

● [01 / OPERATING MAP]

SHOEB LODHI - GROWTH SYSTEMS ARCHITECT

UAE Real Estate Automation Playbook

Connect property inquiries, bilingual follow-up and viewings in one CRM.

v1.0 - October 2026 / shoeblodhi.com

I build the workflow around the inquiry, the property and the assigned agent. A buyer asking about three listings should not receive three competing introductions.

Sources → One inquiry record → Language + intent → Agent assignment → Viewing → Outcome + nurture

What this playbook covers

- Capture from property portals, Meta and Google ads, WhatsApp and walk-ins.
- A permission-aware first response with a human escalation path.
- Separate off-plan and secondary-market conversations.
- Arabic and English templates, agent routing and confirmed viewings.
- A small reporting loop that reveals leaks without inventing attribution.

Set the operating boundaries

Brokerage / team / operations owner

CRM / property inventory source

Coverage: areas / projects / property types

Languages / staffed hours / backup agent

Reporting timezone, for example Asia/Dubai

First pilot source and property segment

Operating rule: use verified listing facts and current availability. The assistant can qualify interest and arrange the next step. A human agent verifies commercial details and handles advice, offers and exceptions.

Minimum inquiry record

Contact ID, inquiry ID, source and source event ID, received time, listing or project reference, buy/rent/sell intent, language, stated budget and currency, timing, allowed channels, assigned agent and next action.

All timings and cadences in this guide are example operating defaults to adapt. This document states no market statistics or specific UAE regulations. Have the relevant reviewer approve contact, data and platform practices.

● [02 / CAPTURE & ASSIGN]

Reach the right agent quickly.

Speed-to-lead starts with reliable capture. Measure when an inquiry arrives, when a response is attempted and when a person actually engages.

Source	Capture and preserve	First action
Property portals	Portal inquiry ID, listing reference, original message and permitted contact details.	Reconcile against the portal inbox; verify the listing before making claims.
Meta / Google ads	Form or landing-page event ID, campaign, ad and stated service interest.	Match the inquiry to the offer. Keep permission wording and source time.
WhatsApp	Conversation reference, language, request and contact preference.	Respond in context and attach to the existing inquiry where appropriate.
Walk-ins / calls	Staff-created inquiry with source and permission recorded.	Read back the contact details and assign the next action before the person leaves.

Example speed-to-lead workflow

1. **On receipt:** stamp the event, check duplicates and suppression, then assign a queue. Do not overwrite an existing active agent without review.
2. **Example target: within 1 minute:** send a relevant acknowledgement on a permitted channel. Name the AI assistant if automation is conversing.
3. **Example target: within 5 staffed minutes:** an agent accepts a high-intent inquiry or the AI asks the approved basic questions.
4. **If acceptance is overdue:** notify the backup agent, then the duty manager. Keep an audit trail of reassignment.

Assignment and round-robin

Filter the eligible pool by area or project, language, shift, capacity and service type. Preserve the active relationship owner where appropriate. Round-robin only among eligible agents, advancing the pointer after a successful assignment.

Use one assignment operation per inquiry so two events cannot choose different agents. Require acknowledgement. If nobody qualifies, route to a staffed fallback queue and record a callback window. A manager handles ownership disputes.

- ☐ Source retries do not reset assignment or send another introduction.
- ☐ Unavailable agents leave the pool; capacity limits are visible.
- ☐ A new property inquiry is attached to the contact with its own context.

Acceptance target / backup route / manager escalation

● [03 / BILINGUAL MESSAGING]

Keep the same promise in both languages.

Ask for a language preference and preserve it across handoffs. Have a fluent reviewer approve Arabic wording and property terminology before launch.

First reply: English

"Hello [name], I'm the AI assistant for [brokerage]. We received your inquiry about [verified listing or area]. Would you prefer to continue in English or Arabic?"

First reply: Arabic

مرحباً [الاسم]، أنا مساعد يعمل بالذكاء الاصطناعي لدى [الشركة]. وصلنا استفسارك عن [العقار أو المنطقة]. هل تفضل المتابعة بالعربية أم بالإنجليزية؟

Qualification: English

"Are you looking for a home or an investment? Which areas, property type and budget range in [currency] would you like us to work with? You can skip any detail you prefer not to share."

Qualification: Arabic

هل تبحث عن منزل للسكن أم عن استثمار؟ ما المناطق ونوع العقار ونطاق الميزانية بالعملة التي تحددها؟ يمكنك تجاوز أي معلومة لا ترغب في مشاركتها.

Viewing request: English

"I can check a viewing for [verified property]. Would [option with date, time and timezone] suit you? This is a request until the agent and access are confirmed."

Viewing request: Arabic

يمكنني التحقق من إمكانية معاينة [العقار]. هل يناسبك [التاريخ والوقت والمنطقة الزمنية]؟ يبقى الموعد طلباً إلى أن يؤكد الوكيل وتؤكد إمكانية الدخول إلى العقار.

Stop and preference handling

English: "Understood. We will stop this follow-up. Thank you for letting us know."

مفهوم. سنوقف هذه المتابعة. شكراً لإبلاغنا.

Recognize natural-language stop requests in either language. Update the shared suppression state before ending the workflow. If the meaning is unclear, pause outreach for human review.

Arabic reviewer / approval date

Language fallback / interpreter route

● [04 / NURTURE TRACKS]

Separate the buying conversations.

Off-plan and secondary inquiries need different information. Ask which path the buyer wants before adding a sequence.

Off-plan track

- Record project, unit preference, purpose, stated budget and desired decision date.
- Share only approved, dated project information.
- Route payment-plan, completion-date and contract questions to the agent.
- Recheck availability before quoting a unit or inviting a reservation discussion.

Secondary track

- Record location, property type, move timing and viewing preference.
- Verify asking price, availability and relevant property details.
- Coordinate viewing access with the authorized person.
- Route offer terms, finance and transaction questions to the responsible agent.

Decision point	Off-plan action	Secondary action
Needs information	Send one approved project overview relevant to the stated need.	Send a verified listing summary and ask which detail matters.
Wants to compare	Ask the agent for a dated comparison with limitations made clear.	Ask the agent for a current shortlist matched to the stated criteria.
Ready to meet	Book a project discussion or appropriate visit with the correct specialist.	Request viewing access, host and a verified time.
Not ready yet	Record a future review date and relevant project-interest reason.	Record search timing and ask permission for a later check-in.
Listing unavailable	Explain the verified status and offer an agent-led alternative.	Stop property-specific prompts and ask about suitable alternatives.

Claims and escalation

The AI assistant does not promise returns, appreciation, availability, financing approval, completion dates or residency outcomes. It may relay approved factual material with its date and source; unresolved questions go to the appropriate person.

Switch tracks when the buyer changes intent. Cancel the old queued messages, preserve the history and give the agent the reason for the change. Stop sales nurture when a live negotiation or complaint is underway.

Off-plan content owner / review date

Secondary inventory owner / refresh process

Track change trigger and the person who approves exceptions

● [05 / VIEWING OPERATIONS]

A viewing needs access and an owner.

A calendar slot alone cannot confirm access to a property. Keep requested, pending and confirmed viewing states distinct.

1. **Check the property:** use the current listing reference, status and approved details. If unavailable, ask whether alternatives would help.
2. **Confirm the visitor's needs:** property, date options, language, number of attendees if needed and any access needs they choose to share.
3. **Assign the host:** check area or project capability, availability and capacity. Keep an existing relationship owner informed.
4. **Verify access:** the agent confirms the authorized access arrangement and meeting point. Keep private access codes out of general messages.
5. **Reserve and confirm:** create one appointment, store its ID and repeat the date, time, timezone, host and approved meeting location.
6. **Remind and manage changes:** use a permitted channel. Update the existing appointment on reschedule and cancel stale reminders.
7. **Close the loop:** the host records held, cancelled or no-show, feedback, next action and a due date.

Confirmation template

“Your viewing for [property reference] is confirmed for [day, date, time and timezone]. Your host is [agent] at [approved meeting point]. To change the appointment, reply here or contact [business number].”

Pending access template

“We have requested [date and time]. Your agent is checking access. This viewing is not confirmed yet. We will update you by [realistic staffed deadline].”

Exception	Required action
Agent does not accept	Reassign through the eligible pool or manager. Notify the buyer if timing changes.
Access falls through	Stop confirmations, explain the issue and offer verified alternatives.
Buyer cancels	Release the slot, update the host and ask whether a new time is wanted.
No-show	Ask the host to verify, then use one approved recovery action. Do not mark held.
Access verifier / backup host	Pending-viewing deadline / reminder policy

● [06 / FOLLOW-UP & WHATSAPP]

One conversation, one active owner.

Use WhatsApp as part of the operating system, with shared context and a clear human owner.

WhatsApp Business considerations

- Review the current account, provider, template and messaging policies before launch. Have the responsible reviewer approve the intended use.
- Record why the business may contact this person on this channel. A portal phone number alone is not your internal approval record.
- Keep business identity, permissions, approved templates and human escalation visible to operators.
- Check replies, delivery failures and opt-outs before every queued send. Pause automation while a person is handling the conversation.
- Use an approved team inbox and restricted CRM access. Move identity documents and private transaction material to the secure process.

Example follow-up cadence after an inquiry, subject to permission and contact hours. A reply changes the next action immediately.

When	Useful touch	Owner / stop condition
On receipt	Acknowledge the specific inquiry and ask language preference.	AI or lead desk; stop if invalid or suppressed.
Same staffed period	Confirm intent and offer a verified next step.	Assigned agent; pause for active human conversation.
Example: day 1	Ask which unresolved detail would help the decision.	Agent-approved workflow; skip if answered or booked.
Example: day 3	Share one relevant project update or verified listing option.	Agent; no unverified price or inventory claim.
Example: day 7	Ask whether to close the loop or agree a later check-in.	Agent; no reply ends this active cadence.
Agreed future date	Follow up for the recorded reason and preference.	Owner checks relevance and permission again.

Global stop conditions

Stop or pause when the lead replies, books, declines, opts out, raises a complaint, enters negotiation or changes owner. Do not stack calls, WhatsApp and email on the same day simply because each tool has its own sequence.

Permitted channels / daily contact limit

Reply owner / stop-sync owner

Approved template references / review date

● [07 / REPORT & RELEASE]

Review leaks by source and agent.

Use inquiry cohorts and separate automated acknowledgement from meaningful contact. Keep source quality, agent capacity and inventory issues visible.

Measure	Definition	Review action
Capture coverage	Unique CRM inquiries / valid source inquiries received.	Reconcile portal and ad inboxes.
First-response time	Received-to-first-attempt; also report received-to-two-way-contact.	Inspect median, slowest cases and unanswered leads.
Assignment acceptance	Accepted assignments / assignments made, with queue age.	Check shift, language and capacity filters.
Viewing booking rate	Inquiries with a confirmed viewing / qualified inquiries.	Review availability and booking friction.
Viewing show rate	Held viewings / viewings due, with cancellation treatment stated.	Review access failures and reminders.
Outcomes	Offers, won and lost inquiries with reasons and verified evidence.	Separate commercial issues from follow-up failures.
Conversation health	Opt-outs, delivery failures, unowned replies and oldest next action.	Fix the workflow before adding volume.

Record the reporting timezone, source attribution rule and period. Count reschedules once. A contact may have multiple property inquiries; avoid counting each message as a new lead.

Weekly review and pilot checklist

- ☐ Reconcile one inquiry from each source to its next action.
- ☐ Inspect Arabic and English conversations, including unresolved and declined inquiries.
- ☐ Test owner absence, duplicate events, unavailable inventory and access failure.
- ☐ Test opt-out, booking, cancellation and human takeover across all active sequences.
- ☐ Agree one improvement, a responsible owner and a review date.

Pilot source / segment / launch owner

Dashboard owner / weekly review time

Largest leak / planned fix

Pause switch / backup operator

Want help implementing this?

Bring a portal inquiry, an unowned WhatsApp conversation and your viewing process. We can map the first connected workflow.

shoebloodhi.com/contact