📊 CRM Automation & Dashboard Project

🚀 Overview

This project demonstrates how to design and implement **CRM automations, dashboards, and nurturing flows** using both conceptual design and simple Python simulations.
 The goal is to show:

- How to streamline sales processes

- Provide role-based dashboards

- Automate lead nurturing

- Use AI (ChatGPT, etc.) responsibly as an assistant

Part 1: CRM Automations

We implemented three key automations:

1. **Auto-Tagging**

   - Tags leads automatically (e.g., "Hot Lead" if score > 50, "Website Lead" if from website).

2. **Lifecycle Stage Updates**

   - Automatically moves contacts through stages → Lead → MQL → SQL → Customer.

3. **Reminders / Follow-ups**

   - Notifies sales reps if no activity for X days.

   - Example: "Follow up with Lead X — last contacted 3 days ago."

⚙️ *Implemented using HubSpot / Zoho workflows, or via Notion + Zapier/Integromat.*

Part 2: Funnel & CAC-LTV Tracking

- Funnel stages: **Lead → MQL → SQL → Customer**

- KPIs: Conversion rates, drop-offs, cost per lead, CAC:LTV ratio.

📈 *We built simple Python visualizations for the funnel using Matplotlib.*

```python
import matplotlib.pyplot as plt

stages = ["Lead", "MQL", "SQL", "Customer"]
counts = [100, 40, 18, 10]

plt.bar(stages, counts)
plt.title("Sales Funnel Conversion")
plt.ylabel("Count")
plt.show()
```

Part 3: Role-Based Dashboards

We designed dashboards for **Sales Reps, Growth Manager, and CEO**.

- 🔹 **Sales Rep Dashboard**

  - My Leads (status, last contacted, next follow-up)

  - Tasks Due Today

  - Pipeline View (Kanban style)

  - Activity Tracker (calls/emails per week)

- 🔹 **Growth Manager Dashboard**

  - Funnel Conversion Rates

- Team Pipeline Performance

- Lead Source Effectiveness

- Leaderboard by Deal Value

- Revenue Forecast

- 🔹 **CEO Dashboard**

  - Total Revenue (MTD/YTD vs Target)

  - Revenue Growth Trend

  - CAC vs LTV (Cohorts)

  - Product/Region Performance

📊 *Python Mockup Example (CEO Revenue Trend)*

```python
months = ["Jan", "Feb", "Mar", "Apr", "May", "Jun"]
revenue = [200000, 250000, 300000, 280000, 350000, 400000]

plt.plot(months, revenue, marker='o')
plt.title("CEO – Revenue Trend")
plt.ylabel("Revenue (₹)")
plt.show()
```

Part 4: Nurturing Messages

We created nurturing messages for **each funnel stage** (via Email & WhatsApp).

Stage	Email Example	WhatsApp Example
Lead	*"Thanks for connecting! Here's a quick overview of how we can help…"*	*"Hi [Name], thanks for checking us out 👋. Want me to send a quick case study?"*

MQL	*"Since you downloaded our guide, here's more insights. Would you like a walkthrough?"*	*"Hi [Name], did you get a chance to review our guide? Happy to explain."*
SQL	*"Let's schedule a quick call to understand your needs. Does [day/time] work?"*	*"Hi [Name], can we set up a demo this week?"*
Customer	*"Welcome aboard 🎉 Here's your onboarding guide and support contacts."*	*"Welcome, [Name]! 🎉 Here's your onboarding link: [link]."*