
Lead Assignment - SLA Analysis

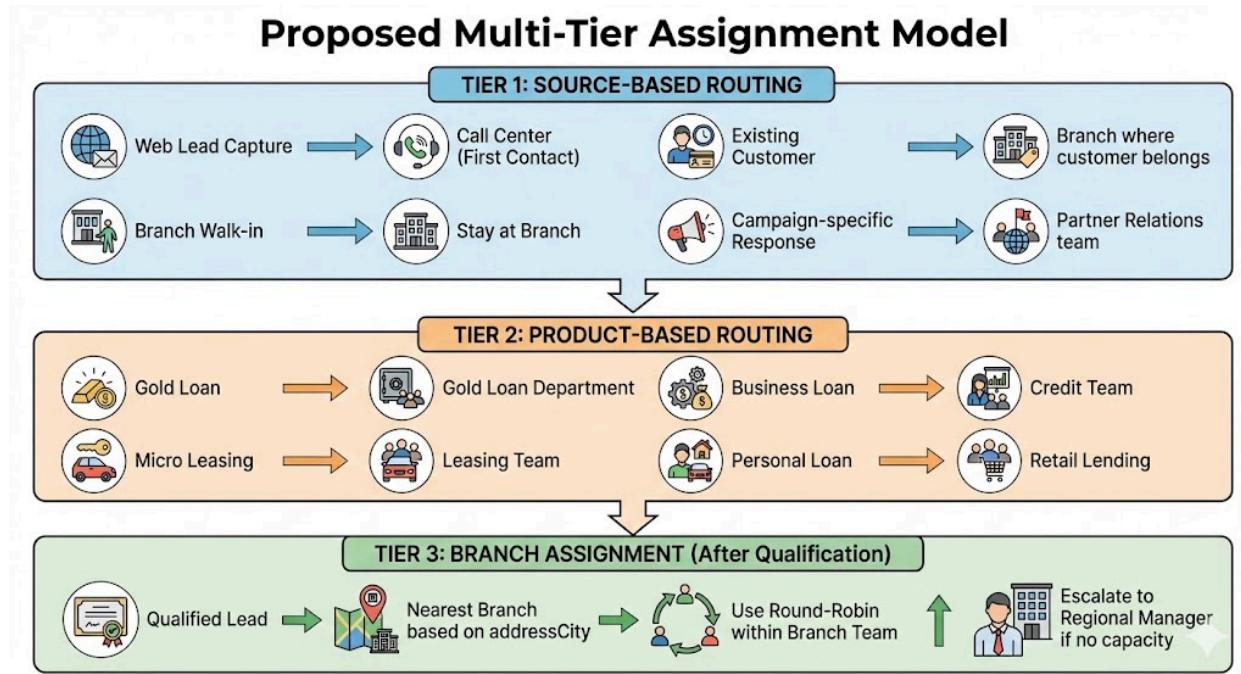
CURRENT STATE ANALYSIS

1. Lead Assignment Architecture (Current)

Component	Current State	Gap
Assignment Workflow	Round-Robin to "Call Center Operations" team	Hardcoded to single team, no branch routing
Branch Link (cBranch)	Field exists on Lead but not populated	User has cBranch, Lead doesn't inherit
Team Structure	13 teams (mostly branch names) but users not assigned	Only 1 user (Agent 001) has team assignment
User-Branch Link	Users have cBranchId populated	Not leveraged for assignment
Lead Status Flow	New → Contacted → Validated → Qualified → Converted/Deferred	No time-bound SLA triggers

Problem: Assignment is simplistic - all leads go to Call Center via round-robin regardless of source, product type, or geography.

Proposed Multi-Tier Assignment Model:



Required Fields to Add to Lead:

Field	Type	Purpose
cInitialAssignedAt	datetime	When first assigned
cFirstContactAt	datetime	When first call/contact made
cQualifiedAt	datetime	When moved to Qualified
cHandoffAt	datetime	When handed to branch

LEAD SLA FRAMEWORK (Adapting Case Model)

Proposed Lead SLA Fields (Mirror Case Pattern):

Field	Type	Options	Formula Logic
cLeadTargetDate	datetime	-	Calculated from status + priority
cLeadRemainingTime	varchar	-	HH:MM:SS countdown
cLeadSLAStatus	enum	OnTrack / AtRisk / Breached	Based on remaining time
cLeadPriority	enum	Hot / Warm / Cold	Based on lead score + source

Lead SLA Matrix (Suggested):

Stage	Hot Lead	Warm Lead	Cold Lead
New → First Contact	2 hours	4 hours	24 hours
Contacted → Validated	24 hours	48 hours	3 days
Validated → Qualified	48 hours	3 days	5 days
Qualified → Handoff to Branch	4 hours	4 hours	4 hours
Total Max Pipeline Time	~3 days	~5 days	~9 days

Auto-Priority Logic:

```
IF cLeadScore >= 80 AND source IN ('Existing Customer', 'Partner') THEN 'Hot'
ELSE IF cLeadScore >= 60 AND cDesiredLoanAmount > 5000000 THEN 'Warm'
ELSE 'Cold'
```

LEAD SLA WORKFLOWS (To Create)

Workflow 1: Set Lead SLA Target (afterRecordSaved)

Trigger: status changed OR cLeadPriority changed
Conditions: status IN (New, Contacted, Validated, Qualified)

Action: Calculate cLeadTargetDate based on SLA matrix

Workflow 2: Lead SLA Countdown (Scheduled - every 5 mins)

Target Report: Open Leads (status NOT IN Converted, Disqualified, Deferred)

Action: Calculate remaining time, update cLeadSLAStatus

If AtRisk → Notify assignedUser

If Breached → Escalate + Notify supervisor

Workflow 3: Auto-Escalation on Breach

Trigger: cLeadSLAStatus changed to 'Breached'

Actions:

1. Reassign to supervisor (manager of current assignedUser)
 2. Create Task: "SLA Breached - Urgent Follow-up Required"
 3. Send notification
 4. Log to stream: "Lead escalated due to SLA breach"
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UI PRESENTATION FOR LEAD SLA

Color Coding (Dynamic Logic on field styling):

Status	Color	Threshold
On Track	Green (#28a745)	> 2 hours remaining
At Risk	Amber (#ffc107)	1-2 hours remaining
Breached	Red (#dc3545)	Time expired

List View Column: Add `cLeadSLAStatus` and `cLeadRemainingTime` to Lead list layout with conditional colors.

Kanban Enhancement: Show SLA status badge on each card using dynamic logic (Nice to Have).
