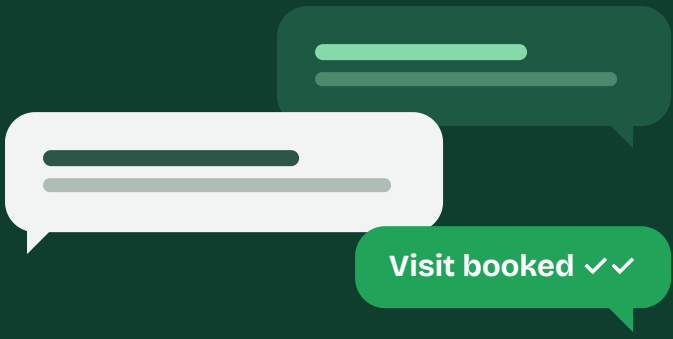
SAMWAD

WHITEPAPER · REAL ESTATE · 2026



From Enquiry to Site Visit: The WhatsApp Playbook for Real Estate

How Indian developers and brokers use WhatsApp to answer enquiries, share brochures, book site visits and follow up until the booking, all in one chat.

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5 stages
The buyer journey, from enquiry to booking

3 automations
The first ones to switch on, step by step

4 results
From a SAMWAD real estate customer story

30 days
A week-by-week launch plan

EXECUTIVE SUMMARY

Most property enquiries go cold before the first site visit.

A homebuyer in India compares several projects at once. The developer or broker who replies first, sends the right brochure and makes the visit easy to book is the one the buyer remembers.

This guide shows how to run the buyer journey on WhatsApp with SAMWAD, from the first enquiry to the booking amount: five stages, the first three automations, sample templates and a 30-day plan.

In this guide

- The five-stage buyer journey, with one number to watch at each stage
- Three automations: enquiry reply, site-visit booking and visit reminder
- Sample Utility and Marketing templates, with buttons
- Results from a SAMWAD real estate customer and a 30-day plan

WHY NOW

The case for WhatsApp

$650B

India's real estate market value in 2025, in US dollars[1]

71%

of residential sales in Q1 2026 were homes priced above ₹1 crore[2]

Sources. 1, 2. IBEF (India Brand Equity Foundation), Indian Real Estate Industry, 2026, ibef.org/industry/real-estate-india.

The usual way

Calls, email and a callback list. Enquiries wait in a spreadsheet for a callback. Brochures go by email and get lost. Site visits are fixed over calls and missed without a reminder.

On WhatsApp

One chat, enquiry to booking. The buyer gets project details, the brochure and a visit slot in the same chat. Your sales team sees the whole conversation when they take over.

THE FRAMEWORK

The buyer journey on WhatsApp

Most teams use WhatsApp only after a call. Run all five stages in one chat and every brochure, question and visit sits in one thread when sales picks it up.

See the full buyer journey:
samwad.tech/industries/whatsapp-for-real-estate

Stage 01

Enquiry

A buyer asks about a project, a price or availability.

SAMWAD: Replies with project details; qualifies budget, location, BHK and timeline. The Voice AI Agent answers WhatsApp calls about the project.

Watch: Enquiries qualified on the same day

Stage 02

Brochure

The buyer wants to see the project before visiting.

SAMWAD: Brochure, floor plans, price sheet, location map and photos, with a “Book a site visit” button.

Watch: Brochures that lead to a visit request

Stage 03

Site visit

The buyer picks a day to see the project.

SAMWAD: Slot booking in a WhatsApp form; a reminder the day before with the location; reschedule in a couple of taps.

Watch: Visits completed vs booked

Stage 04

Follow-up

The buyer has visited and is deciding.

SAMWAD: A post-visit message; serious buyers go to sales with the full chat; launch and price updates for opted-in buyers.

Watch: Visits that become bookings

Stage 05

After booking

The buyer has paid the booking amount.

SAMWAD: Booking amount and instalment reminders; KYC and booking documents collected in a WhatsApp form; reminders can go out from your CRM.

Watch: Instalments paid on time

DESIGN RULE

Make the next step one tap. End each message with the visit, the document or the payment the buyer needs next.

PLAYBOOK

The first three automations to switch on

01 · Enquiry

Enquiry reply

Trigger: a buyer messages about a project.
Message: project details, then questions on budget, location, BHK and timeline.
Next: qualified buyers go to sales.

Watch: enquiries qualified on the same day

02 · Site visit

Site-visit booking

Trigger: the buyer taps “Book a site visit”.
Message: a WhatsApp form with project, date and time slot.
Next: a confirmation with the location.

Watch: visits booked per 100 enquiries

03 · Site visit

Visit reminder

Trigger: the day before the visit.
Message: the time, the location and a reschedule button.
Next: the buyer confirms, or picks a new slot in the chat.

Watch: visits completed vs booked

SAMPLE TEMPLATES

What the messages look like

Illustrative examples. Each {{1}}, {{2}} is a variable filled in for each customer.

ILLUSTRATIVE

Hi {{1}}, your site visit to {{2}} is booked for {{3}} at {{4}}. Our team will meet you there.

View location

Reschedule

Utility template · site_visit_confirmation

ILLUSTRATIVE

Hi {{1}}, your visit to {{2}} is tomorrow at {{3}}. Reply here if you need directions.

Is there parking at the site?

Utility template · site_visit_reminder

ILLUSTRATIVE

Hi {{1}}, new prices for {{2}} apply from {{3}}. Tap below to see the updated price sheet.

See price sheet

Stop updates

Marketing template · price_update (opted-in only)

Which template is which

Visit confirmations, visit reminders and instalment reminders are **Utility** templates: booking information only, no offers. Launch news, price updates and new projects are **Marketing** templates, sent only to buyers who opted in. After a buyer messages you, you can reply freely for 24 hours; then you need an approved template.

SAGE, SAMWAD's AI advisor, checks templates against Meta's rules before you submit.

PROOF

What it looks like in practice

A SAMWAD customer story from a property platform that connects owners with buyers and tenants in major Indian cities.

20x
return on investment (ROI)

2.8x
more property sales

25%
better customer engagement

Minutes
to share a listing, down from 3 days

The customer

A well-known real estate platform that connects property owners with buyers and tenants, for homes and commercial spaces, in major Indian cities. It wanted faster listings and better communication with buyers.

What they switched on

SAMWAD on the WhatsApp Business API for real estate, with listings shared on WhatsApp and automated reminders that helped more buyers turn up for property visits.

Source. Results as published in the SAMWAD case study "How WhatsApp streamlined real estate operations with 20x ROI", samwad.tech/case-studies/whatsapp-api-real-estate-success. The customer's name is not disclosed.

WHAT TO MEASURE

Your scorecard

Same-day qualification — Daily

Enquiries qualified on the day ÷ all enquiries

Visit booking rate — Weekly

Site visits booked ÷ qualified enquiries

Visit show-up rate — Weekly

Visits completed ÷ visits booked

Visit-to-booking rate — Monthly

Bookings ÷ visits completed

On-time instalments — Monthly

Instalments paid by the due date ÷ instalments due

Opt-out rate — After each campaign

Opt-outs ÷ marketing messages sent

YOUR FIRST 30 DAYS

A 30-day launch plan

WEEK 1

Connect and approve

Connect your WhatsApp Business number. Load project details, brochures and floor plans. Submit visit templates to Meta.

WEEK 2

Answer and qualify

Turn on the enquiry reply and the four qualifying questions. Send qualified buyers to sales with the full chat.

WEEK 3

Book visits

Switch on the site-visit form, the confirmation and the day-before reminder. Track who turns up.

WEEK 4

Follow up

Add the post-visit message and instalment reminders. Send a first launch update to opted-in buyers. Review the scorecard.

Before week 1: your systems

Connect your CRM or sales tools through ready-made integrations, the API, webhooks or Zapier, so bookings and reminders flow both ways. Have brochures, floor plans and price sheets ready as PDFs.

BEFORE YOU GO LIVE

Consent and content checklist

- [ ] **Opt-in:** ask in the chat or on your enquiry form, say what you'll send, and keep a record.
- [ ] **Template categories:** visit and instalment reminders as Utility; launches and price updates as Marketing.
- [ ] **Opt-out:** add a "Stop updates" button to Marketing templates and act on it straight away.
- [ ] **Quiet hours:** send updates in the daytime, not late at night or early in the morning.
- [ ] **Handover:** price negotiation, legal and home-loan questions go to your sales team with the full chat.

Five questions to ask any WhatsApp platform

1. Is it built on the official WhatsApp Business API?
2. Can it send brochures, floor plans and location pins in the chat?
3. Can buyers book and reschedule a site visit without a call?
4. Can the AI agent hand a buyer to sales with the full history?
5. Will someone help me write templates and get them approved?

Book your first site visit on WhatsApp this week.

Book a demo and we'll set up your first automation from this guide with you, or start a free trial.

Demo calendly.com/avaneet-techelligenceai/book-a-demo
Trial app.samwad.tech/register
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Phone +91 77668 81755