Here is a **structured CRM and Marketing System Requirement Brief**. I've divided it into two main elements—**CRM Core** and **Marketing & Engagement Tools**—along with a third section for **Sales Funnel & Analytics**, and included all your fields and suggestions, refining and expanding them where needed for completeness:

**1. CRM CORE MODULE**

**1.1 Contacts**

* A central table to store all individual contact records.
* Functions: Import/export (CSV, Excel), view, edit, delete, filter, sort.
* Fields include:
  + First Name
  + Last Name
  + Email Address
  + Phone Number (with country code)
  + Country
  + Job Title
  + Webinars Attended (linked to Zoom)
  + Tags (customizable)
  + Lead Type (e.g., Customer, Partner, Vendor, Investor)
  + Lead Status (e.g., New, Contacted, Qualified, Converted, Lost)
  + Importance (e.g., High, Medium, Low)
  + Source (Manual entry or auto-tracked: Source, Medium, Campaign, UTM tracking)
* Be able to add Custom fields based on field types and load them into the tables

**1.2 Lists**

* Group contacts into lists based on:
  + Tags
  + Form submissions
  + Campaign participation
  + Source or behavior
* Lists are dynamic or static depending on the criteria.

**1.3 Leads**

* Individual lead detail page includes:
  + All profile fields (above)
  + Activity tracking on website (pages visited, time spent, device used)
  + Communication logs:
    - Call logs
    - Email logs
    - Meeting summaries
  + Lead status updates (feeds into Sales Funnel)
  + Task assignment:
    - Due dates
    - Reminders/notifications
    - Linked to calendar
  + Notes section

**1.4 Companies**

* Create/upload company profiles
* Link multiple leads to a company
* Company fields include:
  + Company name, website, industry, size, country
  + Notes
  + Tags
  + Linked deals and contacts

**1.5 Deals**

* Add, edit, and track deals
* Link to a lead and/or company
* Deal stages (configurable): e.g., Inquiry → Proposal Sent → Negotiation → Won/Lost
* Fields:
  + Deal title, value, currency
  + Subscription type (if applicable)
  + Subscription start and expiry date
  + Set reminders for renewal
  + Notes and activity log

**1.6 Booking Calendar**

* Integrated calendar booking system
  + Sync with Zoom or MS Teams
  + Generate sharable/embeddable links
  + Form to capture booking details
  + Submitted info should auto-feed into:
    - Specific contact list
    - CRM contact profile
    - Tagging (e.g., "Booked Intro Call")

**2. MARKETING & ENGAGEMENT TOOLS**

**2.1 Forms Builder**

* Drag-and-drop form creation
* Embeddable forms (iframe, script) or hosted links
* Form submissions should:
  + Feed data directly into CRM
  + Trigger tagging and list addition
  + Record source tracking data (UTM, referrer, etc.)
  + Send confirmation emails or redirects

**2.2 Social Media Scheduling Platform**

* Centralized dashboard for managing multiple social media accounts
* Functions:
  + Create, preview, and schedule posts
  + Post to Facebook, Instagram, LinkedIn, Twitter, YouTube, TikTok
  + Bulk upload of scheduled posts
  + View scheduled calendar
  + Tag users and add hashtags
  + Analytics: Reach, engagement, clicks, impressions
  + Team collaboration and approval workflows (optional)

**2.3 Integrations**

* **Zoom**: auto-log webinar participation in contact profiles
* **Google Analytics & Website Behavior Tracking**:
  + Track page visits, time on page, bounce rate per user
  + Match behavior to known CRM leads
* **Google Tag Manager**
* **Social Media Platforms**:
  + Facebook, Instagram, LinkedIn, YouTube, TikTok
  + Schedule posts
  + Auto-tag engaged leads
  + Monitor engagement metrics

**2.4 Email Marketing Automation**

* Create email templates
* Run automated sequences (drip campaigns)
* Set behavior-based triggers (e.g., open email, visit webpage)
* Schedule broadcast campaigns to segments/lists
* Open, click, bounce, unsubscribe tracking

**📈 3. SALES FUNNEL & ANALYTICS**

**3.1 Sales Funnel**

* Visual funnel tracking:
  + Number of leads per stage
  + Conversion rates
  + Time to conversion
* Allow manual and automatic stage transitions
* Highlight bottlenecks or drop-off points

**3.2 Dashboard & Reports**

* Overall summary dashboard with:
  + Leads added this week/month
  + Deals closed and revenue generated
  + Top-performing campaigns/sources
  + Sales team performance
* Exportable reports by date, user, funnel stage, etc.
* Filters: Date range, country, campaign, sales agent

**Key User Fields**

| **Field** | **Description** |
| --- | --- |
| First Name | Text field |
| Last Name | Text field |
| Email Address | Email format only |
| Phone Number | Numbers With international format |
| Country | Dropdown |
| Job Title | Free text |
| Webinars Attended | Auto-linked to Zoom |
| Tags | Custom, multi-select |
| Lead Type | Customer, Partner, Vendor, Investor |
| Lead Status | New, Contacted, Qualified, Converted, Lost |
| Importance | High, Medium, Low |
| Source | Auto-tracked via forms (UTM Source, Medium, Campaign) |
| Custom Fields | Be able to create custom fields |

**Suggested AI Agents for the CRM System**

**1. AI Lead Prioritizer**

**What it does**: Scores leads based on behavior (form fills, page visits, emails) and highlights the hottest ones.  
**Outcome**: Focus your time on the most likely to convert.

**2. AI Follow Up Assistant**

**What it does**: Suggests and schedules tasks or reminders based on lead stage or recent activity.  
**Outcome**: No lead is forgotten. Better response timing.

**3. AI Product Recommender**

**What it does**: Analyzes user interest and suggests the most relevant Potential.com product (e.g., AI Chatbot, Empowerment Platform).  
**Outcome**: Personalized offers = higher conversion.

**4. AI Campaign Assistant**

**What it does**: Helps generate and schedule targeted emails or social posts to CRM segments.  
**Outcome**: Faster content creation. More engaging campaigns.

**5. AI CRM Cleaner**

**What it does**: Fixes duplicate contacts, fills missing info, and flags bad data.  
**Outcome**: Clean data = accurate reports & better targeting.

**Sales Support Chatbot (Mia for Reps)**

**What it does**: A smart internal chatbot where your sales team can:

* Ask for lead info (e.g., “Show me John’s details”)
* Log notes, call summaries, or meeting outcomes
* Create new leads or tasks by chatting
* Update deal stages

**Outcome**: Sales reps stay productive by chatting instead of typing. All inputs auto-sync with the CRM.