ARGOLOGIC.

Tech Solutions for Real Estate Agents

WHO IS ARGO LOGIC?

Argo Logic helps real estate firms modernize their client engagement, streamline operations, and improve data management through Salesforce and integrated cloud solutions. Whether you're a residential agency managing open homes and contracts, or a commercial firm tracking investor leads and tenancies—we bring deep process automation and CRM expertise to help you scale smarter.

WHAT WE DO BEST

- **CRM Customisation for Real Estate -** Configure Salesforce to manage buyers, sellers, tenants, landlords, and projects in a single source of truth with real-time insights and lead tracking.
- **Lead Management & Automation -** Capture leads from REA, Domain, social media, your website, or walk-ins—and automatically assign them to agents with follow-up workflows and tagging.
- **Social Media Lead Capture & Engagement -** Integrate Salesforce with Instagram, Facebook, or Whatsapp and DMs to capture interest from potential sellers and buyers. Auto-tag leads, trigger nurture emails or SMS replies, and assign agents based on location or listing type.
- **AML/KYC Readiness -** Prepare for upcoming AML/CTF compliance changes. Argo Logic can help configure ID verification workflows, secure client document upload portals (for 100-point checks, TFNs, passports), and audit trails—ensuring you're ready when new regulations come into effect.
- **Inspection, Offer & Contract Workflows-** Manage property inspections, offers, applications, and contract milestones in Salesforce—with SMS/email updates and auto-reminders.
- **Investor & Project Marketing -** Track investor interest, distribute IMs and project updates, and run campaigns via Salesforce Account Engagement or integrated marketing tools.
- **Commission & Referral Tracking -** Automatically track sales commissions, property referrals, and agent performance—linked directly to listings and sales data.

TECHNOLOGIES WE HELP WITH

We work with the leading ecosystem of tools used by real estate firms, including:

- **CRM & Automation:** Salesforce Sales Cloud, Financial Services Cloud, Account Engagement, HubSpot (migrations)
- **Social & Lead Capture:** Meta Lead Forms, Instagram DM automation, TikTok lead flows, Zapier, Typeform, Gravity Forms
- **AML/KYC Tools:** GreenID, FrankieOne, SwiftCheck, DocuSign ID Verification, secure upload portals
- **Marketing & Communications:** Campaignmonitor, ActivePipe, Mailchimp, Aircall, SMS integrations, Salesforce Marketing Cloud, and others.
- **Document Management:** DocuSign, Conga, Formstack, Google Workspace, Microsoft 365
- **Back Office Tools:** Xero, MYOB, Employment Hero
- **Integration Tools:** MuleSoft, Jitterbit, Zapier, Custom APIs

COMMON PROBLEMS WE SOLVE

- **Disparate Systems & Manual Spreadsheets** - Replace disconnected tools (e.g. Excel, inboxes, paper files) with one platform to manage listings, contacts, deals, and follow-ups.
- **Missed Leads & Poor Social Follow-Up** - Ensure every lead from social media is captured, qualified, and followed up—automatically—with alerts, assignments, and CRM tracking.
- **Lack of Visibility Across the Team** - Enable principals and sales managers to view pipelines, team activity, commissions, and lead status—all in one dashboard.
- **Compliance & Document Management** - Manage contracts, ID verification, and property disclosures via encrypted, secure upload tools—no more risky email attachments.
- **Preparing for AML/KYC Requirement**s - With AML/CTF obligations set to include real estate professionals, we help you get ahead by designing compliant onboarding workflows and secure document trails.

CASE STUDY: BOSTON MARKETING
Read the full case study here

CALL ARGO TODAY!