CRM Dataflow Documentation

AchieveX's CRM software consists of four separate modules-

1. Lead generation and lead management section
2. Proposal management section
3. Project/Workflow management section
4. Human resource management section

Lead management section:

This section mainly deals with leads and their life cycle. Let us divide this lead management procedure into few pointers

1. A lead is getting registered in leads section. There will be one leads manager who will be assigning the leads to their respective team/BDE. The assigned BDE will call those leads and they will be selecting the status of the lead. There will be four status of any lead (**Interested, Not interested, On Hold, Couldn't connect**).
2. If the lead is having a status of **couldn't connect/hold**- The assigned BDE will set a reason for not connecting and will set a follow up task along with date and time for the next call disposition.
3. If the lead is **not interested**- The assigned BDE will disqualify the lead with proper notes and the lead will be stored in the database for further email marketing procedure.
4. Now if the lead is **interested**- The assigned BDE will set a virtual or physical appointment. If the client is not available at the scheduled time then appointment will be rescheduled. If the client is having an appointment with the BDE then there will be a follow up task along with a detailed description of requirements and also demo date and time. If the rescheduled appointment is also rejected by the client then the BDE will disqualify the lead with proper notes and the lead will be stored in the database for further email marketing procedure. If the rescheduled appointment is getting conducted then the BDE will add a follow up task along with a detailed description of requirements and also demo date and time.
5. Now if the client has accepted the **demo**- a contract form/ NDA form will be generated. The form will consist of activity date/time, negotiation terms, total price, tenure or agreement, signed contract, token amount, pending amount, timeline. If the client is not accepting the contract or there is some kind of price issue then the assigned BDE will be sending a follow up email and a revised version of the contact along with revised price estimation. If the client is accepting the final revised proposal then the lead status will be changed to customer.

6. Once the lead has been flagged as **customer** – he/she will be directed to project management section with a client branch access to monitor the workflow and status of the project.

Proposal management section:

A cloud proposal management will be the easiest thing to keep track of all the upcoming projects and rejected projects. Proposal management will be executed as follows:

1. Admin persona will be configuring the cloud server for proposal and a dummy format of the proposal will be there on the cloud. After submitting certain amount of data for the required proposal, the proposal will be sent to the client with a toggle of accept and reject at their end.
2. Once the client is accepting the proposal an acknowledgement will be sent to the admin as well as client's end also mentioning about the further procedures.
3. Once the client is rejecting the proposal an acknowledgement will be sent to the admin end and a feedback form will be shown to the client for stating what are the flaws they found in the proposal or reason for rejection. The assigned BDE will monitor the reasons and will work accordingly
4. Once the client is on boarded with the company they will be redirected to project management section where they can monitor -> day to day work report, complete graphical representation, user invoice, user details, credits, contract period etc.

Project/Workflow management section:

Project management is the new hype of any company that has been developing day to day reporting in an innovative way. We will be using micro services architecture for project management method. The whole workflow of the management will be as follows:

1. Once the proposal is completed and NDA and all the processes has been done the client will be directed to project management section
2. Admin will create two branches-> one will be the master branch and one will be client branch. Master branch will be managed by the assigned project manager and client branch will be managed by the Person of contact from client's end.
3. The assigned project manager will divide the whole project into different stages like Requirements gathering, System architecture design, UI design, Frontend Development, Backend Development, Testing, Integration, Training and Deployment.

4. This entire upper mentioned task will be divided into several sub tasks which will be called as sprints. Now everyday there will be existing scrum stand-ups and backlogs will be decided as per non completed sprints.
5. The project manager will look for whether the existing sprints has been completed or not->for completed sprints the tasks will be updated and dashboard will generate the completed sprints reports. If some sprints have been left then there will be backlogs which will indicate that previous tasks need to be completed.
6. If the client is asking for some new sprints or if there is some project amendment -> new sprints will be created. Then at the scrum stands the PM will check for any backlogs, if backlogs found then the follow up tasks will be created of if the sprints have been completed then dashboards will show completed sprints details and completion time. Notification will be sent to the admin as well as Client also.

Creation of KANBAN Board:

Kanban board has been introduced to ease the work of backlog management as well as project sprint management. There are four total stages of KANBAN board- TO-DO, Work in Progress, Testing, Done.

1. Assigned project manager will be creating a TO-DO list mentioning all the product backlogs as tasks and sub tasks. Inside the task bar there will be task details, completion time, expected end date and assignee name.
2. The assigned developer will start the task and change the flag into Work in Progress (WIP).
3. After completion of the work the assigned tester will test the application or software and change the flag into Testing.
4. Once all the processes are done the status of the backlogs will be flagged as Done.

This KANBAN board is a to and fro method which indicates that the status of any sprint can be changed anytime while processing the project. Developer can push any code in the board as well as UI designer can store designs, tester can upload test cases also. The next task will not start if the existing task is not complete.