



Winstone Properties Ltd.

AGENT CRM USAGE GUIDELINE

Winstone CRM is now officially ready for Agent operations. This guideline defines the standard workflow every Winstone sales agent must follow — every working day.

Version 1.1 · Last updated 1 October 2026

crm1.winstonebd.com/inventory



Scan to open CRM inventory

STANDARD OPERATING WORKFLOW

CORE WINSTONE CONNECT WORKFLOW

The primary Agent workflow must remain, in this exact order:



This is the standard operating workflow for every Winstone CRM Agent

EVERY WORKING DAY

AGENT DAILY WORKFLOW



LOGIN

01

- Login only with the agent's own assigned account.
- Never use another agent's account.



ASSIGNED LEADS

02

- Start work from the leads assigned to the agent.
- Review the customer's information before making contact.
- Do not create duplicate leads.



CUSTOMER CALL

03

- Use the Winstone Connect calling workflow to contact the customer.
- Review the lead information before calling.
- Ensure every relevant customer interaction is properly recorded.



POST-CALL SMART REPORT — MANDATORY

04

- After every customer call, the Agent must complete the Post-Call Smart Report.
- No completed call should remain without a proper post-call update.



FOLLOW-UP

05

- Record all required follow-ups in the CRM.
- Maintain the correct follow-up date/action.
- Do not leave important follow-ups pending without an update.



SITE VISIT / BOOKING

06

- When a customer requests or completes a site visit, update the relevant activity/status in the CRM immediately.
- When a customer proceeds toward a booking, update the relevant activity/status in the CRM immediately.

☰ POST-CALL SMART REPORT — REQUIRED FIELDS

The report should contain, where applicable, all of the following — completed after every customer call:

Call Status	Lead Category	Customer Interest	Requirement
Customer Response	Next Action	Follow-up Requirement	Follow-up Date / Action

NON-NEGOTIABLE

IMPORTANT RULES

- ⚠ Never create duplicate leads.
- ⚠ Never intentionally modify incorrect customer information.
- ⚠ Never access or operate another Agent's leads or account.
- ⚠ Never change CRM system-level settings.
- ⚠ Never attempt an unofficial workaround for a technical issue.
- 🚩 Report technical problems to IT/HQ.

OFFICIAL COMMUNICATION

ONE SYSTEM. ONE RECORD.

Please use Winstone CRM consistently so that all customer interactions, follow-ups, site visits, bookings, and sales progress remain accurately recorded and visible to the appropriate HQ / management team.

ZAHID HASAN EMON

Head of IT, Winstone Properties Ltd.