

LeadFlow — Complete 60-Day CRM Development Roadmap

Team Roles: Developer (Person A) + Growth/Testing (Person B)

Week 1 — Foundation Setup (Days 1–7)

| Day 1 | Developer (Person A) | Growth / QA (Person B) |
|-------|--|---|
| Tasks | Setup repo, folder structure, Node/Express backend, .env file. | Study CRM basics, document system overview. |
| Day 2 | Developer (Person A) | Growth / QA (Person B) |
| Tasks | Configure PostgreSQL/Supabase DB, migrations. | Document schema structure. |
| Day 3 | Developer (Person A) | Growth / QA (Person B) |
| Tasks | Create tables (users, clients, leads). | Create dummy data for testing. |
| Day 4 | Developer (Person A) | Growth / QA (Person B) |
| Tasks | Implement auth routes. | Prepare login UI sketch. |
| Day 5 | Developer (Person A) | Growth / QA (Person B) |
| Tasks | Admin + Client login separation logic. | Study admin-client permissions. |
| Day 6 | Developer (Person A) | Growth / QA (Person B) |
| Tasks | widget.js injection test on simple HTML. | Test widget on demo pages. |
| Day 7 | Developer (Person A) | Growth / QA (Person B) |
| Tasks | Cleanup and bug fixes. | Documentation update. |

Week 2 — Lead Capture System (Days 8–14)

| Day 8 | Developer (Person A) | Growth / QA (Person B) |
|-------|------------------------|------------------------|
| Tasks | POST /api/leads route. | Test via Postman. |

| Day 9 | Developer (Person A) | Growth / QA (Person B) |
|-------|-----------------------|------------------------|
| Tasks | Basic test HTML form. | Verify DB inserts. |

| Day 10 | Developer (Person A) | Growth / QA (Person B) |
|--------|---------------------------|------------------------|
| Tasks | widget.js form rendering. | UI test. |

| Day 11 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------|------------------------|
| Tasks | Connect widget to DB. | Load testing. |

| Day 12 | Developer (Person A) | Growth / QA (Person B) |
|--------|--------------------------|-------------------------|
| Tasks | Add client_id isolation. | Verify lead separation. |

| Day 13 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------------|------------------------|
| Tasks | Spam protection (honeypot). | Try bypass tests. |

| Day 14 | Developer (Person A) | Growth / QA (Person B) |
|--------|------------------------|------------------------|
| Tasks | Testing and bug fixes. | Report issues. |

Week 3 — CRM Dashboard (Days 15–21)

| Day 15 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | React CRM layout. | UI suggestions. |

| Day 16 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Leads list page. | Test pagination. |

| Day 17 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Lead detail page. | Add notes and test. |

| Day 18 | Developer (Person A) | Growth / QA (Person B) |
|--------|-------------------------|------------------------|
| Tasks | Status update workflow. | Test workflow. |

| Day 19 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Filters and search. | Edge-case testing. |

| Day 20 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|--------------------------|
| Tasks | CSV export feature. | Test export of 200 rows. |

| Day 21 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | UI polishing. | Internal testing. |

Week 4 — Notifications + Admin Panel (Days 22–30)

| Day 22 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------|------------------------|
| Tasks | SendGrid integration. | Verify emails. |

| Day 23 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Auto-reply mails. | Stress test. |

| Day 24 | Developer (Person A) | Growth / QA (Person B) |
|--------|-------------------------|------------------------|
| Tasks | Twilio WhatsApp alerts. | Delivery testing. |

| Day 25 | Developer (Person A) | Growth / QA (Person B) |
|--------|---------------------------------------|------------------------|
| Tasks | Follow-up automation (24h, 48h, 72h). | Reminder testing. |

| Day 26 | Developer (Person A) | Growth / QA (Person B) |
|--------|--------------------------|------------------------|
| Tasks | Admin Panel client list. | Role testing. |

| Day 27 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Logs system. | Error log tests. |

| Day 28 | Developer (Person A) | Growth / QA (Person B) |
|--------|------------------------------------|------------------------|
| Tasks | Admin actions (reset, deactivate). | Documentation. |

| Day 29 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Fix bugs. | Test everything. |

| Day 30 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------|------------------------|
| Tasks | MVP internal release. | MVP QA. |

Week 5 — Stripe Billing (Days 31–37)

| Day 31 | Developer (Person A) | Growth / QA (Person B) |
|--------|------------------------------------|------------------------|
| Tasks | Stripe setup (products + pricing). | Document billing flow. |

| Day 32 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Pricing page. | UI review. |

| Day 33 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------|------------------------|
| Tasks | Checkout session API. | Test sessions. |

| Day 34 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Webhook listener. | Verify events. |

| Day 35 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------------|------------------------|
| Tasks | Subscription gating logic. | Test dashboard lock. |

| Day 36 | Developer (Person A) | Growth / QA (Person B) |
|--------|--------------------------|------------------------|
| Tasks | Failed payment handling. | Simulate failures. |

| Day 37 | Developer (Person A) | Growth / QA (Person B) |
|--------|-------------------------|------------------------|
| Tasks | Billing integration QA. | Full-cycle test. |

Week 6 — CRM Advanced Features (Days 38–44)

| Day 38 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Analytics page. | Data validation. |

| Day 39 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Source tracking. | URL tests. |

| Day 40 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Lead tags. | Workflow testing. |

| Day 41 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Calendar reminders. | Calendar sync testing. |

| Day 42 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Team-member access. | Role simulation. |

| Day 43 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Logo upload. | File tests. |

| Day 44 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Fix bugs. | Regression testing. |

Week 7 — Widget Advanced (Days 45–51)

| Day 45 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Widget themes. | Cross-browser tests. |

| Day 46 | Developer (Person A) | Growth / QA (Person B) |
|--------|------------------------|------------------------|
| Tasks | Custom fields support. | Field tests. |

| Day 47 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Redirect feature. | Redirect validation. |

| Day 48 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Animations. | UX review. |

| Day 49 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Validation rules. | Input testing. |

| Day 50 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------------------|------------------------|
| Tasks | Widget performance optimizations. | Speed tests. |

| Day 51 | Developer (Person A) | Growth / QA (Person B) |
|--------|-------------------------------|---------------------------|
| Tasks | Cross-platform compatibility. | WordPress/Wix/HTML tests. |

Week 8 — Final Polish & Security (Days 52–60)

| Day 52 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Full audit. | QA full system. |

| Day 53 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Security hardening. | Attack simulation. |

| Day 54 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Backup system. | Backup restore test. |

| Day 55 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Installation docs. | Client-ready docs. |

| Day 56 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Onboarding flow. | Flow testing. |

| Day 57 | Developer (Person A) | Growth / QA (Person B) |
|--------|-----------------------|------------------------|
| Tasks | Multi-client testing. | Simulate 5 tenants. |

| Day 58 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Stripe deep testing. | Edge cases. |

| Day 59 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Load testing. | 100–500 leads. |

| Day 60 | Developer (Person A) | Growth / QA (Person B) |
|--------|----------------------|------------------------|
| Tasks | Final release build. | Final QA. |