# Internal Staff Dashboard – Blueprint

## 🔵 Sales Rep Tab

**Purpose:** Give reps a fast, actionable view of daily goals, lead pipeline, and performance vs. team & industry benchmarks.

**Dashboard (Top Section)**

**Quick Action:** `Call Button` (1-click lead dial from dashboard)

**KPI Preview Tiles (3–5)** from Zoho + PitchProX AI:

.1 Prompt Adherence % vs. Team Avg vs. Industry Avg

.2 Deviation % & Optimal Range Hits

.3 Lead-to-Subscription % (this week)

.4 Quota Progress (X/100)

.5 Trust Gain Avg (past 7 days)

**Performance Analytics (Live/Past Interval)**

**Prompt Adherence %** = (# of AI prompt words spoken verbatim ÷ total prompt words) × 100

**Deviation %** = 100 – Prompt Adherence %

**Optimal Deviation Range** → highlight green zone

**Prompt-to-Success Correlation** → compare to team avg & industry avg

Quota Tracker w/ color-coded progress bar

Benchmark Comparison Banner (PitchProX vs. Industry)

**Call History Section**

Filterable by Date / Lead Type

Show follow-up status, notes, and AI call report quick view

**Leads Section**

KPI preview (e.g., # New Leads Today, Conversion Rate This Week, Top Lead Source)

Leads Table w/ status, next step, priority flag

**Additional Tools:**

Mail (Integrated Zoho Mail)

Calendar (Book calls, demos, follow-ups)

Video Meetings (Zoom/Google integration)

Billing (View only: customer invoice history)

Settings (Profile, role, notifications)

## 🟡 Manager Tab

**Purpose:** **M**onitor team performance, coach reps, and manage quotas.

**Dashboard**

**K**PI Tiles:

.1 Performance by Lead Source (ROI)

.2 Common Objection Frequency

.3 Rep-to-Rep Benchmarking

.4 Optimal Deviation Range (team avg)

.5 Prompt-to-Success (team avg vs. industry avg)

**Sales Rep Management**

**S**earch/Select Rep → View full analytics, call history, AI call reports

Direct Messaging to reps

Quota Management

Quota Alerts (color-coded)

**User/Subscriber Section**

**A**ctive vs. Inactive counts, last login

Subscription stats

**Additional Tools:**

**M**ail

Calendar

Video Meetings

Campaigns (Email open/click rates, active sequences)

Billing (View only)

Audit (Call report review history)

Settings

## 🔴 Admin Tab

**Purpose: Ov**ersee platform-level settings, plan management, and company usage analytics.

**Dashboard**

**Sa**me KPI tile style as Manager, but company-wide scope

Usage Analytics: API cost vs. revenue

**Plan & Pricing Control**

**Ed**it tiers, promo codes

**Company Settings**

**Em**ployee roster, email settings, signatures

**Additional Tools:**

**Ma**il

Audit Logs (compliance)

Settings

## 🟣 Auditor Tab

**Purpose: Com**pliance, SOC-2 readiness, immutable call and access logs.

**Dashboard**

**KPI** Tiles:

.1 Lead Source ROI

.2 Objection Frequency

.3 Rep Benchmarking

.4 Optimal Deviation Range

.5 Prompt-to-Success (read-only)

**Audit Report Tools**

**SOC**-2 report generator

Access logs (role-based)

Usage metrics (read-only revenue summary)

Export Data

**Sales Rep Access (Read-Only)**

**Vie**w call stats, history, AI call reports

**Additional Tools:**

**Mai**l

Audit Logs (compliance)

Settings

## 🔵 Support Tab

**Purpose: Hand**le tickets, troubleshoot accounts, assist reps and users.

**Dashboard**

**KPI** Tiles (Support ticket volume, avg resolution time, common issues)

**Ticket Management**

**Supp**ort queue & SLA tracking

**User/Sales Rep Lookup**

**Full** account details

Role-based access

**Additional Tools:**

**Mail**

Settings

## 🟣 Super Admin Tab

**Purpose: Full** control across all roles, billing, and company-wide analytics.

**Dashboard**

**KPI T**iles: same as Admin + team-level breakdowns

**Role Management**

**View** & manage Sales Reps, Managers, Auditors, Support

Assign/revoke roles

**Billing Control**

**Plans** & pricing edits

Invoices, refunds, overrides

**Additional Tools:**

**Audit** Logs

Mail

Settings

# PitchProX Onboarding

## 1. Calibration needs to be created

**The C**alibration Module to determine the users calibration score