

LEAD LYNX

31-01-2025

OVERVIEW

This project is more of a business application than a typical website, so the focus is on functionality. The goal is to help both the sales team and business managers track and manage leads efficiently. By keeping records of lead status—whether interested, not interested, or contacted—the platform helps improve collaboration, decision-making, and business growth.

What the Sales Team Wants ?

- A lead listing page where they can view all leads.
- Ability to sort and filter leads based on their needs (e.g., new leads, high-priority leads).
- A way to manage leads efficiently by updating their status (interested, not interested, contacted).
- Call integration to reach out to leads directly and analyze their needs.
- A quick-view panel to access key lead details before contacting.
- Automated reminders and follow-ups for pending leads.

What the Business Team Wants ?

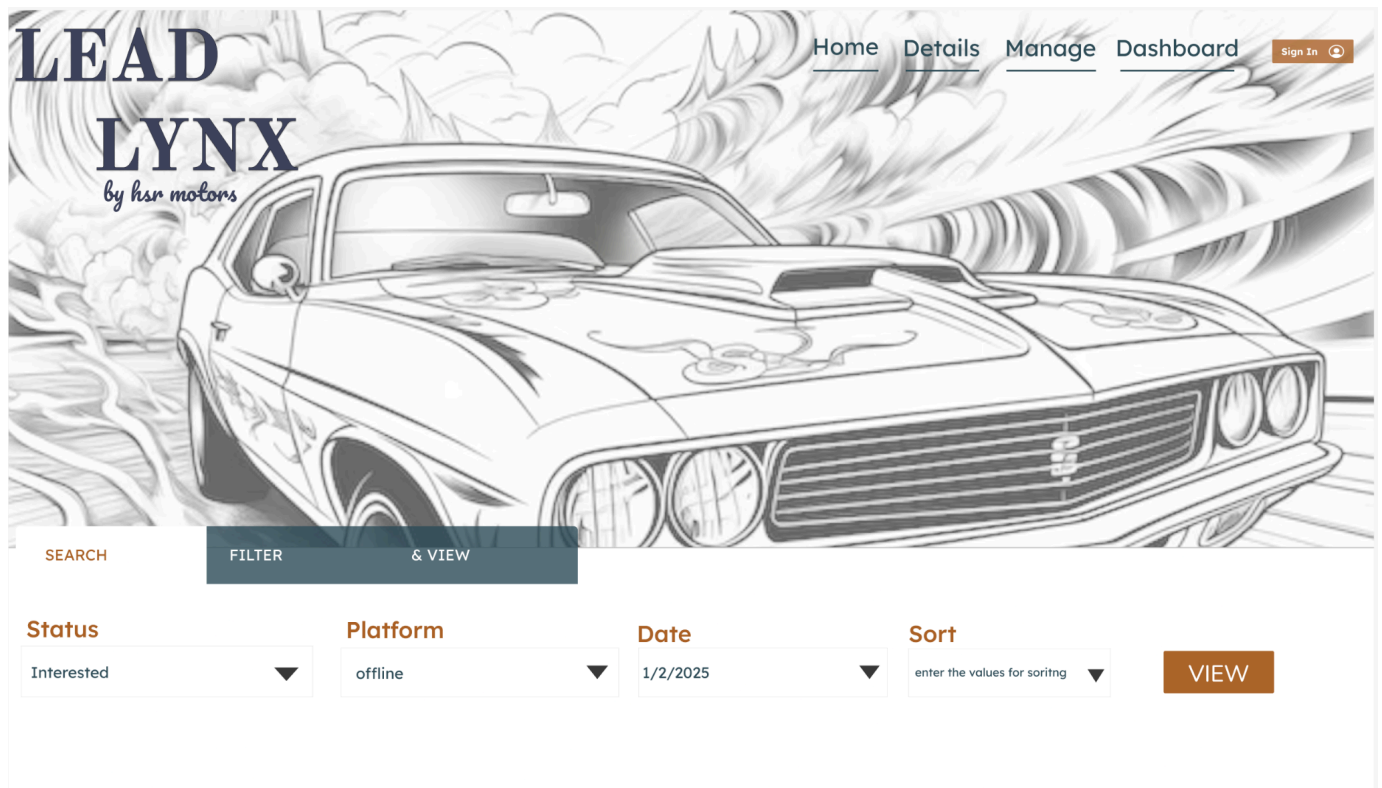
- A dashboard to analyze overall sales performance.
- Insights on where most leads are coming from (offline, online, Google Ads, Facebook Ads, etc.).
- Recent conversions and lost leads tracking.
- Monthly sales trends with charts and graphs.
- A pie chart showing the distribution of lead sources.
- Data-driven tips on where to focus for better sales.
- Performance tracking of sales agents to identify top performers.

The sales team streamlines conversions, while the business team uses data insights to optimize decisions and drive growth.

FEATURES

1. A salesperson can filter leads by status, platform, and date, and sort them as needed.
2. Leads can be viewed in detail, and their status can be updated quickly.
3. Bulk lead management allows mailing based on queue, location, and activity.
4. Salespersons can upload files like CSV for efficient data handling.
5. Clicking on a lead profile enables direct calls, inquiries, and automated follow-ups.
6. Cases related to leads can be registered for better tracking.
7. Lead history, including past purchases and services, is accessible.
8. A business dashboard provides insights into sales performance and trends.

WIREFRAME / MOCKUP / PROTOTYPE



The salesperson can set the status, platform, date, and sort features, and view the details on this page.

The dashboard shows two cars:

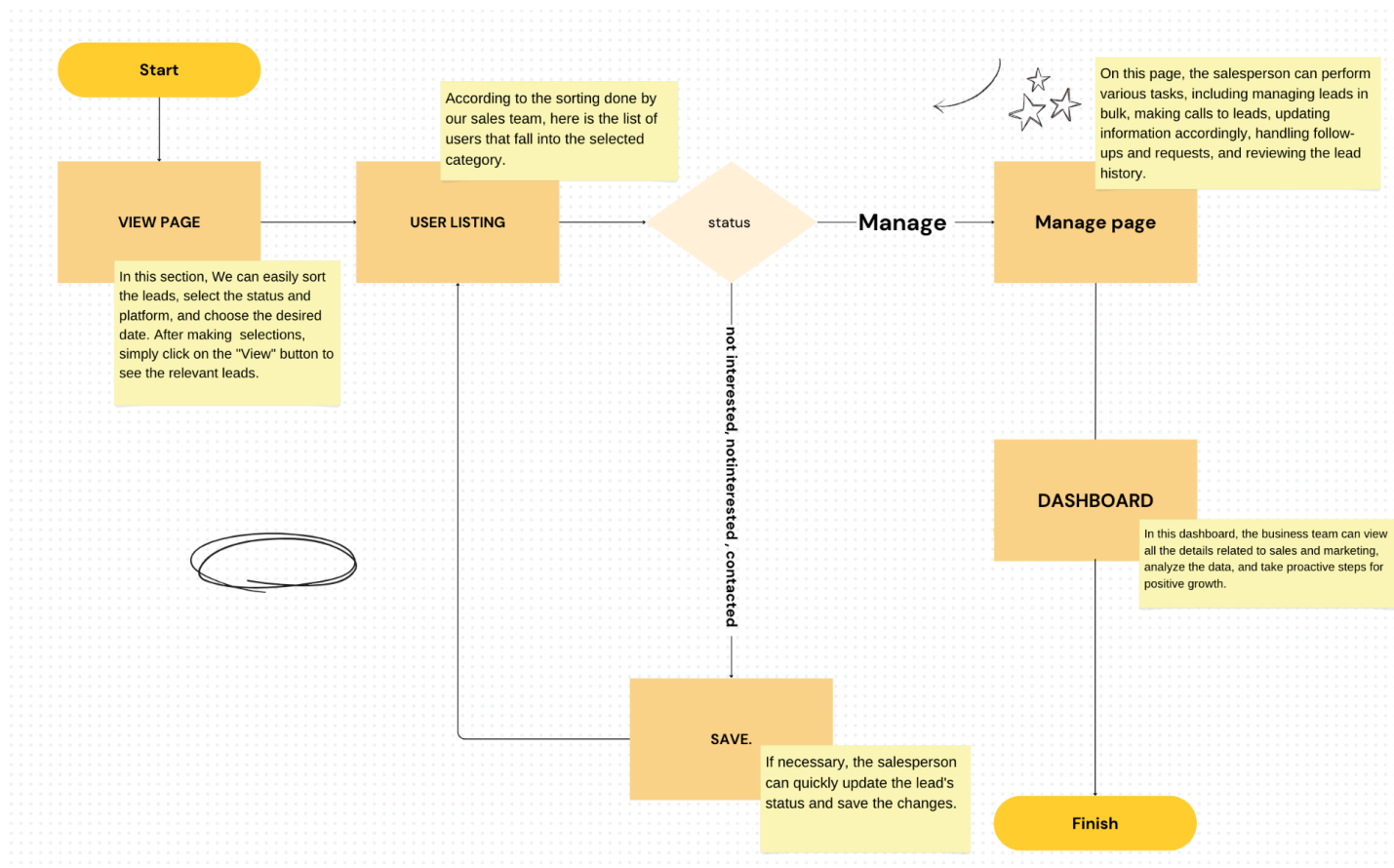
- One car starts at the base, representing the sales percentage change.
- The other car starts at level 10, indicating the sales performance from the previous year/month.

As sales rise, the car moves up the slope, and as sales decline, it moves down, visually reflecting the performance.

USER FLOW

LINK FOR THE USER FLOW :

https://www.canva.com/design/DAGdtTCythY/M2JXDCbhFagAxAPjmbSAsw/edit?utm_content=DAGdtTCythY&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton



OTHER LINKS

Figma/XD/Portfolio links here:

<https://www.figma.com/design/Uq4IrYFCvlinjbK8zMgpWt/Lead-Lynx?node-id=0-1&t=sYPIG29WCJQ9qkGC-1>

Thnks.