

Lead Management & Task Tracking System

Phase 1

1. Problem Understanding & Industry Analysis

Sales teams often face challenges in managing leads efficiently due to the lack of centralized systems for tracking, assigning, and following up on potential customers. Manual processes lead to missed opportunities, delayed follow-ups, and poor visibility into team performance.

This project aims to:

- Streamline lead capture and assignment.
- Automate task creation and notifications for follow-ups.
- Provide sales managers with dashboards and reports to monitor performance.
- Ensure role-based access so agents can focus on their leads while managers can oversee the entire pipeline.

2. Requirement Gathering

Requirement gathering involves collecting detailed needs from stakeholders such as sales managers, agents, and customers.

For this project (**Lead & Task Management System**):

- Agents need to create/manage leads.
- Managers need to assign and track tasks.
- Customers need proper follow-ups.
- Admin needs dashboards to see performance.

3. Stakeholder Analysis

Stakeholders and their roles include:

- **Sales Manager** → Oversees pipeline, assigns leads, monitors KPIs.
- **Sales Agents** → Work on leads, update statuses, complete tasks.
- **System Admin** → Manages Salesforce org setup.

- **Customer** → Indirect stakeholder, receives communication.

4. Business Process Mapping

Flow of operations:

1. Lead Captured (from web form / manual entry).
2. Lead Assigned (auto or manual).
3. Task Created (follow-up, meeting, call).
4. Lead Converted → Account, Contact, Opportunity.
5. Closed-Won → Tracked in reports/dashboards.

This process ensures complete lifecycle management of leads.

5. Industry-specific Use Case Analysis

Although designed as a generic CRM solution, this project can adapt to multiple industries:

- **Healthcare** → Leads = patients, tasks = follow-ups.
- **Education** → Leads = students, tasks = counselling sessions.
- **Retail** → Leads = customers, tasks = promotions follow-up.

6. AppExchange Exploration

Relevant Salesforce AppExchange tools for scaling include:

- **Task Ray** → Project management.
- **Conga Composer** → Documents/quotes automation.
- **Einstein Activity Capture** → AI-based email + calendar sync.

For this project, native Salesforce automation is sufficient, but AppExchange solutions may be explored for enterprise needs.