentions
- Preparing for a Sales Meeting with AI Assistance
- Anticipating Objections
- Generate personalized recommendations
- Prepare reports and follow-ups on discussions

Hands-on work

Red Thread Scenario: Role-playing. Residential: Sales meeting aimed at securing a listing/Commercial: Meeting with a corporate decision-maker to assess real estate needs and address objections.

5 Building an AI-Enhanced Sales Strategy

- Identify priority use cases based on business objectives
- Choose the right tools for your business
- Define Sales Performance Metrics
- Develop a plan for the phased adoption of AI
- Develop an operational roadmap

Hands-on work

Final presentation of the “fil rouge” case: prospecting strategy, lead qualification, follow-up script, priority AI applications, and roadmap.
Residential: development of the portfolio of listings / Commercial: development of the B2B opportunity pipeline.

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Dates and locations

REMOTE CLASS

2026 : 3 Dec.

2027 : 22 Mar., 21 June, 13 Sep., 6 Dec.