

Project Quotation – Digital CEO CRM

Client: [CEO/Company Name]

Prepared by: [Your Name / Your Company]

Project Scope: WhatsApp-integrated CRM for Messenger-based lead management and sales rep monitoring

Delivery Structure: Phase-wise development with clear milestones and weekly deliverables

■ Week 1-2 (Days 1–12): Core Setup & Functionality

Phases 1–3

■ Phase 1: Lead Assignment & Admin Logging

- Integrate Messenger webhook to capture new leads
- Assign leads to sales reps using round-robin logic
- Notify assigned reps via private WhatsApp message
- Log leads into a Google Sheet (rep name, timestamp, and status)

■ Phase 2: Basic Meeting Time Detection

- Detect meeting-related messages from leads with clear time mentions (e.g., “Let’s talk at 5pm”)
- Convert time to rep’s local timezone
- Log meeting time into the Google Sheet

Note: Vague or incomplete time references will be ignored to avoid false reminders

■ Phase 3: WhatsApp Reminder System

- Send automated meeting reminders to reps:
 - 24 hours before
 - 1 hour before
 - 5 minutes before
- Prompt rep after meeting time to provide an update

■ Next 20 Days: AI Monitoring & Rep Performance Tools

Phases 4–6

■ Phase 4: Follow-Up Reminders & Inactivity Checks

- Detect inactivity or lack of update on leads after 2–3 days
- Send a private WhatsApp reminder to the rep
- Prompt for adding or updating the follow-up date in Google Sheet if missing

■ Phase 5: Light Coaching + Weekly Performance Report

- Monitor rep responses for missed opportunities or weak replies
- Send helpful coaching nudges (e.g., “Ask why, don’t accept a ‘no’”)
- Track weekly rep performance: meetings booked, inactive leads, etc.
- Share leaderboard summary with badges (Top Closer, Follow-Up King, etc.)

■ Phase 6: Lead Deletion Alert System

- Detect if a Messenger conversation is deleted
- Notify admin on WhatsApp with lead details
- Log the deletion event in Google Sheet (rep name, lead ID, timestamp)

Remarks:

This structure ensures your system becomes functional early (lead handling & meeting reminders), while AI-based insights and accountability tools are layered in smoothly over time.

Each feature is designed to operate independently and improve real-time visibility, rep productivity, and lead handling discipline.