CRM Data Champion – GitHub Upload Files

# 1. CRM\_Blueprint.md

## 📌 CRM Data Fields

| Field Name | Purpose |  
|-----------------------|--------------------------------------------------|  
| Full Name | Lead identity |  
| Email / Phone | Contact |  
| Lead Source | Channel used (Facebook, LinkedIn, Email) |  
| Funnel Stage | Lead / MQL / SQL / Customer |  
| Last Contacted Date | For follow-up reminders |  
| Company Size / Revenue| For ICP matching |  
| Notes | Rep's feedback or conversation context |

## ⚙️ Automations

1. Auto-update funnel stage when a lead books a demo.  
2. Auto-tag leads by source (e.g., if Lead Source = Facebook → tag as "Paid Lead").  
3. Send reminders to sales reps if no activity within 7 days.  
4. Assign SQL leads to available sales reps automatically.

# 2. Nurturing\_Strategies.md

## 🔥 High-Intent Leads

| Channel(s) Used | Frequency | Type of Content | Success Metric |  
|-----------------------------|------------------|---------------------------------------------------|----------------------|  
| Email + WhatsApp + LinkedIn | Every 2–3 days | Case study, Founder note, Special offer | Demo rebooked or deal closed |  
  
Message Flow:  
- Day 1 (Email): Case study showing ROI  
- Day 3 (WhatsApp): “Hi, any open questions after our call?”  
- Day 5 (LinkedIn): Customer win story shared  
- Day 6 (Email): Founder’s note + limited-time offer

## ⚡ Mid-Intent Leads

| Channel(s) Used | Frequency | Content Type | Success Metric |  
|------------------|----------------|----------------------------------------------------|----------------------|  
| Email | Weekly (1x/week)| Feature explainers, use-cases, customer results | Click or Demo booked |  
  
Message Flow:  
- Week 1: “3 ways [tool] solves your problem”  
- Week 2: Feature deep dive  
- Week 3: Customer success story  
- Week 4: Demo invite

## ❄️ Low-Intent Leads

| Channel Used | Frequency | Content Type | Success Metric |  
|------------------------|----------------|-----------------------------------------------|----------------------------|  
| Email + Retargeting Ads| Every 2 weeks | Blog posts, Podcasts, Founder stories | Re-engagement or click |  
  
Message Flow:  
- Week 1: “Why I built this company” – from the founder  
- Week 3: “5 trends reshaping [industry]” blog  
- Week 5: Podcast or educational video  
- Week 7: “Want to see what we do?” – soft demo invite

# 3. Strategic\_Summary.md

A great funnel is not a static set of stages — it's a reflection of how real people discover, explore, and buy.  
  
In this project, I approached the CRM problem by first creating qualification logic that brings structure to the chaos of raw leads. By defining clear transitions between Lead → MQL → SQL → Customer, I ensured that Sales and Marketing speak the same language.  
  
For CRM configuration, I focused on data that drives decision-making — such as engagement scores, ICP fit, and last contacted date — and built automations to reduce manual effort.  
  
Nurturing strategies were then designed based on intent levels: High-Intent leads get personalized, high-frequency outreach to close; Mid-Intent leads are guided with educational content; Low-Intent leads are slowly warmed up via content and stories.  
  
The CAC:LTV dashboard offers weekly clarity to the CEO and growth team, enabling proactive, data-driven decisions.  
  
Above all, I believe data storytelling is what transforms dashboards into business action. A good CRM doesn't just track leads — it tells the truth about what’s working, what’s broken, and what’s next.  
  
This simulation is not just about CRM — it’s about thinking like a GTM leader.