

Project Atlas: Contractor Analytics Platform

Product Summary

Project Atlas is a standalone analytics platform that provides GoodLeap's external contractors with clear, actionable visibility into sales performance, operational pipeline health, and growth opportunities. The product is designed to help contractors make better decisions, close more sales, and move projects to completion faster.

Problem

External contractors currently lack a unified view of critical business data, making it difficult for contractors to:

- Understand true sales performance and conversion drivers
- Identify stalled or at-risk projects in the pipeline
- Act on data-backed growth opportunities

Target Users

Primary users within external solar and home improvement contractor organizations:

- CEO / President
- Sales Manager, Sales Representative, or Business Development Managers
- COO / Operations Manager
- Project / Construction Manager

Secondary users include GoodLeap Sales/Business Development Managers and Admin users.

Value Proposition

Project Atlas delivers actionable analytics by combining performance metrics, prioritization, and recommendations into a single, user-friendly dashboard. Contractors can quickly understand what is happening, why it matters, and what actions to take next. A core goal of Project Atlas is to move beyond passive reporting toward an agentic, decision-support experience that surfaces insights and recommends next best actions contractors can take to improve outcomes.

Proposed Solution

Prototype: <https://goodleap-dashboard-tgg2wr0k.sites.blink.new/>

A standalone, web-based analytics dashboard with modular navigation, including:

- **Overview:** Business performance highlights across sales, operations, customer experience
- **Revenue:** Annual revenue performance and trends
- **Sales Performance:** Key sales metrics and improvement recommendations
- **Growth Opportunities:** Benchmarks versus similar contractors, geographic insights, and growth recommendations
- **Projects Needing Attention:** Pipeline stage breakdowns, stalled projects, prioritized action items, improvement recommendations
- **Customer Satisfaction:** Net Promoter Score (NPS), top issues, and recommended follow-ups

Key Metrics & Data

- Sales: revenue vs. Target (total and over-time), conversion rate, referral conversion, sales cycle length, average revenue per project, cancellations, sales by department, product mix, improvement recommendations
- Operations: project milestone status (e.g., Approved, NTP, PTO), average project duration, time in stage, pipeline breakdown, risk level, open action items
- Customer: NPS, issues, warranties, customer experience improvement recommendations
- Growth: year-over-year performance, peer benchmarks, project geographics, improvement recommendations

Success Metrics

- Meaningful contractor adoption
- Sustained adoption among adopters
- Directional improvement in contractor performance (Sales pull-through, Project completion time, Customer satisfaction)

Scope & Non-Goals (Initial Phase)

In Scope:

- Analytics, insights, prioritized actions to take, and recommendations
- Action workflows tied to insights

Out of Scope (Initial Phase):

- Loan origination, underwriting, or funding workflows
- Full CRM or project management replacement
- Deep financial accounting or profitability modeling

Tech Stack

Our data platform is built on AWS and follows a lake-centric architecture. We use S3 as our primary data lake, organized using a medallion-style approach (raw through curated layers). Curated datasets are delivered to downstream systems depending on the use case, including an analytics warehouse (e.g., Redshift), BI tools, and APIs.