Scenario brief: Mobile CRM dashboard design

# Step 1: Getting started with wireframing

As mentioned already, is developing a new Customer Relationship Management (CRM) system, and a key component is the mobile companion app designed to support our enterprise sales representatives when they're away from their desks.

### Your Role & goal

Your current task is to lead the initial design for a crucial feature within this mobile app: **the main dashboard**. This dashboard should serve as the go-to screen for sales reps when they open the app, providing them with a quick, informative overview of their most critical information. Your goal is to create low-fidelity wireframes and a high-fidelity mockup for this dashboard.

### Understanding the target user: Enterprise sales representatives

The primary users of this mobile app are FlowState ERP/CRM's enterprise client sales representatives. Consider their typical workday and needs:

* **Highly mobile**: They are often travelling, meeting clients, or working between locations, relying heavily on their mobile devices.
* **Time-sensitive:** They need quick access to information to prepare for meetings, follow up on leads, and track progress without lengthy navigation.
* **Goal-oriented:** Their focus is on managing client relationships, progressing deals through the sales pipeline, and meeting sales targets (KPIs).
* **Information needs:** While the full desktop CRM holds extensive data, the mobile app (and especially its dashboard) needs to surface the most critical, actionable information for on-the-go use.

### Context: Mobile companion app dashboard

It's important to remember this is a **companion app**, designed to complement the main desktop CRM/ERP platform, not replace it entirely. Therefore, the mobile dashboard's primary purpose is to provide **at-a-glance visibility** into essential, up-to-date information. It should help sales reps quickly understand:

* Where do I stand regarding my sales targets?
* What's the current health of my sales pipeline?
* Are there any urgent items needing my attention?

### Key information & design considerations for the dashboard

As you begin designing (starting with wireframes in Step 1), ensure the dashboard layout effectively presents:

* **Key Performance Indicators (KPIs):** Focus on 2-3 vital metrics (e.g., progress towards monthly/quarterly quota, value of deals closing soon, number of overdue tasks).
* **Sales pipeline summary:** A concise overview of the sales pipeline (e.g., number of deals or total value per stage). How can this be visualized effectively on a small screen?
* **Clear navigation:** Users must be able to easily navigate from this dashboard to other key sections of the mobile app (like detailed contacts, full pipeline view, task list).

### Keep these principles in mind

* **Mobile-first:** Optimize layout, text size, and touch targets for mobile interaction.
* **Efficiency & clarity:** Prioritize scannability and quick comprehension.
* **Data prioritization:** Focus only on the most essential data for a mobile context.
* **Consistency:** Aim for a design that aligns with Microsoft Design Principles and will eventually feel cohesive with the broader FlowState ERP/CRM product suite.

### Your next step

Use the context provided in this brief to inform your design decisions as you begin creating the low-fidelity wireframes for the mobile CRM dashboard in Step 1 of the activity.