Product Requirements Document (PRD)

1. Overview

Product Name: The Simple Rep

Description: The Simple Rep is a mobile application designed to guide new sales representatives through their first 28 days in a door-to-door (D2D) sales role. The app streamlines the onboarding process, provides structured training, incorporates gamification elements, facilitates tracking of progress and performance, and emphasizes direct recruiting. It includes HR/Admin functionalities to manage referrals, track their status, and gamify the recruiting process with tiers and prizes. The main goal is to push direct recruiting and gamify the new sales rep's journey to enhance engagement, motivation, and success rates.

2. Objectives

- **Simplify Onboarding:** Provide a user-friendly platform that guides new reps through the onboarding process, including paperwork, training, and initial field activities.
- **Structured Training:** Offer a comprehensive training program covering company values, sales techniques, product knowledge, and field strategies.
- **Gamified Recruiting:** Encourage reps to submit potential candidates (referrals) by gamifying the process with tiers and prizes.
- **HR/Admin Management:** Provide an interface for HR/Admin to track and manage referrals, including status updates and outcomes.
- **Fast Start and Ramp Up Programs:** Incentivize quick sales success and consistent performance through tiered programs with specific targets and rewards.
- **Progress and Goal Tracking:** Allow reps and managers to monitor task completion, training progress, activity levels, and key performance indicators (KPIs).
- **Communication:** Facilitate communication between reps, mentors, managers, and HR for support and guidance.

3. User Types

1. **New Sales Representative (Rep)**
   - Primary user going through onboarding, training, and initial field activities.

2. **Sales Manager**
   - Oversees reps, monitors progress, sets goals, and provides coaching.

3. **Mentor**
   - Experienced rep assigned to guide new hires.

4. **Recruiter/HR**
   - Manages the recruitment pipeline, tracks referrals, updates statuses, and communicates with candidates.

5. **Administrator**
   - Manages app settings, content, and user permissions.

4. User Stories

New Sales Representative

- **AS A** new rep, **I WANT** to submit potential candidates (referrals) **SO THAT** I can contribute to team growth and earn rewards.
- **AS A** new rep, **I WANT** to track the status of my referrals **SO THAT** I can see their progress through the hiring process.
- **AS A** new rep, **I WANT** to participate in gamified recruiting with tiers and prizes **SO THAT** I am motivated to refer quality candidates.
- **AS A** new rep, **I WANT** to complete tasks in my first 28 days **SO THAT** I can achieve early success and earn incentives.
- **AS A** new rep, **I WANT** to receive notifications about my referrals and tasks **SO THAT** I stay informed and engaged.

Sales Manager

- **AS A** sales manager, **I WANT** to monitor reps' referral submissions and their outcomes **SO THAT** I can recognize their contributions and support recruiting efforts.
- **AS A** sales manager, **I WANT** to track analytics on referrals submitted and hired per rep **SO THAT** I can identify top performers and areas needing improvement.
- **AS A** sales manager, **I WANT** to support reps in their first 28 days **SO THAT** they are set up for success.

Mentor

- **AS A** mentor, **I WANT** to encourage my mentee to participate in the recruiting process **SO THAT** they contribute to team growth.

Recruiter/HR

- **AS A** recruiter/HR, **I WANT** to receive and manage referrals submitted by reps **SO THAT** I can efficiently process potential candidates.
- **AS A** recruiter/HR, **I WANT** to update the status of referrals **SO THAT** reps are informed about their referrals' progress.
- **AS A** recruiter/HR, **I WANT** to schedule interviews and track outcomes **SO THAT** the hiring process is transparent and organized.

Administrator

- **AS AN** administrator, **I WANT** to configure gamification settings for recruiting tiers and prizes **SO THAT** they align with company policies.
- **AS AN** administrator, **I WANT** to manage HR/Admin functionalities **SO THAT** the app supports efficient recruitment processes.

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5. Functional Requirements

5.1 Onboarding Process

- **Onboarding Checklist:**
  - Detailed tasks for new reps to complete, including submitting referrals.
  - Completion tracking and notifications.
  - Manager and mentor access to view progress.

5.2 Gamified Recruiting

Referral Submission

- **Contact Syncing:**
    - Reps can sync their device contacts with the app.

- **Referral Submission:**
    - Reps can select contacts or manually add potential candidates.

- **Submission Confirmation:**
    - Reps receive confirmation when a referral is submitted.

Referral Tracking

- **Status Updates:**
    - HR/Admin updates the status of referrals (e.g., HR Reaching Out, Interview Scheduled with Date, Hired, Not Hired).

- **Notifications:**
    - Reps receive notifications when the status of their referrals changes.

Gamification Tiers

- **Three Tiers for Referrals Submitted:**

    - Tier 1: Submit X number of referrals - Prize A.
    - Tier 2: Submit Y number of referrals - Prize B.
    - Tier 3: Submit Z number of referrals - Prize C.

- **Three Tiers for Referrals Hired:**

    - Tier 1: X number of referrals hired - Prize D.
    - Tier 2: Y number of referrals hired - Prize E.
    - Tier 3: Z number of referrals hired - Prize F.

- **Prizes:**

    - Prizes attached to each tier to incentivize reps.

- **Leaderboard:**

    - Displays standings based on the number of referrals submitted and hired.

5.3 HR/Admin Management

- **Referral Management Dashboard:**
    - View all submitted referrals with details.

- **Status Updates:**
    - Ability to update the status of each referral.

- **Candidate Communication:**
    - Contact candidates to schedule interviews.

- **Interview Scheduling:**
    - Schedule interviews and record dates.

- **Outcome Tracking:**
    - Record the outcome of interviews (Hired, Not Hired, Pending).

- **Analytics:**
    - Track analytics per rep on referrals submitted, status, and hiring rates.

5.4 First 28 Days Gamification

- **Program Overview:**
  - Gamify the first 28 days with tasks, goals, and rewards.
- **Daily and Weekly Tasks:**
  - Specific tasks to be completed, including recruiting activities.
- **Progress Tracking:**
  - Reps can see their progress through the 28-day program.
- **Rewards:**
  - Incentives for completing tasks and achieving goals.

5.5 Training Modules

- **Structured Training Plan:**
  - Training content aligned with the first 28 days' program.
- **Progress Tracking:**
  - Tracks completion of required training modules.

5.6 Performance and Analytics

- **Activity Logs:**
  - Record of tasks completed, referrals submitted, and sales activities.
- **KPI Dashboards:**
  - Visual representation of key metrics, including recruiting performance.
- **Goal Tracking:**
  - Set and track goals for recruiting and sales activities.
- **Reports:**
  - Generate reports on individual and team performance.

5.7 Communication Tools

- **In-App Messaging:**
  - Communication between reps, mentors, managers, and HR.
- **Notifications:**
  - Alerts for task deadlines, status updates, and rewards.

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6. Non-Functional Requirements

- **Platform Compatibility:**
  - Compatible with iOS and Android devices.
- **User-Friendly Interface:**
  - Intuitive design suitable for users with varying tech skills.
- **Security and Privacy:**
  - Protect user data, especially contact information and personal details.
- **Data Compliance:**
  - Adhere to data protection regulations (e.g., GDPR).

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7. Data Requirements

- **User Data:**
  - Personal information, contact details, role, and permissions.

- **Referral Data:**
  - Details of referrals submitted, status updates, and outcomes.

- **Activity Data:**
  - Logs of tasks completed, points earned, and performance metrics.

- **Program Data:**
  - Progress in the first 28 days' program, rewards earned.

- **Analytics Data:**
  - Metrics for referrals submitted, hired, and per-rep analytics.

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8. Integration Requirements

- **Contact Management:**
  - Integration with device contacts for referral submission.

- **Calendar Integration:**
  - Sync interview schedules with HR calendars.

- **External Training Platforms:**
  - Access to resources like Sam Taggart's training materials.

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9. User Interface (UI) Requirements

9.1 New Sales Representative UI

- **Referral Submission Interface:**
  - Easy-to-use interface to select and submit referrals.

- **Referral Tracking Dashboard:**
  - View the status of submitted referrals.

- **Gamification Elements:**
  - Display tiers, progress towards prizes, and leaderboards.

- **28-Day Program Progress:**
  - Visual indicators of tasks completed and rewards earned.

9.2 HR/Admin UI

- **Referral Management Dashboard:**
  - List of all referrals with filtering and sorting options.

- **Status Update Interface:**
  - Ability to update referral statuses and schedule interviews.

- **Candidate Profile View:**
  - Access to candidate details and contact information.

- **Analytics Dashboard:**
  - View metrics on referrals per rep, hiring rates, and overall performance.

9.3 Sales Manager UI

- **Team Referral Overview:**
  - View referrals submitted by team members and their statuses.

- **Analytics Dashboard:**
    - Metrics on team recruiting performance.
- **Communication Tools:**
    - Ability to send messages and notifications to reps.

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10. Development Considerations

- **Modular Architecture:**
    - Facilitate future feature additions and maintenance.
- **API-First Approach:**
    - Enable integration with other systems and platforms.
- **Scalability:**
    - Support an increasing number of users and data volume.
- **Performance:**
    - Ensure quick load times and responsive interactions.

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11. Success Metrics

- **Referral Submission Rate:**
    - Number of referrals submitted per rep.
- **Referral Conversion Rate:**
    - Percentage of referrals that are hired.
- **Engagement Rate:**
    - Reps actively participating in the recruiting gamification.
- **First 28 Days Completion Rate:**
    - Percentage of reps completing the 28-day program tasks.
- **Retention Rate:**
    - Percentage of reps retained after the initial period.

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12. Additional Features

12.1 Gamified Recruiting Details

- **Tiers for Referrals Submitted:**

    - **Tier 1:** Submit 5 referrals - Prize A.
    - **Tier 2:** Submit 10 referrals - Prize B.
    - **Tier 3:** Submit 15 referrals - Prize C.

- **Tiers for Referrals Hired:**

    - **Tier 1:** 1 referral hired - Prize D.
    - **Tier 2:** 3 referrals hired - Prize E.
    - **Tier 3:** 5 referrals hired - Prize F.

- **Prizes:**

    - Could be cash bonuses, gift cards, company merchandise, or other incentives.

- **Leaderboard:**

    - Rankings based on referrals submitted and hired.

- **Notifications:**

    - Reps receive notifications when they reach a new tier or earn a prize.

12.2 HR/Admin Functionality

- **Candidate Pipeline Management:**
    - Track candidates through stages: Referred, Contacted, Interview Scheduled, Interviewed, Hired, Not Hired.

- **Automated Communications:**
    - Send emails or messages to candidates and reps upon status changes.

- **Interview Scheduling:**
    - Integration with calendar systems to schedule interviews.

- **Reporting:**
    - Generate reports on recruitment metrics.

12.3 Analytics and Reporting

- **Per Rep Analytics:**
    - View individual rep performance in recruiting and task completion.

- **Team Analytics:**
    - Aggregate data for team performance.

- **Custom Reports:**
    - Ability to generate reports for specific time frames or metrics.

12.4 Security and Privacy

- **Data Encryption:**
    - Secure storage and transmission of personal and contact data.

- **Permission Controls:**
    - Restrict access to sensitive information based on user roles.

- **Privacy Policies:**
    - Clear communication of data usage and privacy practices.

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13. Entity Relationship Diagram (ERD) Updates

New Entities and Attributes

1. Referrals (Updated)
- **Attributes:**
    - ReferralID (Primary Key)
    - ReferringUserID (Foreign Key to Users)
    - CandidateName
    - CandidateContactInfo
    - SubmissionDate
    - Status (Referred, HR Reaching Out, Interview Scheduled, Hired, Not Hired)
    - StatusUpdateDate

- Notes

- **Relationships:**
    - Many-to-One with **Users** (Referring Rep)
    - One-to-One with **Candidates**

2. Candidates
- **Attributes:**
    - CandidateID (Primary Key)
    - Name
    - ContactInfo
    - Resume (Optional)
    - ReferralID (Foreign Key)
    - Status (Same as Referral Status)

- **Relationships:**
    - One-to-One with **Referrals**

3. HRActivities
- **Attributes:**
    - ActivityID (Primary Key)
    - ReferralID (Foreign Key)
    - HRUserID (Foreign Key to Users)
    - ActivityType (Call, Email, Interview Scheduled, Status Update)
    - Date
    - Notes

- **Relationships:**
    - Many-to-One with **Referrals**
    - Many-to-One with **Users** (HR/Admin)

4. Gamification (Updated)
- **Attributes:**
    - GamificationID (Primary Key)
    - UserID (Foreign Key)
    - TotalPoints
    - ReferralsSubmitted
    - ReferralsHired
    - RecruitingTier
    - PrizesEarned

- **Relationships:**
    - Many-to-One with **Users**

Conclusion

The Simple Rep app is designed to push direct recruiting and gamify the first 28 days of a new sales rep's journey. By integrating HR/Admin functionalities for managing referrals, tracking their status, and providing analytics per rep, the app aims to enhance engagement in the recruiting process. Gamifying the submission and hiring of referrals with tiers and prizes incentivizes reps to actively participate in recruitment.

The app provides a comprehensive platform for new reps to onboard, receive training, complete tasks, and contribute to team growth through direct recruiting. By focusing on these areas, the app seeks to improve retention rates, accelerate new reps' success, and expand the sales team effectively.