Lighthouse CRM PRD

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Overview

This document defines the requirements for a comprehensive, General Purpose Customer Relationship Management (CRM) platform providing a single, unified view of the customer across **Marketing, Sales, and Customer Service.** The system prioritises automation and user productivity via a **Natural Language Bot.** Our goal is to eliminate data silos, drive efficiency, and establish a long-term SaaS revenue stream by targeting the Small to Midsize Business (SMB) market.

The entire system relies on a **Unified Data Foundation (Accounts & Contacts)** and secure Google Authentication.

1. Marketing Automation (Prospect Generation)

- **Purpose:** Attract, segment, and nurture prospects into qualified leads.
- **Key Features:** Campaign management, email automation (drip sequences), and dynamic Lead Scoring to automatically identify Sales-Ready Leads (MQLs).

2. Sales Management (Conversion)

- **Purpose:** Manage the entire sales pipeline from lead qualification to closed revenue.
- **Key Features:** Kanban-style **Pipeline View** for deal progression, detailed activity logging, and using the NL Bot for rapid lead entry and task execution.

3. Customer Service (Retention)

- **Purpose:** Provide post-sale support and self-service options.
- **Key Features:** Centralized **Ticketing System** for agents, automatic **Omnichannel Logging** of communications, and an external **Self-Service Portal** with a Knowledge Base for customers.

Analytics & Reporting: Role-specific **Dashboards** provide real-time KPI visibility (e.g., ROI, pipeline value, resolution time) across all three pillars.

Administration: Granular **Roles & Permissions** and system-wide customization (e.g., sales stages) are managed by the administrator.

System Innovation: The **Natural Language Bot** allows users to execute common tasks and queries using conversational commands, drastically improving productivity.

Goals

Our goal is to deliver a Minimum Viable Product **(MVP)** that addresses the functional outcomes of the General Purpose CRM. The MVP will include foundational cross-functional capabilities (Unified Data, Authentication, Administration) and the core functions of the three pillars (Marketing, Sales, Service) as outlined in the Overview, alongside the other foundational capabilities for automation.

Scope

Phase 1: Core CRM Implementation

In Scope

1. Multitenant Architecture
2. Role and permission based access to data depending on business requirements
3. Web App and Mobile App for business use.
4. Web portal for customer support.

Out of Scope

1. Ai features such as call summarization conversational bots and MCP server.
2. Full ERP and HR section in the CRM

Phase 2: Advanced Ai Integration

In Scope

1. Ai features (i.e. call summarization) and MCP server implementation as well as conversational NL Bot.

Out of Scope

1. On premises deployment
2. Advanced predictive analytics with Ai.

User Journeys

This section shows how a user (an employee at an SMB) interacts with our unified CRM platform, moving a potential customer through the entire lifecycle from prospect to loyal advocate. This unified experience is the core value we deliver to eliminate data silos.

Action: All users (Marketing, Sales, Service) log in and access a **Unified Data Foundation** of Accounts and Contacts, ensuring everyone works off the same, current customer record.

Benefit: Data fragmentation is eliminated. A Sales Rep can immediately see the last support ticket, and a Service Agent can see the original deal size and product purchased.

The Marketing Journey (Attraction & Qualification)

The Marketing Manager's goal is to turn anonymous contacts into Sales-Ready Leads.

1. **Prospect Capture:** The **Marketing Automation** module captures a new web lead (a Prospect) and automatically enrolls them in a nurturing email drip sequence.
2. **Engagement Tracking:** The system monitors the Prospect's behavior (e.g., opened three pricing emails). This data contributes to their dynamic score.
3. **Lead Scoring:** The dynamic **Lead Scoring** mechanism tracks engagement. Once the score hits the defined threshold (e.g., 85 points), the Prospect is automatically flagged as a **Marketing Qualified Lead (MQL)**.
4. **Sales Handoff:** The MQL is instantly pushed into the Sales team's queue and is visible on the Sales Rep's dashboard, ensuring zero delay in follow-up.

The Sales Journey (Conversion & Deal Closure)

The Sales Rep's goal is to manage the pipeline efficiently and close deals faster.

1. **Qualification & Pipeline:** A Sales Rep accepts the MQL, converts it into a new Opportunity/Deal, and places it in the 'Discovery' stage within the **Kanban-style Pipeline View.**
2. **Productivity Boost (NL Bot):** After a successful meeting, the Sales Rep uses the Natural Language Bot for rapid data entry, saving time: ***"Log a call with 'New Deal Opportunity' for 30 minutes, outcome: Presentation Scheduled."***
3. **Activity Logging:** The system automatically creates a log of the activity and schedules the next task, linking it directly to the Opportunity and Contact records.
4. **Deal Closure:** The Sales Rep moves the deal to the 'Closed Won' stage. The system automatically updates the Contact status to "Active Customer" and triggers an internal welcome notification for the Service team.

The Customer Service Journey (Retention & Support)

The Service Agent's goal is to provide fast, complete, and personalized resolutions.

1. **Ticket Creation (Omnichannel):** An Active Customer sends a post-sale inquiry via email. The **Centralized Ticketing System** automatically creates a new Case, logging the communication via **Omnichannel Logging.**
2. **Contextual Resolution:** The Service Agent views the new Ticket. Critically, because the data is unified, the agent sees the customer's Marketing history, their purchase date, and the product purchased *all on the ticket screen*.
3. **Self-Service Option:** Meanwhile, another customer may bypass the agent entirely by resolving their issue using the searchable **Self-Service Portal** (Knowledge Base).

4. **Data Loop Completion:** Upon closing the ticket, the **Analytics & Reporting** dashboard immediately updates the average resolution time, and the customer's account history is updated, making them a target for future relevant Marketing campaigns (e.g., a retention sequence).

Cross-Functional Productivity (The NL Bot)

The **Natural Language Bot** is used continuously by all roles to maximize efficiency across the platform:

1. **Sales Productivity:** Users can accelerate data entry and task creation. Example: A Sales Rep uses the command, ***"Schedule a task to follow up with John Doe next Tuesday at 10 AM,"*** which instantly saves time on manual navigation and form filling.
2. **Marketing Insights:** Users can gain instant access to critical core metrics. Example: A Marketing Manager asks, ***"How many MQLs came from the 'Q3 Website' campaign?"*** receiving the information without needing to open the reports module.
3. **Service Efficiency:** Users can rapidly search and retrieve context. Example: A Service Agent commands, ***"Find all open tickets for ACME Corp,"*** enabling rapid context switching and search functionality across the unified database.

Requirements

This section outlines the specific requirements for the Minimum Viable Product (MVP), organised around the core functional pillars (Leads, Deals, Support, and Analytics) and critical non-functional properties (Usability and Security).

1. **Functional Requirements**

   Phase 1: Core CRM Implementation

   a. Leads Management

Requirement	Expanded Details
Leads Window View	*The tabular view must be customizable, allowing users to select which data columns are displayed. It must support inline editing for quick updates to fields like status or assignment.*
Lead Addition	*Manual addition must include mandatory fields (e.g., Name, Email, Source). Natural language bot integration must support parsing commands like "Add a new lead: John Doe, CEO of Acme Corp, interested in Service X."*

Categorization (Tags)	*Users can create, edit, and delete custom, color-coded tags (e.g., "High-Value," "Cold," "Referral"). A lead can have multiple tags.*
Filter and Sort	*Filtering must be available by all standard fields (e.g., Source, Creation Date, Assigned User) and custom tags. Sorting options must include name, date, and lead score.*
Move to Deal	*The action to move a lead must automatically convert the lead into a new Account (Organization) and Contact, simultaneously creating a new Deal record. The original lead record should be marked as "Converted."*

b. Deals Management

Requirement	**Expanded Details**
Categorization by Stages	*Users must have an interface to configure, name, and order the sales stages (e.g., "Qualification," "Proposal Sent," "Negotiation"). Deals can be marked as completed or cancelled.*
View Options	*The list view must display key metrics. The view should be a Kanban-style pipeline where stages are columns and deals are draggable cards. The deal card must show critical information (e.g., Deal Name, Amount, Organization, Last Activity Date). Drag-and-drop functionality must be enabled for moving deals between stages in the Kanban view.*
Filter and Sort	*Filtering must support multi-criteria selection (e.g., show all deals over $5,000 assigned to 'Jane' in 'Proposal' stage). Sorting by monetary amount, organization name, and tags must be implemented.*

c. Customer Support

Requirement	**Expanded Details**
Ticket Logging and Tracking	*Tickets must be logged with mandatory fields: Subject, Priority, Status, and Associated Contact/Account. Tracking includes a complete history of status changes, notes, and all related communications.*

Calls and Emails	*The system must integrate with communication platforms (VoIP, Email Server) to automatically log and associate incoming/outgoing calls and emails with the correct contact and ticket. Call recordings and email threads must be stored and linked to the ticket record.*
Customer Self-Service Portal	*A portal must allow customers to submit new tickets, view the status of their existing tickets, and access a public knowledge base containing guides and FAQ's.*

d. Analytics

Requirement	Expanded Details
Dashboard View	*The dashboard must be fully configurable per user role, displaying widgets for: Sales Pipeline Value, Current Revenue vs. Goal, Lead-to-Deal Conversion Rate, Average Deal Size, and Support Ticket Backlog. Widgets must offer a "drill-down" feature for deeper data inspection.*
Reports	*Reports must be generatable for key areas such as Sales Team Performance (e.g., activities logged per rep) and Customer Satisfaction (e.g., average ticket resolution time). Reports should be schedulable for automated delivery.*
Forecasts	*Sales forecasting must utilize stage probabilities to provide a weighted sales forecast. The system should also provide historical data comparison and trend analysis.*
Data Export	*All report and dashboard data must be exportable to standard formats (CSV, XLSX) for external analysis.*

e. Administration

Requirement	Expanded Details
Roles and Permissions	*The system must support the creation of custom roles (e.g., "Sales Rep," "Sales Manager," "Support Agent," "Administrator"). Permissions must be defined for each role.*
Permission Scope	*Permissions must be applicable to specific data types and actions, including: Viewing/Editing/Deleting Call Records, Accessing Sensitive Sales Reports (e.g., profitability), and Modifying User Access/Roles.*

Phase 2: Advanced AI Integration

Requirement	Expanded Details
NL Bot Integration	*There will be a Natural Language Bot for the management of core functionality of the CRM through a conversational chatbox UI with proper route calls.*
MCP Creation	*There must be a Model Context Protocol (MCP) for the NL Bot to securely interact with the CRM.*

2. Non-functional Requirements

a. User-Friendlines

Requirement	Expanded Details
Intuitiveness	*The UI must maintain 100% consistency in navigation, button placement, and terminology across all modules (Leads, Deals, Support).*
Error Prevention	*The system must prevent data entry errors by providing instant, relevant field validation messages and requiring confirmation for destructive actions (e.g., deleting a Deal).*

b. Security

Requirement	Expanded Details
Authentication	*User login is handled by **Google Auth** and no passwords or personal data is stored.*
Roles and Permissions	*To ensure security within an organization, roles and permissions decided by the administrator determine what Leads, Deals, and Reports a user can view.*

Core Integrations

1. **Google Workspace:** Gmail, Meet, Calendar.
2. **VoIP:** Voice-over-IP for making calls and recording calls.
3. **Telegram:** Bi-directional messaging
4. **LinkedIn:** Profile activity.
5. **Issue Tracking:** Jira, Linear
6. **Webforms:** For Lead import.

Success Metrics

We designed these metrics to prove two main things: that our **unified data model works**, and that our **Natural Language Bot innovation actually makes life easier**. If we hit these targets, we nail the project and prove we have a viable product!

1. Productivity & Feature Adoption (The "Does the Bot Actually Help?" Test)

These metrics focus on showing off our innovative NL Bot and proving that the system is fast and easy to use.

- **First Action Time (TTFA):** We must measure how fast a user can figure out the app and execute a critical task (like adding a Lead via the Bot or moving a Deal).
    - **Target:** Users must execute a core task (e.g., add a Lead via NL Bot or move a Deal) within < **90 seconds** of initial login.
- **NL Bot Adoption Rate:** This tracks the percentage of our active users (classmates/demo users) who actually use the fancy **Natural Language Bot** instead of the old-school forms.
    - **Target:** > **75%** of weekly active users successfully use the NL Bot for task execution (e.g., logging an activity).
- **Bot vs. Manual Speed Test:** We will measure the time saved by using the NL Bot for core data entry compared to using the traditional form fields.
    - **Target:** Achieve a **30% reduction** in time required to log a Lead or update a Deal compared to standard form entry.
- **Workflow Fail Rate:** This tracks the frequency of users starting a crucial multi-step process (like converting a Lead) and getting frustrated or confused before finishing it.
    - **Target:** Maintain < **5%** abandonment rate for the Lead-to-Deal conversion workflow.
- **Frustration Tracker:** We will track users who repeatedly start and bail on features—a giant red flag for bad UX that we need to fix ASAP.
    - **Target:** Flag users with > **3 abandoned tasks** in a week for targeted UX review.

2. Strategic & Business Metrics (The "Did We Actually Smash the Silos?" Test)

These metrics assess whether the **Unified Data Foundation** is working and if we've built something that pilot customers would actually want to keep using.

- **Data Unification Rate:** This is the big one! It measures if converted Deals have data logged by both Sales ***and*** Service/Marketing, proving the silos are truly gone.
    - **Target:** > **90%** of Deals must contain multi-departmental data to confirm silo elimination.
- **Service Response Time (TTR):** This measures how quickly our Customer Support pillar lets agents resolve issues, proving the ticket system is efficient.
    - **Target:** Achieve an Average TTR of < **4 hours** for high-priority tickets within the first month.
- **Customer Stickiness Rate:** This is the percentage of our pilot SMBs (who we promised a better life) that decide to stick with our CRM after the project demo is over.
    - **Target:** > **85%** retention of pilot organizations.