

BCH Lead Management System – Changes & Improvements Report

This document reviews the current BCH Lead Management System (Flows + PRD) and lists the required changes, optimizations, and critical improvements before development and deployment. The system design is already strong, but a few strategic fixes will make it production-ready, scalable, and safer for real-world store usage.

1. Overall System Status

The system architecture is highly well-structured with a complete funnel from Content → Call → IVR → Qualification → Assignment → Follow-up → Walk-in → Purchase. However, it is approximately 85–90% production-ready and requires key refinements in automation logic, UX resilience, and operational safeguards.

2. Critical Improvements (High Priority)

1. Duplicate Lead Handling Logic: If the same number calls multiple times within 30 days, the system should reopen the existing lead instead of creating a new one. This prevents CRM clutter and maintains salesperson continuity. 2. WhatsApp Compliance & Consent: Auto-WhatsApp is used heavily across flows, but explicit consent capture and approved template handling must be implemented to avoid WhatsApp API restrictions or bans. 3. Offline Mode for Store Usage: Since store staff will use mobile PWA devices, offline caching and auto-sync are essential due to unstable internet conditions in retail environments. 4. Role-Based Access Control: Different access levels must be defined: - BDC: Qualification only - Sales: Assigned leads only - Manager: Full visibility and reassignment. This ensures data security and operational discipline.

3. Important System Optimizations

1. IVR Flow Simplification: Current IVR has multiple steps (language, location, age, interest). This may increase call drop rates. Recommendation: Merge age + interest into one step to reduce call duration and improve engagement. 2. Missed Call Auto-Recovery: An automated WhatsApp message should be triggered within 10 seconds of a missed call with quick-reply buttons (Electric, Gear, Kids, Service). This can recover 20–30% of otherwise lost leads. 3. Hot Lead Alert Engine: If budget > 30K + visit intent = soon + specific model mentioned, trigger an urgent notification to top closer. This increases high-ticket conversion significantly.

4. Walk-In Module Enhancements

1. QR-Based Walk-in Capture: Instead of manual phone entry, install a QR code at billing/store entry that opens a lead capture form or WhatsApp automation. 2. Faster Floor Matching: Auto-match walk-ins by phone number instantly and alert the assigned salesperson in real-time for personalized interaction.

5. Operational & Scaling Improvements

1. BDC Team Capacity Planning: Even after IVR filtering, estimated qualified calls may still be 6,000–14,000/month. Recommendation: Plan for 3 BDC agents instead of 2 for sustainable operations. 2. Callback Queue SLA Logic: Add auto-escalation if callbacks are not completed within defined time windows (15–30 minutes). 3. Load Balancing Enhancement: Include dynamic workload distribution based on active leads and conversion performance, not just category routing.

6. UX & Adoption Improvements (Very Important)

1. Maintain Zero-Typing Design: Keep chip-based inputs, dropdowns, and voice-to-text as core UX since staff typing capability is limited. 2. One-Tap Actions: Call, WhatsApp, follow-up outcome, and visit marking should remain one-tap actions to ensure daily adoption. 3. Push Notification Discipline: Add structured reminders: - 2-hour contact reminder - 4-hour escalation - Follow-up due alerts

7. Final Recommendation

The current BCH Lead Management System is strategically strong and customized to real business pain points such as high call volume, waste leads, low follow-up, and staff usability constraints. After implementing the listed improvements—especially duplicate lead logic, offline mode, WhatsApp compliance, and IVR simplification—the system will be fully production-ready and capable of significantly improving conversion, accountability, and content ROI tracking.