AI-DRIVEN CRM FOR SMART LEAD MANAGEMENT

Team Name : Oceanic

TABLE OF CONTENTS

01 | Overview of the Problem

02 | Objective of the Solution

03 | Tech-stack

04 | Lead automation funnel

05 | Architecture

06 | Future scope

01 OVERVIEW OF THE PROBLEM

Sales teams tend to fail to effectively manage and convert leads because of numerous challenges:

1️⃣ Lead Tracking Inefficiencies – Leads come from multiple sources (websites, emails, chatbots, social media), making it difficult to track and manage them effectively.

2️⃣ Delayed Follow-ups – Without automation, leads do not receive timely responses, resulting in lost opportunities and lower conversion rates.

3️⃣ Manual Lead Prioritization – Sales reps spend excessive time assessing leads manually, often focusing on low-priority leads instead of high-potential ones.

4️⃣ Lack of Predictive Insights – Traditional CRMs provide static data but lack AI-driven insights to forecast lead behavior and optimize sales strategies.

02 OBJECTIVE OF THE SOLUTION

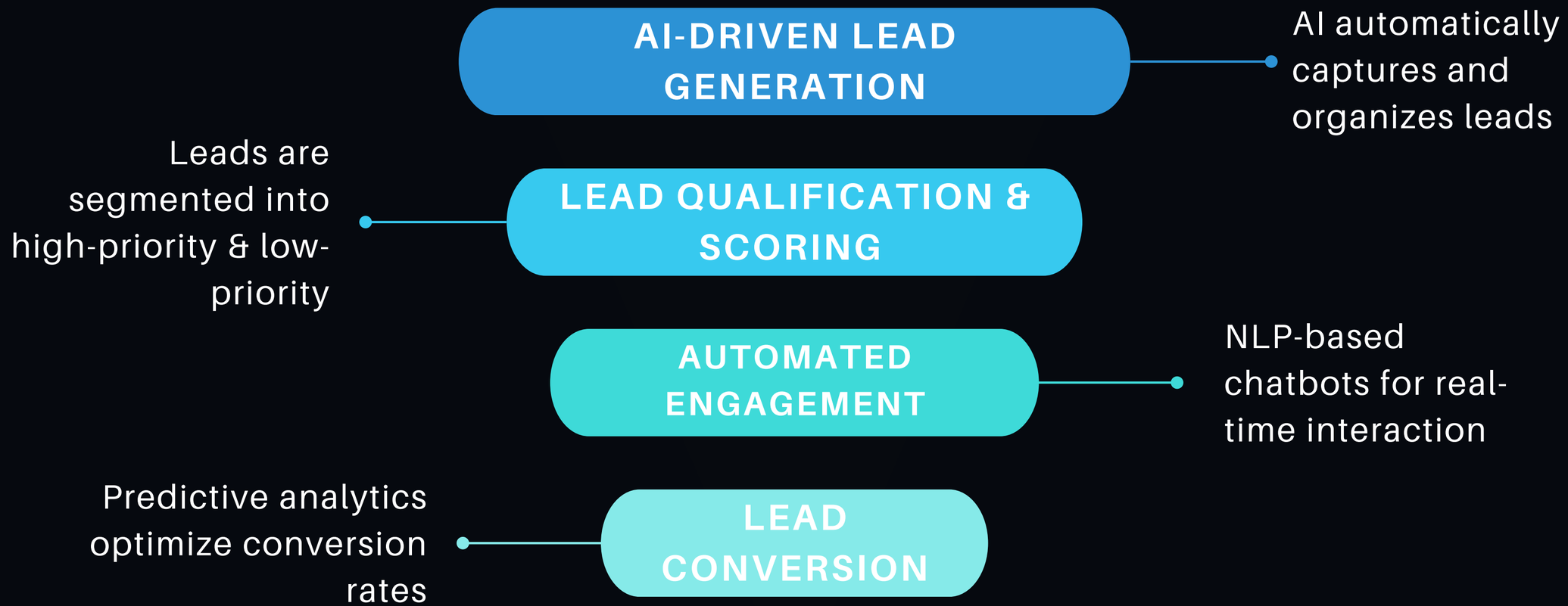
The objective is to create an AI-based CRM that maximizes sales effectiveness by streamlining lead management and fine-tuning engagement. The answer will:

1. Automatically Capture Leads
2. Automate Follow-up
3. AI-Powered Lead Prioritization
4. Provide Real-Time Insights

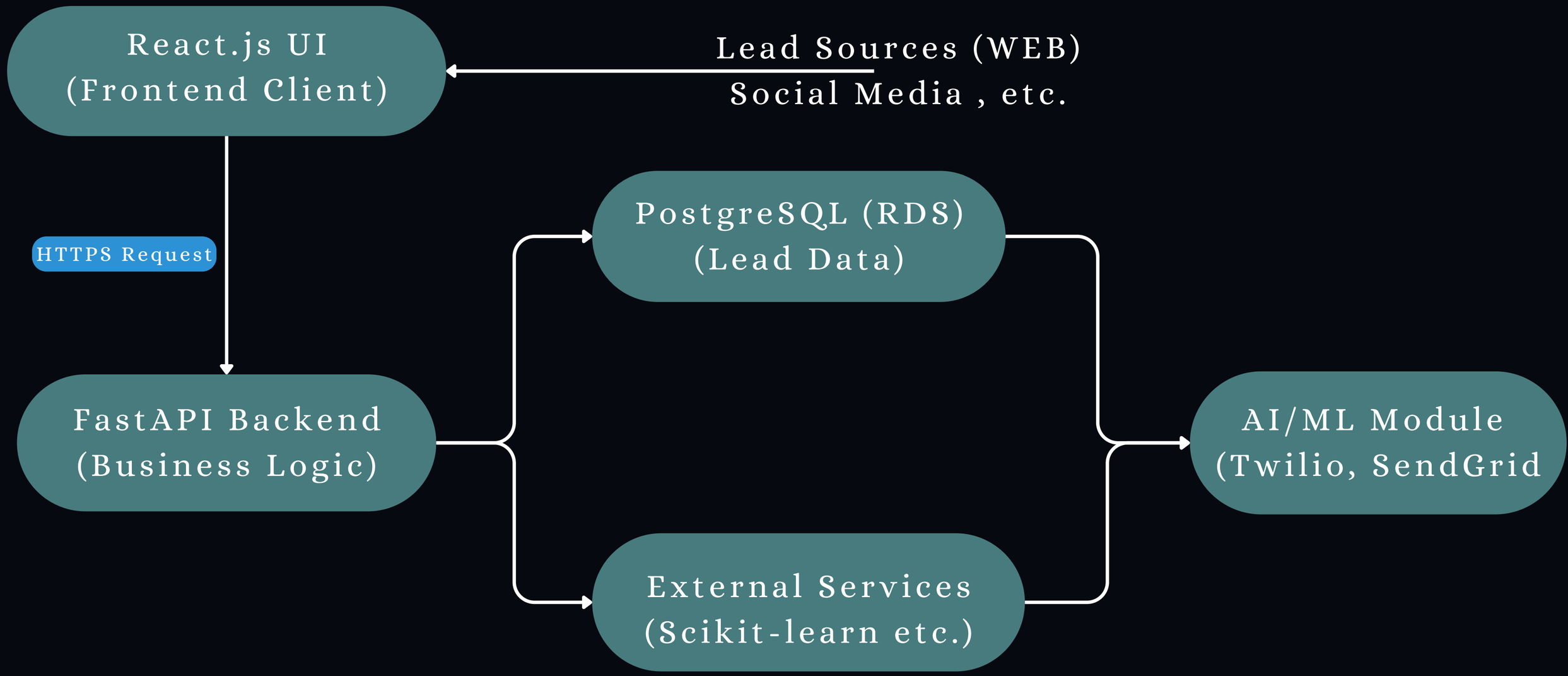
03 TECH-STACK

FRONTEND	**React.js** (Build a fast, interactive, and scalable UI)
BACKEND	**Fastapi (python)** (High-performance API for lead management) FastAPI
DATABASE	**Postgresql** (Store and manage structured lead data)
AI/ML	**scikit-learn** (AI-based lead scoring and predictive analytics)
MESSAGING	**Twilio API** (Automate WhatsApp and SMS follow-ups)
EMAIL AUTOMATION	**SendGrid** (Send automated emails for lead nurturing)
CLOUD HOSTING	**AWS** (Deploy and scale CRM services efficiently)

04 LEAD AUTOMATION FUNNEL



05 ARCHITECTURE



06 FUTURE SCOPE

1. **AI-Powered Lead Scoring & Insights**
   - Implement machine learning models to analyze lead quality and predict conversion probabilities.
2. **Cross-Platform Integration (Website + Extension)**
   - Sync data seamlessly between the web app and browser extension to offer a unified experience.
3. **Automated Lead Engagement**
   - Develop chatbots and email automation to follow up with leads without manual intervention.
4. **CRM & Third-Party Tool Integrations**
   - Provide APIs or integrations with CRMs like HubSpot, Salesforce, and Zoho for enterprise adoption.

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