WWW.IJRPR.COM

International Journal of Research Publication and Reviews

Journal homepage: www.ijrpr.com ISSN 2582-7421

Lead Quality, Follow-Up Persistence and Site-Visit Generation in Real Estate Pre-Sales: A Single-Case Study of Database Telecalling in a Pune Mandate Firm

Siddhi Vishal Chandak

MBA (Marketing), School of Business
Indira University, Pune, India

ABSTRACT—

Real estate pre-sales teams in India depend on outbound telecalling to turn large contact databases into physical site visits, yet little documented evidence explains why so few calls end in bookings. This paper presents a practitioner-based single-case study drawn from an approximately two-month pre-sales assignment at a Pune-based real estate mandate firm. The author placed about 150 outbound calls per day across six categories of lead data: fresh raw data, area-specific data, other-project data, previously non-connected data, fresh CRM leads and "Visited, Did Not Book" (VDNB) data. From recorded counts and recalled daily averages, the study reconstructs an estimated weekly funnel in which roughly 13–20% of dialled calls were answered, three to four site visits were scheduled per week, ten site visits were recorded across residential and commercial projects, and one booking was recorded, from a VDNB lead. The central finding is that poor lead quality, not selling effort, was the main cause of low yield. Six recurring quality problems are identified: unreachable numbers, outdated data, geographically unsuitable prospects (including contacts outside the state), expired purchase intent (already purchased, plan dropped, search abandoned long ago), mismatch between price and location, and declined site visits. The paper proposes a lead-quality funnel framework, five testable propositions, a screening and data-hygiene checklist and a measurement template. The analysis is descriptive and interpretive; no inferential statistics are reported because the data do not support them.

***Index Terms*—real estate pre-sales, lead quality, telecalling, lead qualification, site-visit conversion, customer relationship management, India.**

I. INTRODUCTION

Residential and commercial property is a high-involvement, high-value purchase in which buyers typically take considerable time to decide and compare several projects before committing. For developers and the mandate firms that market on their behalf, the commercial challenge is therefore not only to attract enquiries but to move a sufficient number of genuinely interested prospects to the project site, where the product can be physically evaluated. The pre-sales function sits at this transition: it contacts prospects, establishes interest and requirements, and works towards a site visit that the sales team can then convert.

In Indian city markets such as Pune, pre-sales work is frequently organised around large purchased or inherited contact databases and CRM-generated enquiries. Executives place high daily call volumes, and most calls do not reach a willing buyer. Managers often respond to weak results by asking for more calls or better scripts. Practitioner experience suggests, however, that the quality of the database may matter more than the volume of calling or the polish of the pitch: numbers that do not answer, contacts who live outside the state, people who have already bought elsewhere, and prospects whose plans lapsed years ago cannot be converted by any script.

Although this model is widespread, academic documentation of it is sparse. Customer relationship management (CRM) and customer-journey research largely address other industries or treat pre-sales as an undifferentiated step [1], [2]. This paper contributes a transparent account of one pre-sales assignment and uses it to derive a structured interpretation of why yields are low, a lead-quality framework, propositions for future testing, and practical recommendations.

The study makes four contributions. First, it reconstructs the volume economics of database telecalling from recorded and recalled figures. Second, it distinguishes six lead-data categories and discusses why they differ in readiness. Third, it classifies the recurring causes of non-conversion into six lead-quality dimensions. Fourth, it highlights re-engagement of VDNB prospects as an under-examined segment, linking it to the win-back and relationship-revival literature [3], [4].

II. LITERATURE REVIEW

A. CRM and the Customer Journey

Payne and Frow [1] argue that CRM is best understood not as a software purchase but as a cross-functional, process-based strategy built on strategy development, value creation, multichannel integration, information management and performance assessment. For pre-sales, the information-management process is directly relevant: a call database or CRM is useful only if contact details are current and contact outcomes, follow-up dates and lead status are recorded consistently. A database that is outdated at the point of purchase cannot support any later process, however well designed.

Lemon and Verhoef [2] frame the customer journey as a sequence of touch points across channels and note that improving performance at individual touch points can raise conversion. A telephone call, a reminder message and a site visit are such touch points, and the pre-sales executive manages the

early ones. The journey view also implies that a prospect's position in the journey at the time of contact matters: a person who has already purchased, or who stopped searching long ago, is outside the journey that the call assumes.

B. Lead Qualification and Prioritisation

Research on lead handling emphasises that not all leads deserve equal effort. Jolson [6] distinguishes tight and loose approaches to qualifying sales leads, a trade-off between screening early to save effort and screening loosely to avoid discarding future buyers. Monat [5] shows, in an industrial setting, that managers often assess lead quality by judgement and that errors in doing so distort forecasts and resource allocation; he proposes scoring leads on observable characteristics. Järvinen and Taiminen [7] discuss marketing automation in business-to-business settings, and later literature citing their work notes that lead selection is often intuition-driven.

These studies concern business-to-business or industrial contexts. Residential real estate involves consumer buyers, a long and emotionally loaded decision, strong dependence on location and price, and databases whose contacts may have bought, relocated or abandoned their plans. Whether industrial scoring ideas transfer to such data is largely unexamined.

C. Relationship Building, Trust and Re-Engagement

Morgan and Hunt [8] identify commitment and trust as key mediating variables in successful relationship marketing, which is consistent with the practitioner view that property sales depend on credibility built across several interactions. In the win-back literature, Thomas, Blattberg and Fox [3] treat the reinitiation of relationships with lapsed customers as a distinct strategic task, and Homburg, Hoyer and Stock [4] study antecedents of relationship revival. These works concern customers who previously transacted; VDNB prospects have visited but not bought. The parallel is therefore analogical and is used here only as a conceptual lens.

D. Regulatory Context

The Real Estate (Regulation and Development) Act, 2016 [9] established state-level regulatory authorities, requires registration of qualifying projects and of real estate agents, and aims to increase transparency and protect buyers. For pre-sales communication, this raises the importance of accurate project information given on calls.

III. RESEARCH GAP, PROBLEM AND OBJECTIVES

A. Research Gap

The searches conducted for this study did not identify peer-reviewed work that addresses the following four gaps, which this paper takes up descriptively without claiming that the literature search was exhaustive.

- **Empirical gap:** the volume, connect rate and visit yield of database telecalling in Indian residential pre-sales are not documented.
- **Data-quality gap:** lead-qualification research focuses on scoring leads that are assumed to be reachable and current [5], [6]; the effect of stale, mis-located or already-converted contacts on yield is not examined.
- **Contextual gap:** studies of lead handling are concentrated in industrial or business-to-business settings, while consumer real estate, with price-location sensitivity and long decision cycles, is under-studied.
- **Re-engagement gap:** win-back research addresses lapsed customers [3], [4]; treatment of prospects who visited a project and did not book is not examined.

B. Problem

Pre-sales teams invest substantial daily effort in outbound calling, but the share of effort that yields conversations, qualified interest and visits, and the reasons for the shortfall, are rarely documented. This limits evidence-based decisions on data purchase, cleaning, segmentation, scripts and call allocation.

C. Objectives

(1) To estimate the call-to-visit funnel for database telecalling in a real estate pre-sales assignment. (2) To describe the lead-data categories handled and their apparent readiness. (3) To identify and classify the recurring causes of non-conversion. (4) To interpret the roles of follow-up and CRM tracking. (5) To examine the VDNB booking as an illustrative case of re-engagement.

D. Research Questions

RQ1: What proportion of daily outbound calls reach a prospect, and how many site visits result? RQ2: How do lead-data categories differ in apparent readiness? RQ3: What recurring lead-quality problems explain the low number of bookings? RQ4: What does the VDNB booking suggest about treatment of previously visited prospects?

IV. CONCEPTUAL FRAMEWORK AND PROPOSITIONS

The study adopts a lead-quality funnel (Fig. 2). Leads from six data categories enter outbound calling; a lead can fail at any stage, and each failure can be traced to a quality dimension: reachability, currency, geographic fit, intent status, value fit and visit feasibility. Selling skill is assumed to operate mainly after a qualified prospect is reached. The framework yields five propositions, which the case illustrates but does not test.

- **P1:** Connect rate depends mainly on database reachability and currency, not on script quality.
- **P2:** The share of answered calls that are genuinely qualified falls when intent is stale, location is unsuitable or price-location fit is poor.
- **P3:** Lead categories differ in readiness; one script and schedule for all is inefficient.
- **P4:** Structured follow-up of VDNB prospects can recover some prospects that would otherwise be treated as lost.
- **P5:** Scheduled visits are not completed visits; unconfirmed scheduling overstates pipeline.

V. RESEARCH METHODOLOGY

A. Design

The study is a qualitative-descriptive, single-case design based on participant observation. The author worked as a pre-sales and business-development intern for approximately two months in 2026 at a Pune-based real estate mandate firm and recorded activities, outcomes and observations in an internship report.

B. Data and Their Status

Three types of information are used and are kept distinct throughout. **Recorded** data are figures stated in the internship report's project tables (ten site

visits, six residential and four commercial; one booking). **Recalled estimates** are daily and weekly averages supplied by the author from memory: about 150 calls per day; 20–30 answered per day; three to four site visits scheduled per week; site visits arising from all data categories, roughly one to two each. **Interpretive observations** are the author's qualitative judgements, including the causes of non-conversion in Section VII-D. No survey, questionnaire, interview or system export was used, and no sample in the statistical sense exists.

C. Analysis

Estimates were converted into ratios by simple arithmetic. Weekly figures assume a five-day calling week, an assumption stated explicitly because working days were not logged. Ranges rather than point values are reported. Recurring customer responses were grouped by content into lead-quality dimensions. Because no counts per cause were recorded, causes are presented as a qualitative taxonomy without frequencies. No significance tests, confidence intervals or regression are used, since a single-case, recalled dataset cannot support them.

D. Ethics and Confidentiality

No customer-identifying information is reported. The organisation, its projects and commercial values are anonymised or omitted.

VI. INDUSTRY AND ORGANISATIONAL CONTEXT

The organisation is a private real estate sales-and-marketing mandate firm operating in Pune. It markets residential and commercial projects on behalf of developers and provides lead generation, telecalling, customer engagement, follow-up and site-visit generation. Pune's residential growth corridors and its competitive field of developers, brokers, property portals and in-house sales teams mean that prospects are contacted by many parties, making response time, relevance and follow-up important. Market share data for the firm are not public and are therefore not reported.

The author's assignment covered two residential projects and one commercial project, with daily outbound calling to assigned databases, supported by team meetings that set weekly targets. Calling followed a prescribed approach and scripts, with regional languages used where suitable. Executives recorded outcomes and next steps in a CRM for newer leads.

VII. DATA ANALYSIS AND INTERPRETATION

A. Lead-Data Categories

Table I lists the six categories of lead data handled. They differ in the prior relationship with the prospect, from no relationship (raw data) to a completed visit (VDNB).

TABLE I LEAD-DATA CATEGORIES HANDLED

Category	Purpose in the pre-sales process
Fresh raw data	Cold outbound calling to identify new prospects
Area (pincode) data	Targeting prospects near a project location
Other-project data	Reconnecting with prospects tied to other projects
Non-connected data	Re-attempting contacts not reached earlier
Fresh CRM leads	Prompt follow-up of newly generated enquiries
VDNB data	Re-engaging prospects who visited but did not book

Source: author's internship records.

B. Estimated Weekly Funnel

Table II presents the recorded and recalled quantities, and Table III derives ratios. With 150 calls per day and 20–30 answered, between 13.3% and 20.0% of calls reached a person. Under the five-day assumption this implies 750 calls, 100–150 answered calls and 3–4 scheduled visits per week (Fig. 1).

TABLE II REPORTED AND RECALLED QUANTITIES

Item	Value	Status
Calls dialled per day	≈150	Recalled
Calls answered per day	20–30	Recalled
Visits scheduled per week	3–4	Recalled
Site visits recorded	10 (6 res., 4 comm.)	Recorded
Bookings	1 (from VDNB data)	Recorded
Assignment period	≈2 months	Recorded

"Recorded" = stated in the internship report; "Recalled" = estimate by the author.

TABLE III DERIVED RATIOS (ESTIMATES)

Ratio	Estimate
Answered ÷ dialled	13.3%–20.0%
Weekly calls (5-day week)	≈750
Weekly answered calls	100–150

Ratio	Estimate
Scheduled visits ÷ answered	2.0%–4.0%
Scheduled visits ÷ dialled	0.40%–0.53%

Derived from Table II; assumes a five-day calling week. Ranges pair the lowest and highest plausible values and are not confidence intervals.

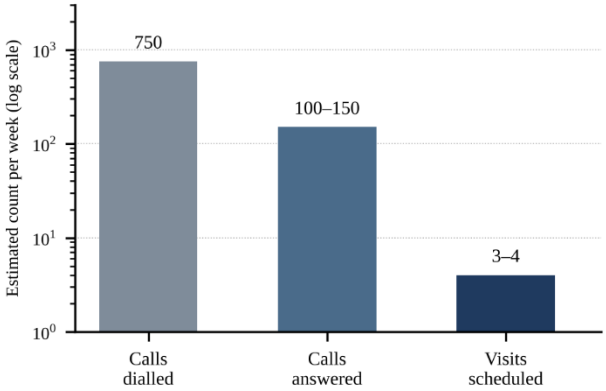


Fig. 1. Estimated weekly call funnel (five-day week assumed). Bars show upper bounds; labels show ranges. Log scale used because stage sizes differ by more than two orders of magnitude.

C. Interpretation of the Funnel

The funnel shows that the steepest loss occurs before any conversation takes place: between 80% and 87% of calls did not connect or were quickly declined. Among answered calls, only about 2–4% became scheduled visits, which is consistent with a considered, high-value purchase and, as the next subsection shows, with a poor database. Because a visit requires a prior conversation, increasing the number of answered calls is likely to raise visits more reliably than refining the pitch alone. This is an inference from the funnel arithmetic and the author's observation, not a tested causal claim.

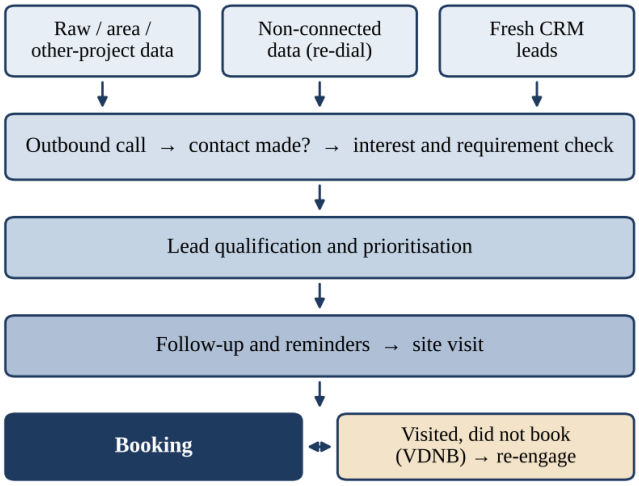


Fig. 2. Conceptual lead-quality funnel integrating lead-data categories, qualification, follow-up, site visit and VDNB re-engagement (author's synthesis from the case).

D. Why Leads Failed: Lead-Quality Problems

The author's main observation is that the low number of bookings was driven chiefly by poor leads. Many numbers were not answered. Some calls connected to people outside the state who had no practical interest in a Pune property. Much of the data was old, and many contacts could not be reached or were no longer relevant. Among those who did answer, common replies were that they had already purchased, that they had been looking two years earlier and the plan had since been dropped, or that the location was not worth the price being asked. Even when a visit was agreed, scheduled visits were frequently declined with replies such as "not possible to come". Table IV classifies these recurring causes; Fig. 3 shows how they converge on low yield.

TABLE IV RECURRING CAUSES OF NON-CONVERSION (QUALITATIVE)

Observed cause	Quality dimension	Funnel stage affected
Numbers not answered; unreachable	Reachability	Contact
Data too old to contact	Currency	Contact
Contact outside the state or visit range	Geographic fit	Qualification
"Already purchased"	Intent status	Qualification

Observed cause	Quality dimension	Funnel stage affected
"Looking two years ago"; "plan dropped"	Intent status	Qualification
"Location not worth the high price"	Value fit	Post-pitch
Visits declined: "not possible to come"	Visit feasibility	Scheduling

Source: author's recollection of recurring responses. No frequencies were recorded, so none are implied.

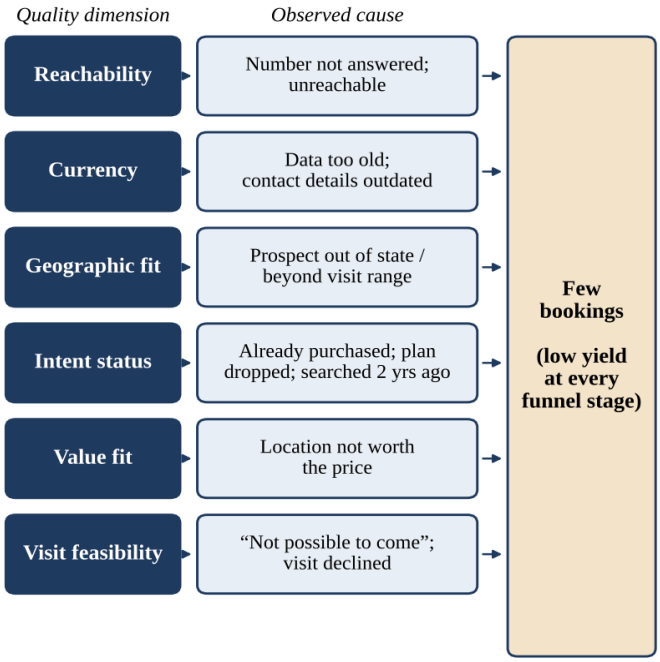


Fig. 3. Lead-quality dimensions, observed causes and their combined effect on bookings (author's synthesis).

Two features of the taxonomy deserve emphasis. First, four of the six dimensions (reachability, currency, geographic fit and intent status) concern whether the lead should have been in the database at all and are determined before a call is placed. They are therefore a data-management problem. Second, only value fit and visit feasibility are partly open to persuasion, and even these depend on the prospect's circumstances. Seen this way, the single booking is less a measure of selling skill than of how few usable leads the database contained.

VIII. RESULTS AND DISCUSSION

A. Connectivity and Currency (RQ1)

Roughly one in five to one in seven dialled calls was answered. Consistent with the CRM view that information management determines performance [1], this finding suggests that data quality, call timing and re-attempt rules matter at least as much as script quality (P1). Reporting only "calls made" would overstate productive effort; connect rate and visits per answered call are more informative indicators.

B. Differences Across Lead Categories (RQ2)

The author's recollection indicates that site visits arose from every category, roughly one to two per category, even though categories differed in effort. Fresh CRM leads had expressed recent interest, whereas raw data had none; VDNB leads had already experienced the project; non-connected data had the least information. Although counts per category are too small to rank them statistically, the pattern supports P3 and echoes the call in lead-qualification research for differentiated treatment of leads [5], [6].

C. Lead Quality as the Main Explanation (RQ3)

The taxonomy in Table IV supports P2. A prospect who has already purchased, who abandoned the search, or who lives out of state cannot be converted regardless of call quality, and a prospect who finds the location poor value for the price is unlikely to be moved by a call. This reframes the "low conversion" problem: the weak result was largely determined upstream by the database. In the language of lead qualification [6], the database was loose at entry and the cost of that looseness was borne by the caller, who spent most of the day screening out unusable contacts. Monat's argument that lead-quality errors distort resource allocation [5] fits this pattern, although his model was developed for industrial leads and is not tested here.

D. VDNB Re-Engagement (RQ4)

The only recorded booking came from VDNB data. A single case proves nothing about rates, yet it illustrates that a prospect who has visited and not booked may be dormant rather than lost, as the win-back literature suggests for lapsed customers [3], [4]. VDNB prospects also differ from other categories on the quality dimensions: they are reachable, current, local and have shown intent, so they fail the screening tests far less often. This supports P4. Hesitation after a visit plausibly reflects price, comparison with other projects or timing. Trust and sustained commitment, central to relationship marketing [8], are a plausible mechanism, but the case did not measure them.

E. Follow-Up and Site-Visit Coordination

Reminders before visits and communication after them were part of the routine. Given that 3–4 visits were scheduled weekly but ten visits were recorded in the report's tables over about two months, the figures indicate that many scheduled visits were not completed or were not personally handled

by the author; the case does not allow a show-up rate to be computed. Recording scheduled versus completed visits is therefore a basic measurement need (P5).

TABLE V PROPOSITIONS AND EVIDENCE FROM THE CASE

Prop.	Evidence in this case	Status
P1	13–20% connect rate; old and unreachable data	Illustrated
P2	"Already purchased", "plan dropped", out-of-state contacts	Illustrated
P3	Visits from all six categories; unequal readiness	Weakly illustrated
P4	One booking from VDNB data	Single case
P5	3–4 visits scheduled weekly vs. 10 recorded in total	Illustrated

"Illustrated" means consistent with the author's observations; no proposition has been statistically tested.

IX. RESEARCH IMPLICATIONS

A. Managerial

The findings imply that effort is best invested before the call. Table VI converts each quality dimension into a screening or data-hygiene action. Table VII lists the minimum indicators that a team should track.

TABLE VI QUALITY DIMENSIONS AND RECOMMENDED ACTIONS

Dimension	Recommended action
Reachability	Validate numbers before dialling; re-attempt at different times; retire repeatedly unreachable numbers
Currency	Prefer recent enquiries; date-stamp every record; refresh or discard data past an age limit
Geographic fit	Filter by pincode, city and state before assignment
Intent status	Ask early whether the person is still searching or has bought; record the answer
Value fit	Match prospects to projects by budget and location; use a short qualifying question on budget
Visit feasibility	Confirm visit by message and reminder; offer alternative dates; record reasons for refusal

Recommendations are the author's inferences and have not been tested.

TABLE VII MINIMUM INDICATORS FOR A PRE-SALES TEAM

Indicator	Definition
Connect rate	Answered calls ÷ calls dialled
Valid-lead rate	Qualified prospects ÷ answered calls
Visit scheduling rate	Visits scheduled ÷ answered calls
Visit completion rate	Visits completed ÷ visits scheduled
VDNB recovery rate	Bookings from VDNB ÷ VDNB leads worked
Rejection-reason mix	Share of each coded refusal reason

Rates should be reported by data category and by week.

Beyond data screening, teams should maintain a documented VDNB programme with timed follow-ups, enforce CRM discipline so that outcomes and next-call dates are recorded for every lead, and communicate accurate project and registration information in line with the regulatory emphasis on transparency [9]. Performance reviews should avoid rewarding call volume alone, since high volume on poor data produces effort without yield.

B. Academic

The case offers a measurable vocabulary (connect rate, valid-lead rate, visit completion rate, VDNB recovery rate), a six-dimension taxonomy of lead quality and five propositions that larger, logged-data studies can test. It also suggests that lead-scoring research should add reachability, currency and geographic suitability as explicit screening dimensions for consumer real estate.

X. LIMITATIONS AND FUTURE RESEARCH

The study has substantial limitations. It rests on one intern, one firm and about two months. Key figures are recalled estimates, not system logs, and weekly values assume a five-day week. The internship report contained inconsistent entries for some figures (for example, the number of site visits and the booking value), so uncertain values were either reported as ranges or omitted. The single recorded booking cannot support any conversion rate. The causes in Table IV are recalled and were not counted, so their relative importance is unknown. No customer-side data were collected. Findings are exploratory and not generalisable.

Future work should use CRM exports with timestamps and outcome codes for several firms; code every call outcome and refusal reason so that the cause taxonomy can be quantified; compare connect and visit rates across data categories and data ages with appropriate statistical tests; test the propositions through data-cleaning interventions, call-time experiments and structured VDNB follow-up trials; and add buyer-side interviews to examine trust, price-location judgement and decision hesitation.

XI. CONCLUSION

This case study documents how database telecalling operates in Pune residential and commercial pre-sales. About 150 calls per day produced only 20–30 conversations and three to four scheduled visits per week. The principal explanation offered is poor lead quality: unreachable and outdated contacts, prospects outside the state, buyers who had already purchased or dropped their plans, price-location mismatch and declined visits. These problems arise largely before the call, which suggests that investment in data screening and cleaning may raise yield more than additional calling. VDNB prospects appear to remain re-engageable. The findings are exploratory, but they identify measurable indicators and testable propositions, and they argue for segmentation, lead screening, disciplined CRM recording and systematic post-visit follow-up in real estate pre-sales.

REFERENCES

[1] A. Payne and P. Frow, "A strategic framework for customer relationship management," *J. Marketing*, vol. 69, no. 4, pp. 167–176, Oct. 2005, doi: 10.1509/jmkg.2005.69.4.167.

[2] K. N. Lemon and P. C. Verhoef, "Understanding customer experience throughout the customer journey," *J. Marketing*, vol. 80, no. 6, pp. 69–96, Nov. 2016, doi: 10.1509/jm.15.0420.

[3] J. S. Thomas, R. C. Blattberg, and E. J. Fox, "Recapturing lost customers," *J. Marketing Res.*, vol. 41, no. 1, pp. 31–45, Feb. 2004, doi: 10.1509/jmkr.41.1.31.25086.

[4] C. Homburg, W. D. Hoyer, and R. M. Stock, "How to get lost customers back? A study of antecedents of relationship revival," *J. Acad. Marketing Sci.*, vol. 35, no. 4, pp. 461–474, 2007.

[5] J. P. Monat, "Industrial sales lead conversion modeling," *Marketing Intell. Plan.*, vol. 29, no. 2, pp. 178–194, 2011, doi: 10.1108/02634501111117610.

[6] M. A. Jolson, "Qualifying sales leads: The tight and loose approaches," *Ind. Marketing Manage.*, vol. 17, no. 3, pp. 189–196, 1988, doi: 10.1016/0019-8501(88)90002-8.

[7] J. Järvinen and H. Taiminen, "Harnessing marketing automation for B2B content marketing," *Ind. Marketing Manage.*, vol. 54, pp. 164–175, 2016, doi: 10.1016/j.indmarman.2015.07.002.

[8] R. M. Morgan and S. D. Hunt, "The commitment-trust theory of relationship marketing," *J. Marketing*, vol. 58, no. 3, pp. 20–38, Jul. 1994, doi: 10.1177/002224299405800302.

[9] Government of India, *The Real Estate (Regulation and Development) Act, 2016*, Act No. 16 of 2016, enacted Mar. 25, 2016. [Online]. Available: https://indiacode.nic.in/handle/123456789/2158