From On-Site Voice Notes to Client Emails:

Accelerating Real Estate Operations with Mobile Generative AI



ABSYZ
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1 Key Project Highlights

On-the-Go Mobile Voice Capture:

Integrated a custom Lightning Web Component (LWC) into the Salesforce Mobile App to capture real-time audio from field agents.

LLM Audio Refinement:

Utilized the Salesforce Connect API to transmit transcripts to an LLM, cleaning up spoken pauses, filler words, and regional slang.

Contextual Email Drafting:

Cross-referenced historical email activity and lead records in Salesforce to draft highly personalized, context-aware follow-up emails.

One-Tap Agent Approval:

Allowed agents to review, edit, and send polished emails directly from their mobile devices seconds after leaving a property site.

2 Quick Glimpse

A leading real estate firm eliminated administrative follow-up delays for agents working in the field by deploying a Voice-to-Email Mobile Generative AI Agent.



By recording quick spoken audio notes after property showings, agents automatically transform raw voice input into contextually aware, professional email drafts grounded in past lead interactions—reducing follow-up times from hours to seconds.

3 Business Impact

90%

90% Faster Follow-Up:

Cut lead response times from hours down to under 60 seconds post-showing.

70%

70% Reduction in manual mobile typing and administrative data entry for field agents.



Higher Conversion Rates:

Increased lead engagement by delivering rapid, highly context-aware responses.

100%

100% Mobile Adoption:

Enabled 100% field usability via the native Salesforce Mobile App.

Industry

Real Estate / Property Management

Technology Stack

- Salesforce Mobile App
- Custom LWC
- Salesforce Connect API
- LLM Framework
- Sales Cloud

Client

A premier commercial and residential real estate organization whose agents spend the majority of their workdays on-site at properties, away from desktop computers.

4 The Challenge

Real estate agents earn business through responsiveness and personal relationships. However, capturing notes and sending thoughtful follow-ups while traveling between property showings presented major operational bottlenecks:

Delayed Lead Follow-Ups:

Agents often waited until the end of the day to sit at a laptop and draft emails, by which time prospective buyers lost momentum.

Fragmented Context:

Key property preferences and verbal agreements mentioned during site visits were frequently forgotten or misrecorded by evening.

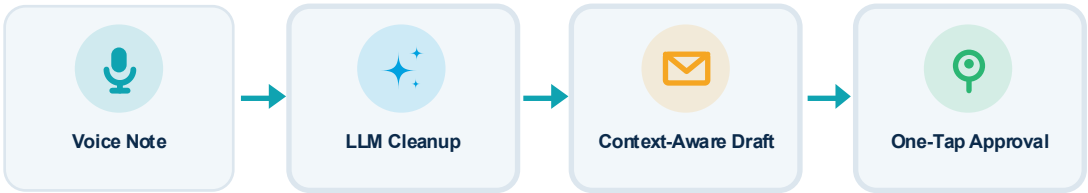
Mobile Friction:

Typing long, professional emails on smartphone keypads between appointments led to brief, impersonal messages or delayed communication.

Loss of Interaction History:

Past email context was rarely referenced when sending quick mobile texts or brief emails on the road.

5 How We Helped



1

1. Custom Mobile Voice Capture LWC

We engineered a custom, lightweight Lightning Web Component embedded directly within the Salesforce Mobile App. Agents simply tap record after leaving a property and speak naturally about the interaction.

2

2. LLM Cleanup via Connect API

The audio transcript is processed using an LLM via the Salesforce Connect API. The AI strips out filler words, corrects property terminology, and organizes raw spoken thoughts into structured, professional text.

3

3. Context-Aware Draft Generation

Before generating the final email, the system retrieves the prospect's historical email interactions and preferences stored in Salesforce. The LLM combines the newly spoken notes with previous interaction history to compose an email that feels personal, professional, and relevant.

6 The Outcome

Real estate agents shifted from manual desktop reporting to instant, voice-driven mobile execution.



Immediate Client Engagement:

Prospects receive personalized follow-up emails detailing agreed-upon next steps within 2 minutes of completing a walkthrough.

Zero Mobile Typing Burden:

Agents dictate notes hands-free while walking to their cars, eliminating tedious mobile typing.

Complete Interaction Records:

Every voice note and generated email is automatically logged on the Lead and Opportunity record for complete pipeline visibility.