

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.