🏄 BREEZE CRM - COMPLETE PRODUCT REQUIREMENTS DOCUMENT

Version: 2.0
Date: January 13, 2026
Status: Ready for Development
Product: Breeze CRM - "Sales Made Breezy"

📋 EXECUTIVE SUMMARY

Vision

Breeze is an **AI-first CRM** that eliminates manual data entry, unifies all customer conversations, and provides real-time insights to help sales teams close more deals faster.

Core Value Proposition

- **Zero Manual Data Entry**: AI automatically captures 95%+ of customer data
- **Omnichannel Inbox**: All conversations (Gmail, LinkedIn, WhatsApp, calls) in one place
- **Built-in Attribution**: Track what actually drives revenue, not just leads
- **AI-Powered Insights**: Deal health scores, next actions, pattern discovery
- **10x Faster Setup**: Deploy in 15 minutes vs 6+ months for Salesforce

Target Market

- **Primary**: B2B SaaS companies with 10-100 sales reps
- **Secondary**: Performance marketing agencies, B2B service businesses
- **Initial Focus**: Sales teams frustrated with Salesforce/HubSpot complexity

Business Model

- **Pricing**: $99-299/user/month (vs $1,200+/user/year for Salesforce)
- **Year 1 Target**: 500 customers, $50K-75K MRR, <5% churn
- **Revenue Drivers**: Seat expansion, premium features, API usage

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🎯 KEY DIFFERENTIATORS

vs Salesforce

- ✅ **10x faster setup** (15 min vs 6+ months)
- ✅ **1/10th the cost** ($99/mo vs $1,200+/year)
- ✅ **95% auto data capture** vs 40% with Salesforce
- ✅ **AI-first** (not AI-bolted-on)
- ✅ **Omnichannel inbox** (Salesforce has no unified inbox)

vs HubSpot

- ✅ **Better AI** (autonomous actions vs basic automation)
- ✅ **True attribution** (multi-touch vs last-click only)
- ✅ **LinkedIn/WhatsApp native** (HubSpot charges extra)
- ✅ **Mobile-first** (HubSpot mobile app is weak)

vs Close.com / Pipedrive

- ✅ **Enterprise features** at SMB pricing
- ✅ **Built-in attribution** (they have none)
- ✅ **AI agents** (they have basic automation)
- ✅ **Better integrations** (20+ channels vs 5-8)

🏗️ TECHNICAL ARCHITECTURE

Stack Overview

```
Frontend:
- Next.js 14 (App Router)
- TypeScript
- Tailwind CSS + shadcn/ui
- Zustand (state management)
- TanStack Query (server state)
- Socket.io-client (real-time)

Backend:
- Node.js + Express
```

```
- TypeScript
- REST + GraphQL APIs
- Socket.io (WebSockets)
- Bull (job queue)
- Redis (caching, pub/sub)

Database:
- PostgreSQL 15 (Prisma ORM)
- Elasticsearch (search)
- TimescaleDB (time-series)
- Pinecone (vector embeddings)

AI/ML:
- OpenAI GPT-4 Turbo
- Claude 3.5 Sonnet
- Whisper API (voice)
- GPT-4 Vision (OCR)
- OpenAI Embeddings

Infrastructure:
- Vercel (web app hosting)
- AWS ECS (API containers)
- AWS RDS (PostgreSQL)
- AWS ElastiCache (Redis)
- AWS S3 (file storage)
- CloudFront (CDN)

Integrations:
- Gmail/Outlook APIs
- LinkedIn API (via Proxycurl)
- WhatsApp Business API
- Clearbit (enrichment)
- Twilio (SMS, voice)
- Stripe (payments)
```

System Architecture Diagram

```
┌─────────────────────────────────────────────────────────────┐
│                    CLIENT LAYER                            │
│  ┌───────────────────────────────────────────────────────┐  │
│  │  Next.js App (Vercel)                               │  │
│  │  - App Router                                       │  │
│  │  - Server Components                                │  │
```

```
│  │  - API Routes                 │  │
│  └──────────────────────────────────────────────────────┘  │
└────────────────────────────────────────────────────────────┘
                │
                ▼
┌────────────────────────────────────────────────────────────┐
│           API LAYER                 │
│  ┌──────────────────────────────────────────────────────┐  │
│  │ Express API (AWS ECS)           │  │
│  │ - REST endpoints                │  │
│  │ - GraphQL server                │  │
│  │ - WebSocket server              │  │
│  │ - Background jobs               │  │
│  └──────────────────────────────────────────────────────┘  │
└────────────────────────────────────────────────────────────┘
                │
                ▼
┌────────────────────────────────────────────────────────────┐
│           DATA LAYER                │
│  ┌───────────────┬───────────────┬───────────────────┐  │
│  │ PostgreSQL  │ Elasticsearch│  Redis       │  │
│  │ (RDS)       │ (search)    │ (cache/pubsub) │  │
│  └───────────────┴───────────────┴───────────────────┘  │
│  ┌───────────────┬───────────────┐          │
│  │ Pinecone    │  S3         │          │
│  │ (vectors)   │  (files)    │          │
│  └───────────────┴───────────────┘          │
└────────────────────────────────────────────────────────────┘
```

▦ INFORMATION ARCHITECTURE

Site Map

```
/
├── / (Landing page - not logged in)
├── /login
├── /signup
├── /app
│   ├── /dashboard (Overview)
│   ├── /next-actions ⭐ (P0 - Most Important Page)
│   ├── /inbox (Omnichannel conversations)
```

```
│   ├── /contacts
│   │   ├── / (List view)
│   │   ├── /[id] (Detail view)
│   │   ├── /new (Create contact)
│   │   ├── /import (Import contacts)
│   │   └── /data-health (Data quality center)
│   ├── /companies
│   ├── /deals
│   │   ├── / (Pipeline kanban)
│   │   ├── /[id] (Deal detail)
│   │   ├── /new (Create deal)
│   │   └── /forecast (Forecast view)
│   ├── /ai-agents
│   │   ├── / (All agents)
│   │   ├── /new (Create agent)
│   │   ├── /templates (Template library)
│   │   ├── /knowledge-base (Train agents)
│   │   └── /[id] (Agent detail & settings)
│   ├── /workflows
│   │   ├── / (All workflows)
│   │   ├── /new (Visual builder)
│   │   └── /templates (Pre-built templates)
│   ├── /analytics
│   │   ├── /revenue (KPIs & trends)
│   │   ├── /attribution (Multi-touch attribution)
│   │   ├── /insights (AI-discovered patterns)
│   │   ├── /forecast (Pipeline forecast)
│   │   └── /team (Rep performance)
│   ├── /integrations
│   │   ├── / (Connected integrations)
│   │   ├── /marketplace (Browse integrations)
│   │   └── /developer (API docs, webhooks)
│   ├── /settings
│   │   ├── /profile
│   │   ├── /team
│   │   ├── /channels
│   │   ├── /data-quality
│   │   ├── /ai-settings
│   │   ├── /notifications
│   │   ├── /billing
│   │   ├── /security
│   │   ├── /api-keys
```

```
│   │   └── /integrations
│   └── /focus (Full-screen task execution)
```

🎨 DESIGN SYSTEM

Philosophy

Inspired by Frappe CRM: Clarity over cleverness, speed over beauty, data density over whitespace.

Visual Design

```
Colors:
- Primary (Breeze Blue): #3B82F6
- Success: #10B981
- Warning: #F59E0B
- Danger: #EF4444
- Gray Scale: #F9FAFB → #111827

Typography:
- Font: Inter (system fallback: -apple-system, SF Pro)
- Sizes: 12px (small) | 14px (body) | 16px (large) | 20px (h3) | 24px (h2) | 36px (h1)

Spacing:
- Base: 4px
- Scale: 4, 8, 12, 16, 24, 32, 48, 64px

Components:
- Buttons: Primary, Secondary, Outline, Ghost (4 sizes: sm, md, lg, xl)
- Inputs: Text, Select, Textarea, Date, Multi-select
- Cards: Flat (no shadow), Hover (subtle shadow), Active (border highlight)
- Badges: Success, Warning, Danger, Info, Neutral
- Avatars: Circular, with fallback initials

Layout:
- Sidebar: 240px (collapsed: 64px)
- Header: 64px
- Content max-width: 1440px
- Responsive breakpoints: 768px, 1024px, 1280px
```

Component Library

Using **shadcn/ui** as base (Tailwind + Radix UI):

- Pre-built accessible components
- Customizable with Tailwind
- Copy-paste approach (not npm dependency)
- Components used: Button, Card, Badge, Avatar, Dropdown, Modal, Tabs, Table, Form inputs, Toast notifications

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💡 CORE FEATURES SPECIFICATIONS

1. NEXT ACTIONS PAGE (`/app/next-actions`) ⭐ P0

Purpose: The MOST IMPORTANT page - shows reps exactly what to do next, prioritized by AI.

Key Sections:

1. **Today's Focus** (Top 3 highest-priority items)
2. **Urgent** (Require immediate attention)
3. **Due Today** (Tasks/follow-ups due today)
4. **Upcoming** (Next 3 days)
5. **AI Suggested** (Opportunities AI discovered)
6. **Quick Wins** (Low effort, high impact)
7. **Progress Today** (What you've completed)

AI Prioritization Algorithm:

```typescript
Priority Score = (Deal Value × Close Probability × Urgency Factor) / (Effort in Minutes / 60)

Where:
- Deal Value: $0-1M+ (normalized 0-100)
- Close Probability: 0-100% (from AI deal health score)
- Urgency Factor:
  - Urgent: 3x
  - Important: 2x
  - Normal: 1x
- Effort: Estimated minutes to complete action
```

Action Types:

- 📧 Send follow-up email

- 📞 Make call
- 🤝 Schedule meeting
- 📄 Send proposal
- 🔥 Rescue at-risk deal
- ✅ Complete task
- 💰 Close deal

Batch Actions:

- "Send all pending emails" (AI-drafted)
- "Make all calls" (call queue mode)
- "Complete quick tasks" (<5 min each)

Target Metrics:

- Users complete 8+ actions per day
- 70%+ completion rate
- <30 seconds to understand what to do next

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2. INBOX PAGE (`/app/inbox`)

Purpose: Unified view of ALL customer conversations across every channel.

Dynamic Sub-Navigation:

- Shows ONLY connected integrations
- Example: If you have Gmail + LinkedIn → tabs show [All] [📧 Gmail] [💼 LinkedIn] [+ Add]
- If 10+ platforms → group by category: [All ▼] [📧 Email ▼] [💬 Social ▼] [🎯 Ads ▼]

Supported Integrations (20+):

Tier 1: Email

- Gmail (Google Workspace)
- Outlook (Microsoft 365)
- Yahoo Mail
- ProtonMail
- Custom IMAP

Tier 2: Business Messaging

- LinkedIn Messages & InMail
- WhatsApp Business API
- Slack (DMs & mentions)
- Microsoft Teams
- Telegram

Tier 3: Social Media

- Facebook Messenger (Business)
- Instagram DMs (Business)
- Twitter/X DMs
- Reddit Messages
- Discord

Tier 4: Forums & Communities

- Stack Overflow
- Hacker News
- Quora
- ProductHunt

Tier 5: Ad Platforms (Lead Forms)

- Facebook Lead Ads
- LinkedIn Lead Gen Forms
- Google Ads Lead Forms
- TikTok Lead Gen

Layout:

```
┌──────────┬──────────────┬──────────────┬──────────┐
│ SIDEBAR │ CONVERSATION │ THREAD VIEW │ CONTACT │
│ Filters │ LIST │ (Unified across │ SIDEBAR │
│ (15%) │ (30%) │ all channels) │ (Info + AI) │
│ │ │ (35%) │ (20%) │
└──────────┴──────────────┴──────────────┴──────────┘
```

Key Features:

- ☑ Real data only (no fake/sample data after integration)
- ☑ Unified threading (all channels with one contact in single thread)
- ☑ Real-time sync (< 5 min latency via webhooks)
- ☑ Bidirectional (view AND reply from Breeze)
- ☑ AI analysis on every message (sentiment, intent, entities)
- ☑ Smart reply suggestions
- ☑ Message templates

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3. CONTACTS PAGE (`/app/contacts`)

Purpose: Central hub for managing all people and companies.

List View Features:

- Infinite scroll / pagination (50 contacts per page)
- Real-time search (Elasticsearch full-text)
- Advanced filters (20+ criteria)
- Bulk actions (assign, tag, merge, delete, export)
- Data quality banner (shows issues to fix)
- Custom views (save filter combinations)

Contact Detail View:

- **Header:** Avatar, name, title, company, contact methods
- **AI Summary:** GPT-4 generated summary of engagement
- **Tabs:**
    1. Overview (contact info, company info, CRM data, tags)
    2. Activity (timeline of all interactions)
    3. Deals (associated opportunities)
    4. Tasks (open & completed)
    5. Notes (internal notes)
    6. Files (attachments, proposals, contracts)

Data Quality Features:

- Email verification (NeverBounce API)
- Phone validation (Twilio Lookup API)
- Duplicate detection (fuzzy matching algorithm)
- Smart merge (AI suggests which data to keep)
- Auto-enrichment (Clearbit + LinkedIn + Proxycurl)
- Completeness scoring (0-100%)
- Scheduled refresh (every 90 days)

Import/Export:

- CSV / Excel / JSON formats
- Field mapping interface
- Duplicate detection during import
- Validation & preview before import
- Export with custom field selection

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4. DEALS PAGE (`/app/deals`)

Purpose: Visual pipeline management + AI-powered deal intelligence.

Pipeline Kanban View:

```
┌─────────────┬─────────────┬─────────────┬─────────────┬─────────────┐
│ QUALIFICATION│   DEMO    │  PROPOSAL  │ NEGOTIATION│   WON   │
│   $450K   │   $380K   │   $520K   │   $280K   │  $150K   │
│  8 deals  │  6 deals  │  4 deals  │  3 deals  │ 2 deals  │
├─────────────┼─────────────┼─────────────┼─────────────┼─────────────┤
│ [Deal Card] │ [Deal Card] │ [Deal Card] │ [Deal Card] │ [Deal ] │
│ [Deal Card] │ [Deal Card] │ [Deal Card] │ [Deal Card] │ [Deal ] │
│ [Deal Card] │ [Deal Card] │ [Deal Card] │          │        │
│    ...    │    ...    │          │          │        │
└─────────────┴─────────────┴─────────────┴─────────────┴─────────────┘
```

Deal Card Contents:

- Company name + logo
- Deal value
- Close date

- Owner avatar
- Health score (0-100) with 🔥 ⚠️ 🔴 indicator
- Days in stage
- Last activity timestamp
- Quick actions (•••)

Deal Health Scoring:

```typescript
Health Score (0-100) = Base (50) + Modifiers

Positive Modifiers (max +50):
+ Sentiment trending positive: +20
+ High engagement (fast replies): +15
+ Multiple stakeholders engaged: +15
+ Pricing discussed: +10
+ Contract requested: +10
+ Decision timeline clear: +10

Negative Modifiers (max -50):
- Ghosting (no reply >5 days): -20
- Negative sentiment: -20
- Competitor mentioned: -15
- Timeline pushed back: -10
- Stakeholder left company: -10
```

Deal Detail View:

- **Overview Tab:**
  - Value, stage, close date, probability
  - Contact(s) involved
  - Deal timeline (created → present)
  - Custom fields
  - Tags
- **Activity Tab:**
  - Unified timeline (emails, calls, meetings, notes)
  - Sentiment chart over time
  - Engagement metrics

- **AI Analysis Card:**
  - Health breakdown (what's working / what's risky)
  - Risk factors (ghosting, competitor, timeline slip)
  - Positive signals (engagement, budget confirmed, champions)
  - Recommended next actions (prioritized)
- **Notes Tab:** Internal notes visible only to team
- **Files Tab:** Proposals, contracts, case studies shared

Forecast View:

```
Pipeline Forecast (Q2 2026)

Weighted Pipeline: $1.2M
├── Commit: $450K (90%+ probability)
├── Best Case: $820K (70%+ probability)
├── Most Likely: $640K (50%+ probability)
└── Worst Case: $380K (30%+ probability)

Historical Accuracy: 87% (AI learns from past quarters)
```

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5. AI AGENTS PAGE (`/app/ai-agents`)

Purpose: Autonomous AI assistants that handle tasks 24/7.

Pre-Built Agents (6 types):

1. Receptionist Agent 🤖

- Routes conversations to right team member
- Captures basic lead info (name, email, company, needs)
- Answers common questions (pricing, features, availability)
- Books discovery calls
- Creates contact + deal + task for assigned rep

2. SDR Agent 🎯

- Qualifies inbound leads using BANT framework:
  - Budget: Confirmed or range
  - Authority: Decision maker or stakeholders

    - Need: Pain points and must-haves
    - Timeline: Urgency and deadline
- Scores leads (0-100)
- Books qualified demos
- Disqualifies politely when not a fit

3. Deal Analyst Agent 📊

- Monitors all active deals
- Calculates health scores (0-100)
- Identifies risk factors (ghosting, competitors, timeline)
- Predicts close probability
- Recommends actions (call champion, send case study, etc.)
- Sends alerts for at-risk deals

4. Marketing Analyst Agent 📈

- Analyzes multi-touch attribution
- Discovers patterns (what content/channels drive wins)
- Calculates campaign ROI
- Identifies underperforming assets
- Recommends budget reallocation

5. Follow-Up Agent 💬

- Drafts personalized follow-up emails
- Analyzes conversation context
- Suggests optimal send time
- Includes relevant attachments
- Matches sender's writing style

6. Coach Agent 🏆

- Analyzes rep performance (win rate, cycle time, activity)
- Compares to top performers
- Identifies strengths & weaknesses
- Recommends specific improvements
- Suggests training content

- Generates coaching talking points for managers

Agent Configuration:

- Personality (tone, style, greeting, signature)
- Capabilities (answer, collect, update, book, send, create, trigger, analyze)
- Channels (email, LinkedIn, WhatsApp, SMS, webchat)
- Handoff rules (when to escalate to human)
- Actions (auto-create contact/deal, assign owner, notify team)
- Knowledge base (documents, website, conversations, FAQs)

Template Library:

- 50+ pre-built agent templates
- Industry-specific (SaaS, B2B Services, Agency, eCommerce)
- Use case-specific (Lead Gen, Support, Analysis, Follow-up)
- Community templates (user-created, shared)

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6. ANALYTICS PAGE (`/app/analytics`)

Revenue Tab:

- KPIs: Total revenue, pipeline value, win rate, avg deal size, sales cycle
- Trend charts (MoM, QoQ, YoY)
- Revenue by stage (funnel chart)
- Top performers leaderboard
- AI insights (discoveries, anomalies, recommendations)

Attribution Tab:

```
Multi-Touch Attribution Models:

1. First-Touch (who brought them in?)
2. Last-Touch (what closed the deal?)
3. Linear (equal credit to all touchpoints)
4. Time-Decay (more recent = more credit)
5. U-Shaped (40% first + 40% last + 20% middle)
6. W-Shaped (30% first + 30% qualification + 30% close + 10% rest)
7. Custom (define your own model)
```

Channel Performance:

Channel	Leads	Pipeline	Revenue	ROI
LinkedIn Ads	450	$2.5M	$850K	17.2x
Organic Search	380	$1.8M	$720K	∞
Webinars	120	$1.2M	$480K	24.8x
Referrals	89	$950K	$420K	∞
Google Ads	340	$680K	$180K	2.8x ⚠️
Cold Email	250	$450K	$95K	1.9x ❌

AI Insights Tab: Automatically discovers patterns:

- "Deals with 3+ stakeholders close 78% faster"
- "Webinar attendees have 2.3x higher win rate"
- "Mentions of 'Salesforce' increase close probability by 45%"
- "Deals that go dark for >5 days have 67% lower win rate"
- "LinkedIn is 4x more effective than email for first touch"

Forecast Tab:

- Weighted pipeline by probability
- Commit / Best / Most Likely / Worst case scenarios
- AI confidence level
- Historical accuracy tracking
- Rep-by-rep forecast breakdown

Team Tab:

- Rep performance comparison
- Activity metrics (calls, emails, meetings, demos)
- Win rate by rep
- Avg deal size by rep
- Sales cycle by rep
- Coaching opportunities (AI-identified)

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7. WORKFLOWS PAGE (`/app/workflows`)

Purpose: Visual workflow builder for automation.

Visual Canvas:

- Drag-and-drop interface
- Node-based workflow design
- Real-time validation
- Test mode (run with sample data)

Node Types:

Triggers:

- New contact created
- Deal stage changed
- Email received
- Form submitted
- Contact score changed
- Deal went cold (>X days no activity)
- Custom field updated

Actions:

- Send email (template or AI-generated)
- Create task
- Update field
- Add tag
- Assign owner

- Create deal
- Send Slack notification
- HTTP webhook
- Run AI agent

Conditions:

- If/else branches
- Field comparisons
- Score thresholds
- Time-based conditions
- AND/OR logic

Pre-Built Templates:

- Lead qualification sequence
- Demo follow-up automation
- Deal health monitoring
- Re-engagement campaign
- Competitor alert workflow
- Meeting no-show follow-up

📊 DATA MODELS

Core Entities

User:

```typescript
```

```
{
  id: string
  email: string
  name: string
  avatar?: string
  role: 'admin' | 'user' | 'viewer'
  workspaceId: string
  settings: {
    notifications: NotificationPreferences
    timezone: string
    language: string
  }
  createdAt: Date
  lastActive: Date
}
```

Contact:

```typescript
{
  id: string
  workspaceId: string
  firstName: string
  lastName: string
  email: string
  phone?: string
  title?: string
  companyId?: string
  linkedinUrl?: string
  source: string
  ownerId?: string
  lifecycleStage: 'lead' | 'mql' | 'sql' | 'opportunity' | 'customer'
  leadScore: number // 0-100
  tags: string[]
  emailVerified: boolean
  phoneValid: boolean
  dataCompleteness: number // 0-100
  enrichedAt?: Date
  customFields: Record<string, any>
  createdAt: Date
  updatedAt: Date
}
```

Company:

```typescript
{
  id: string
  workspaceId: string
  name: string
  domain?: string
  industry?: string
  size?: string
  revenue?: string
  website?: string
  phone?: string
  address?: string
  city?: string
  country?: string
  employees?: number
  founded?: number
  techStack?: string[]
  logo?: string
  enrichedAt?: Date
  createdAt: Date
}
```

Deal:

```typescript
```

```
{
  id: string
  workspaceId: string
  name: string
  value: number
  stage: string
  probability: number // 0-100
  expectedCloseDate: Date
  contactIds: string[]
  companyId?: string
  ownerId: string
  source: string
  tags: string[]
  healthScore: number // 0-100
  daysInStage: number
  lastActivity?: Date
  customFields: Record<string, any>
  createdAt: Date
  updatedAt: Date
  closedAt?: Date
  lostReason?: string
}
```

Activity:

```
typescript
```

```
{
  id: string
  workspaceId: string
  type: 'email' | 'call' | 'meeting' | 'note' | 'linkedin' | 'whatsapp'
  direction: 'inbound' | 'outbound'
  contactId?: string
  dealId?: string
  subject?: string
  body?: string
  duration?: number // minutes
  sentiment?: 'positive' | 'neutral' | 'negative'
  aiAnalysis?: {
    intent: string
    entities: Record<string, any>
    topics: string[]
  }
  createdAt: Date
  createdBy: string
}
```

Message (Inbox):

```
typescript
```

```
{
  id: string
  workspaceId: string
  platform: 'gmail' | 'linkedin' | 'whatsapp' | ...
  externalId: string
  conversationId: string
  from: Participant
  to: Participant[]
  subject?: string
  body: string
  bodyHtml?: string
  direction: 'inbound' | 'outbound'
  status: 'sent' | 'delivered' | 'read' | 'failed'
  attachments: Attachment[]
  sentiment?: string
  intent?: string
  entities?: Record<string, any>
  sentAt: Date
  receivedAt: Date
  readAt?: Date
  syncedAt: Date
}
```

🔌 KEY INTEGRATIONS

Email Integrations

Gmail:

- OAuth 2.0 authentication
- Gmail API v1
- Scopes: gmail.readonly, gmail.send, gmail.modify
- Sync: Initial 90 days, then incremental via History API
- Push notifications via Pub/Sub for real-time
- Rate limits: 25,000 requests/day per user

Outlook:

- Microsoft Graph API
- OAuth 2.0 with Microsoft identity platform

- Permissions: Mail.Read, Mail.Send, Mail.ReadWrite
- Sync: Initial via delta query, then webhooks
- Rate limits: 10,000 requests/10 min per app

LinkedIn Integration

Proxycurl API (LinkedIn data without official partnership):

- Profile enrichment
- Company data
- Employment history
- Education
- Skills
- Rate limit: 300 requests/month on free tier

Note: Full LinkedIn Messaging API requires partnership application.

WhatsApp Business API

Meta Business Platform:

- WhatsApp Business API
- Webhook setup for receiving messages
- Template messages for outbound
- Media upload/download
- Rate limits: 1,000 conversations/24hr (tier 1)

Enrichment: Clearbit

Person API:

```
GET https://person.clearbit.com/v2/people/find?email=sarah@example.com

Response:
{
  name: { fullName, givenName, familyName },
  email,
  avatar,
  employment: { name, title, role, seniority },
  company: { name, domain, industry, employees, revenue, logo }
}
```

Company API:

```
GET https://company.clearbit.com/v2/companies/find?domain=example.com

Response:
{
  name, legalName, domain, description,
  category: { industry, subIndustry },
  metrics: { employees, revenue, estimatedAnnualRevenue },
  tech: [technologies used]
}
```

Pricing: $99/month for 2,500 enrichments

🚀 DEVELOPMENT ROADMAP

Phase 1: MVP (Months 1-3)

Month 1:

- ✅ Authentication & onboarding
- ✅ Dashboard (basic KPIs)
- ✅ Contacts CRUD (list, detail, create, edit, delete)
- ✅ Deals kanban (drag-and-drop pipeline)
- ✅ Gmail integration (OAuth + sync)
- ✅ Basic AI (sentiment analysis on messages)

Month 2:

- ✅ Next Actions MVP (priority list)
- ✅ Deal health scoring
- ✅ AI draft messages
- ✅ Auto-logging (create activities from emails)
- ✅ Contact enrichment (Clearbit)
- ✅ Workflows (basic automation)
- ✅ Mobile responsive design

Month 3:

- ✅ Data quality center (duplicates, validation)
- ✅ Team management (invite, roles, permissions)
- ✅ Billing (Stripe integration)
- ✅ Beta launch to 20 customers
- 🎯 **Target:** $10K-20K MRR, <30 min time to value

Phase 2: Public Launch (Months 4-6)

Month 4:

- ✅ Inbox (unified conversations)
- ✅ LinkedIn integration (Proxycurl)
- ✅ WhatsApp Business API
- ✅ Multi-channel threading
- ✅ Real-time (WebSockets)
- ✅ Voice transcription (Whisper API)

Month 5:

- ✅ AI Agents (6 pre-built types)
- ✅ Visual workflow builder
- ✅ Advanced workflow triggers & actions
- ✅ Smart follow-ups (AI-generated)
- ✅ Meeting scheduling (calendar integration)

Month 6:

- ✅ Product Hunt launch
- ✅ HubSpot/Salesforce integrations (import/export)
- ✅ API documentation
- ✅ Help center (knowledge base)
- ✅ Public launch to 100 customers
- 🎯 **Target:** $20K-30K MRR, <5% churn

Phase 3: Scale (Months 7-12)

Months 7-8: Marketing Attribution

- ✅ Multi-touch attribution (7 models)
- ✅ Google Ads integration
- ✅ Facebook Ads integration
- ✅ LinkedIn Ads integration
- ✅ Campaign ROI dashboard
- ✅ Pattern discovery (AI insights)

Months 9-10: Mobile Apps

- ✅ Native iOS app
- ✅ Native Android app
- ✅ Voice logging (tap to record)
- ✅ GPS check-ins
- ✅ Offline mode
- ✅ Business card scanner (OCR)

Months 11-12: Enterprise Features

- ✅ Focus Mode (distraction-free task execution)
- ✅ Calendar blocking (AI schedules focus time)
- ✅ Advanced forecasting (scenario modeling)
- ✅ Rep coaching (performance analysis)
- ✅ Commission calculator
- ✅ Multi-client management (agencies)
- ✅ White-label reporting
- ✅ SSO (SAML, OIDC)
- 🎯 **Target:** 500 customers, $50K-75K MRR, 4.8+ G2 rating

📈 SUCCESS METRICS

Product Metrics

- **DAU/MAU:** >60% daily active, >85% weekly active
- **Time in app:** >2 hours per day (engaged users)

- **Feature adoption:**
  - Next Actions: 95%+ usage
  - Inbox: 90%+ usage
  - AI Agents: 70%+ create at least 1 agent
  - Workflows: 60%+ create at least 1 workflow
  - AI drafts: 70%+ use weekly
- **Retention:** >95% at month 12

Acquisition Metrics

- **Signups:** 500 per month by month 12
- **Trial-to-paid:** 20% conversion
- **Time to value:** <30 minutes (first "aha" moment)
- **Onboarding completion:** >80%

Business Metrics

- **MRR:** $50K-75K by month 12
- **ARR:** $600K-900K by end of year 1
- **LTV:CAC:** >3:1
- **Churn:** <5% monthly
- **Expansion revenue:** 20% of total revenue
- **Avg deal size:** $2,500-5,000 per year

Impact Metrics (Value to Customers)

- **Time saved:** 18+ hours per week per rep
- **Data capture:** 95%+ of customer interactions logged
- **Deals closed:** 25% increase vs previous CRM
- **Response time:** 3x faster (6 hours → 2 hours avg)
- **Pipeline visibility:** 100% of deals tracked with health scores

Customer Satisfaction

- **NPS:** >50
- **CSAT:** >4.5/5
- **G2 rating:** >4.8/5

- **Support response:** <2 hours
- **Feature request response:** <7 days

🎯 GO-TO-MARKET STRATEGY

Target ICP (Ideal Customer Profile)

Primary: B2B SaaS companies

- Company size: 10-100 employees
- Sales team: 5-25 reps
- ARR: $1M-$50M
- Pain: Frustrated with Salesforce/HubSpot complexity
- Budget: $10K-50K/year for CRM

Secondary: Performance marketing agencies

- Client count: 10-50 active clients
- Team: 5-30 people
- Revenue: $2M-20M/year
- Pain: Need attribution + multi-client management
- Budget: $5K-30K/year

Launch Channels

Phase 1: Beta (Months 1-3)

- Direct outreach to 100 target companies
- Personal LinkedIn connections
- Warm intros via investors/advisors
- Small private beta community (Slack)
- Goal: 20 design partners, deep product feedback

Phase 2: Product Hunt Launch (Month 6)

- Ship page: Build in public, share progress
- PH launch: Aim for #1 Product of the Day
- Reddit: r/sales, r/startups, r/SaaS (no spam, genuine value)

- LinkedIn: Founder-led content, behind-the-scenes
- Goal: 1,000+ waitlist signups, 100 trial starts

Phase 3: Content & SEO (Months 6-12)

- Blog: "CRM vs" comparison pages (Breeze vs Salesforce, etc.)
- Guides: "Ultimate Guide to Sales Attribution", "AI in Sales"
- Videos: Product demos, customer stories
- Podcasts: Guest on sales/SaaS podcasts
- Goal: 10K organic visitors/month

Phase 4: Paid Acquisition (Months 9-12)

- Google Ads: "Salesforce alternative", "CRM for small teams"
- LinkedIn Ads: Target sales managers at SaaS companies
- Retargeting: Website visitors, video watchers
- Goal: $50 CAC, 20% trial-to-paid = $250 per customer

Pricing Strategy

Free Plan: (For lead gen, not primary revenue)

- 1 user
- 100 contacts
- Basic features only
- Breeze branding
- Goal: Convert to paid within 30 days

Starter Plan: $99/user/month

- Up to 5 users
- 5,000 contacts
- All core features (Inbox, Contacts, Deals, AI drafts)
- 2 AI agents
- Basic workflows
- Email support

Professional Plan: $199/user/month (Most Popular)

- Unlimited users

- 50,000 contacts
- Everything in Starter
- Unlimited AI agents
- Advanced workflows
- Multi-touch attribution
- Priority support
- API access

Enterprise Plan: $299/user/month

- Everything in Professional
- 100,000+ contacts
- SSO (SAML, OIDC)
- Custom AI training
- Dedicated success manager
- SLA (99.9% uptime)
- White-label options

Add-ons:

- Additional contacts: $50/10K per month
- Extra enrichments: $50/1K per month
- Premium support: $500/month
- Custom development: Quote-based

🔒 SECURITY & COMPLIANCE

Data Security

- **Encryption:** AES-256 at rest, TLS 1.3 in transit
- **Access control:** RBAC with fine-grained permissions
- **Authentication:** JWT tokens, OAuth 2.0, MFA support
- **Rate limiting:** Prevents brute force attacks
- **Audit logs:** All actions tracked for 12 months

Infrastructure Security

- **Hosting:** AWS with SOC 2 compliance
- **Database:** RDS with automated backups (daily)
- **Secrets:** AWS Secrets Manager, no hardcoded keys
- **Monitoring:** CloudWatch, Sentry for error tracking
- **DDoS protection:** CloudFront + AWS Shield

Privacy & Compliance

- **GDPR:** Data export, deletion, portability, consent management
- **CCPA:** California privacy rights supported
- **SOC 2 Type II:** Planned for month 9
- **Data residency:** EU option for European customers
- **Privacy policy:** Transparent, no data selling

📚 ADDITIONAL DOCUMENTS

This PRD references these companion documents:

1. **INBOX_TAB_COMPLETE_PRD.md** (25K words)
   - Detailed inbox specifications
   - All 20+ integration implementations
   - Real-time sync architecture
2. **CONTACTS_TAB_COMPLETE_PRD.md** (35K words)
   - Complete contacts management
   - Data quality & enrichment
   - Import/export specifications
3. **Technical Architecture Document** (To be created)
   - Detailed system design
   - Database schemas
   - API specifications
   - Infrastructure diagrams
4. **Design System Guide** (To be created)

- Component library
- Style guide
- Interaction patterns
- Accessibility guidelines

☑️ DEFINITION OF DONE

A feature is "done" when:

- ☑️ Code written and reviewed
- ☑️ Unit tests passing (>80% coverage)
- ☑️ Integration tests passing
- ☑️ UI matches design (Figma)
- ☑️ Responsive on mobile/tablet/desktop
- ☑️ Accessible (WCAG 2.1 AA)
- ☑️ Performance tested (<2s page load)
- ☑️ Security reviewed (no SQL injection, XSS)
- ☑️ Documentation written (API docs, help articles)
- ☑️ QA tested on staging
- ☑️ Product manager approval
- ☑️ Deployed to production
- ☑️ Announced to users (changelog)
- ☑️ Metrics tracking in place

🎉 CONCLUSION

Breeze CRM is positioned to capture significant market share by offering:

1. **10x better user experience** than legacy CRMs
2. **AI-first approach** that actually eliminates manual work
3. **1/10th the price** of Salesforce with better features
4. **15-minute setup** vs 6-month implementations

The opportunity is massive:

- CRM market: $60B+ and growing 12% YoY
- 1M+ companies using Salesforce/HubSpot (many frustrated)
- AI is transforming sales (early movers will win)

Our advantage:

- Modern tech stack (fast iteration)
- AI expertise (OpenAI/Anthropic partnerships)
- Founder-market fit (sold CRMs for 10+ years)
- Capital efficient (AI reduces eng costs)

Next steps:

1. Build MVP (months 1-3)
2. Get 20 design partners
3. Iterate to product-market fit
4. Launch publicly (month 6)
5. Scale to $1M ARR (year 1)

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This PRD is a living document. All team members should contribute to keeping it accurate and up-to-date as we learn from customers and iterate on the product.