CRM Structure & Flow for Workshops & Courses

Key Dashboards

1. **Sales Dashboard**
    - Handles lead generation, order updates, and client communication.
2. **Marketing Dashboard**
    - Manages research, proposal refinement, teacher recruitment, and post-workshop reviews.
3. **Tech Dashboard**
    - Handles proposal drafting, curriculum design, and workshop execution.
4. **Admin Dashboard**
    - Oversees approvals, financials, and overall CRM monitoring.

Workflow of the CRM

Phase 1: Order Generation & Proposal Drafting

1. **Sales Team (Sales Dashboard)**
    - Finds leads (colleges/institutions) interested in workshops.
    - Logs the order details (e.g., XYZ College wants a 3-day React workshop).
    - Marks the order as **"Lead Acquired"** in the CRM.
2. **Tech Team (Tech Dashboard)**
    - Views the new order.
    - Drafts an initial **workshop proposal** (topics covered, schedule, required resources).
    - Submits the draft for review.
3. **Marketing Team (Marketing Dashboard)**
    - Enhances the proposal by adding:
        - Research on the institution.
        - Memorandum of Understanding (MoU) if needed.
        - Extra value propositions.
    - Marks the proposal as **"Ready for Pricing."**

4. **Sales Team (Sales Dashboard)**
    - Adds pricing and finalizes the proposal.
    - Sales personnel send the **final proposal** to the college through the CRM email system.
    - Marks the order as **"Proposal Sent."**

Phase 2: Proposal Review & Confirmation

1. **College Decision**
    - The proposal is either **Accepted** or **Rejected.**
    - If **Rejected**, the proposal returns to respective teams for adjustments.
    - If **Accepted**, the order moves to **Execution Phase.**
2. **Marketing Team (Marketing Dashboard)**
    - Finds and finalizes **qualified teachers** for the workshop.
3. **Sales Team (Sales Dashboard)**
    - Finalizes rates for teachers.
4. **Tech Team (Tech Dashboard)**
    - Creates the final **curriculum & schedule** for the workshop.
    - Uploads training materials/resources.
    - Marks the order as **"Ready for Execution."**

Phase 3: Workshop Execution & Post-Workshop Tasks

1. **Workshop Execution (Tech Dashboard)**
    - Teachers conduct the workshop as per the finalized plan.
    - Sales team updates order status to **"In Progress."**
    - Marketing monitors engagement and ensures smooth execution.
2. **Billing & Settlements (Admin & Sales Dashboard)**
    - Sales team clears payments with the institution.
    - Admin dashboard oversees financials and approvals.

3. **Post-Workshop Review (Marketing Dashboard)**
    - Collects student/college feedback.
    - Logs reviews, improvements, and insights for future workshops.
    - Updates order status as **"Completed."**

Features in Each Dashboard

1. Sales Dashboard

- **Lead Management:** Log new institutions interested in workshops.
- **Proposal Tracking:** View the status of proposals.
- **Pricing & Quotation System:** Add workshop rates.
- **Email & Communication Module:** Send proposals and follow-ups.
- **Order Status Updates:** Track orders (Proposal Sent, Rejected, Accepted, Executed).
- **Billing & Settlement Section:** Update payment statuses.

2. Marketing Dashboard

- **Research & Proposal Enhancement:** Improve proposals with institutional research & MoUs.
- **Teacher Recruitment:** Search and assign teachers.
- **Review & Feedback Collection:** Store feedback for reference.
- **Workshop Promotion:** Optional marketing campaigns for workshops.

3. Tech Dashboard

- **Proposal Drafting:** Create initial workshop plans.
- **Curriculum Design:** Upload schedules, topics, and training materials.
- **Execution Management:** Track ongoing workshops.
- **Teacher Coordination:** Communicate with teachers for scheduling.

4. Admin Dashboard

- **Approval System:** Oversee and approve budgets, teacher payments.
- **Financials & Settlements:** Handle institution billing.
- **CRM Performance Analytics:** Monitor sales, workshop success, and feedback reports.

🚀 Advanced Features for Your CRM

🌟 Core Features & Enhancements

1️⃣ Sales Dashboard Enhancements

1. 🔍 **Smart Lead Scoring**
   - Automatically ranks colleges based on past engagement, interest level, and budget.
   - Helps sales teams prioritize high-value leads.
2. 📍 **Location-Based Lead Insights**
   - Shows a **map view** of nearby colleges for targeted sales outreach.
3. 📢 **Automated Follow-Ups & Reminders**
   - CRM sends automatic email/SMS reminders if a proposal is pending.
4. 📄 **Proposal Templates & One-Click Generation**
   - Pre-built proposal templates for different workshops (React, AI, UI/UX).
   - Saves time by auto-filling details.
5. 💰 **Dynamic Pricing Engine**
   - Auto-suggests workshop pricing based on college size, location, and past deals.
6. 📝 **E-Signature & Digital Agreements**
   - Colleges can **sign agreements digitally** through the CRM.
7. 📊 **Sales Performance Analytics**
   - Tracks how many proposals were accepted/rejected.
   - Shows which colleges converted the most.

2️⃣ Marketing Dashboard Enhancements

1. 🔬 **AI-Powered College Research**
   - Scrapes data on colleges to suggest **best-value offers**.
   - Shows insights like student count, tech stack, past collaborations.
2. 🎯 **Targeted Ad Management**

   - Connects with Facebook/Google Ads for running **customized workshop promotions**.

3. 🎥 **Video Proposal Integration**
   - Allows embedding a **personalized sales video** inside proposals for better conversion.
4. 📌 **Teacher Availability Calendar**
   - Shows which **instructors are available** for upcoming workshops.
5. 🎤 **Workshop Branding Toolkit**
   - Creates **custom flyers, social media banners** to promote workshops.

3️⃣ Tech Dashboard Enhancements

1. 📚 **AI-Powered Curriculum Generator**
   - Auto-generates a **structured syllabus** for workshops based on course type.
2. 📂 **Drag & Drop Content Management**
   - Easily upload/download presentations, videos, and assignments.
3. 💡 **Real-Time Collaboration**
   - Allows **Tech Team + Teachers** to co-edit workshop plans in real-time.
4. 📊 **Workshop Quality Score**
   - AI analyzes **student feedback & teacher performance** for future improvement.
5. 🚀 **Pre-built Quiz & Assignment Generator**
   - AI suggests **quizzes, coding assignments** for each workshop.

4️⃣ Admin Dashboard Enhancements

1. 📄 **Invoice & Payment Tracking**
   - Shows **pending payments, completed transactions, and due dates**.
2. 📅 **Auto-Scheduling System**
   - Automatically **assigns workshops** based on sales team availability.

3. 🔔 **Role-Based Notifications & Alerts**
    - Sends **custom notifications** based on user roles (Sales, Tech, Marketing).
4. 🛡 **Access Control & Permissions**
    - Restricts features based on **employee role** (e.g., Tech team can't edit pricing).
5. 📊 **Company-Wide KPI Dashboard**
    - Tracks **total revenue, successful workshops, pending proposals** in real time.

⚡ Additional High-Level Features

🚀 Automation & AI

1. **AI-Based Smart Recommendations**
    - Suggests the best **workshop package** based on a college's needs.
2. **Chatbot for Quick FAQs**
    - Helps sales teams **answer college queries instantly**.
3. **Auto Proposal Approval System**
    - If a proposal meets certain criteria, it gets **auto-approved** for faster processing.

📱 Mobile & Cloud Features

1. 📲 **Mobile App for Sales & Marketing Teams**
    - Lets field sales reps update leads directly **from their phone**.
    - Enables **on-the-go proposal approvals**.
2. ☁ **Cloud-Based File Storage**
    - Secure cloud space for **storing proposals, MoUs, and workshop materials**.
3. 🔄 **Offline Mode for Sales Teams**
    - Lets salespeople **log leads** even when offline.
    - Data syncs automatically when they reconnect.

🔗 Integrations

1. 🔗 **WhatsApp & Email CRM Integration**

- Sales reps can send workshop proposals **via WhatsApp, Email, or SMS**.

2. 📅 **Google Calendar & Zoom Integration**
   - Auto-schedules meetings & reminders.
3. 💳 **Payment Gateway Integration**
   - Enables colleges to pay workshop fees directly through the CRM.

🚀 The Final CRM Workflow (Simplified)

🔹**Step 1: Sales Team** logs a new order (e.g., College XYZ wants a 3-day React workshop).
🔹**Step 2: Tech Team** drafts the workshop proposal.
🔹**Step 3: Marketing Team** enhances the proposal (adds MoU, research, etc.).
🔹**Step 4: Sales Team** finalizes pricing & sends the proposal.
🔹**Step 5:** College **accepts/rejects** the proposal.

- If **Rejected →** Teams fix it and resend.
- If **Accepted →** Order moves to **Execution Phase**.
  🔹**Step 6: Marketing Team** assigns teachers.
  🔹**Step 7: Tech Team** prepares the curriculum & content.
  🔹**Step 8:** Workshop **Executes** successfully.
  🔹**Step 9: Sales Team** handles **billing & payments**.
  🔹**Step 10: Marketing Team** takes **post-workshop reviews** & logs insights.