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DriveCRM – Smart Lead Management System

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OVERVIEW

HSR Motors currently manages its customer leads using spreadsheet software. While functional, this approach limits real-time collaboration, creates visibility gaps in lead ownership, and makes performance tracking difficult. As lead volume grows across platforms like Facebook, Google, website inquiries, and offline campaigns, the manual process becomes inefficient and error-prone.

To address these challenges, I designed **DriveCRM**, a centralized desktop-based lead management web application prototype built in Figma. The system is designed specifically for two key user groups — the Sales Team and the Business Manager — enabling seamless lead tracking, structured allocation, and actionable performance insights.

DriveCRM streamlines the entire lead lifecycle, from inquiry capture to conversion, while introducing automation features and analytical dashboards to support faster decision-making and improved conversion outcomes.

FEATURES

1. Lead Listing Screen : Centralized Lead Overview

● Displays all incoming leads in a structured tabular format with columns such as Name, Contact Number, Source, Assigned Salesperson, Status, and Priority.
 ● Enables quick filtering and sorting by platform, status, or sales representative.
 ● Includes a search functionality to instantly locate specific leads.
 ● Supports bulk actions such as status updates and lead assignment.

● Provides visual priority indicators (High, Medium, Low) for faster identification of hot leads.
● Clicking on any lead redirects to the detailed Lead Profile view.

2. Lead Details Screen : Complete Lead Profile View

● Provides a comprehensive view of the selected lead including contact information, source platform, preferred car model, budget range, and inquiry date.
 ● Displays a chronological activity timeline showing calls made, notes added, and status updates.
 ● Includes a status update dropdown (New, Contacted, Follow-up, Converted, Dropped).
 ● Allows sales executives to add interaction notes for better follow-ups.
 ● Includes a "Set Follow-up Reminder" option to reduce missed opportunities.

This screen ensures sales representatives have complete context before contacting the customer.

DriveCRM – Smart Lead Management

← Reports 👤

Shubhangi Gupta
Lead Source : Facebook

Salesperson (Attended By):   Raghav

[Update Lead Profile]

Contact Number   :   +91 9357198442
Gender   :   Female
Email Address   :   Shubhangi01@gmail.com
Full Address   :   16, Main Street, Noida, India
Vehicle Interested In :   SUV 600

Interaction History

H1 : Initial Commit
        20-09-2025

H2 : Follow-up Call
        22-09-2025

H3 : Test Drive Scheduled
        25-09-2025
              .

[Update]

Notes:

1. Shubhangi expressed strong interest in new SUV model, and is looking for a family vehicle with strong safety.
2. Scheduled a test drive for Friday
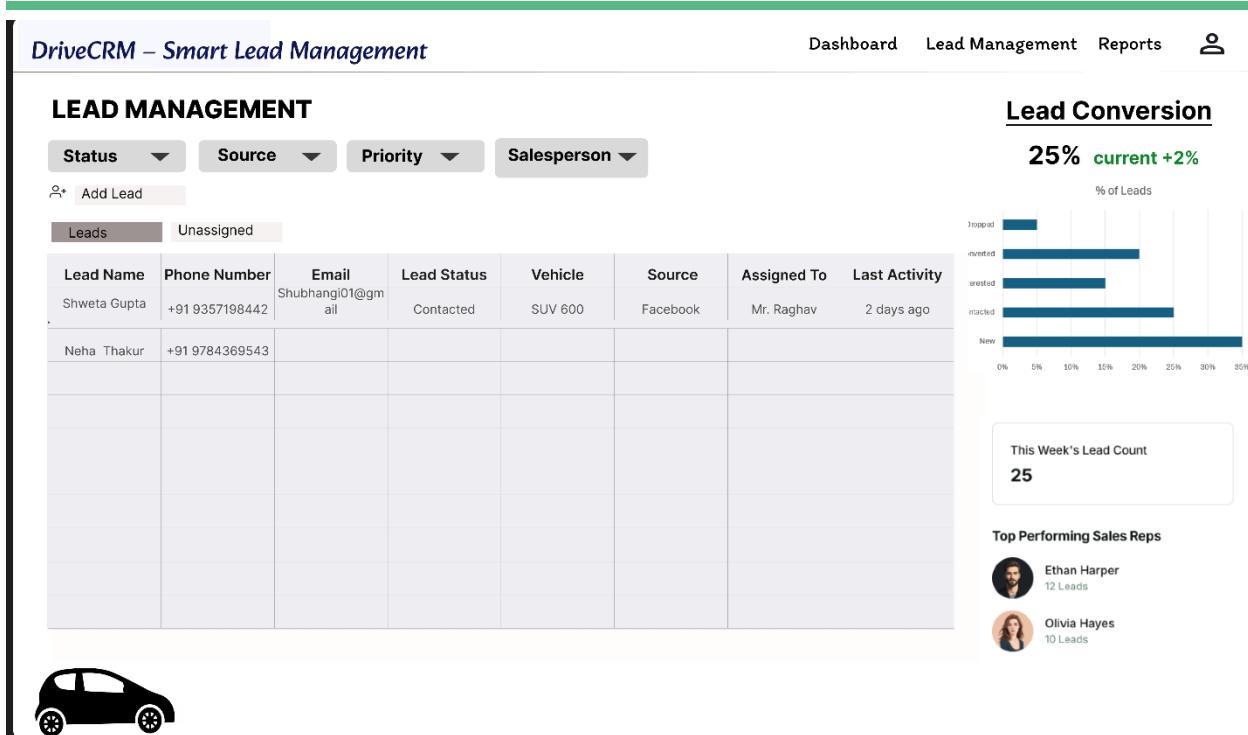
[Convert to Customer]

[Reassign]

3. Lead Management Screen : Allocation & Performance Tracking

● Enables managers to assign leads to sales executives based on availability and workload.
 ● Displays real-time lead status distribution across stages.
 ● Tracks conversion rates per salesperson to measure performance.
 ● Highlights uncontacted leads beyond 24 hours to improve response time.
 ● Shows total lead count, active leads, converted leads, and dropped leads.
 ● Provides workload visualization to ensure balanced distribution.
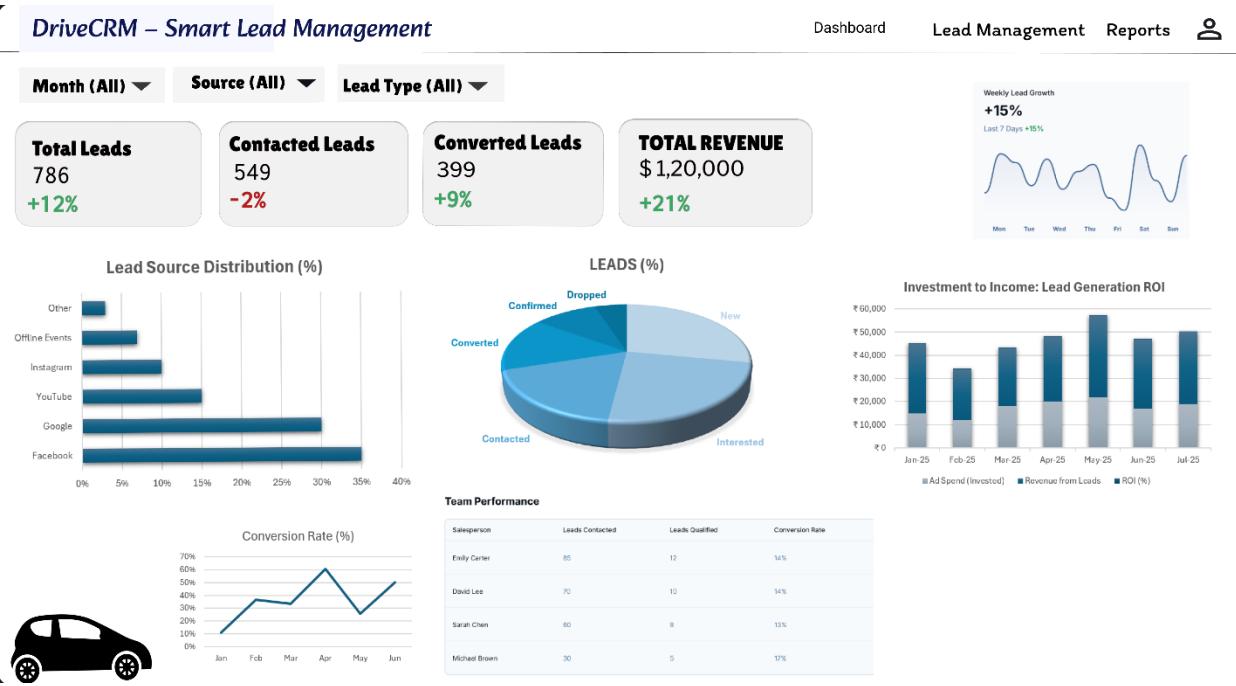
This module improves accountability, transparency, and operational efficiency.

DriveCRM – Smart Lead Management

Dashboard   Lead Management   Reports

LEAD MANAGEMENT

Status ▾   Source ▾   Priority ▾   Salesperson ▾

Add Lead

Leads   Unassigned

Lead Name	Phone Number	Email	Lead Status	Vehicle	Source	Assigned To	Last Activity
Shweta Gupta	+91 9357198442	Shubhangi01@gmail	Contacted	SUV 600	Facebook	Mr. Raghav	2 days ago
Neha Thakur	+91 9784369543						

Lead Conversion

25% current +2%

% of Leads

Dropped
Converted
Interested
Contacted
New

0% 5% 10% 15% 20% 25% 30% 35%

This Week's Lead Count
25

Top Performing Sales Reps

Ethan Harper
12 Leads

Olivia Hayes
10 Leads

4. Dashboard : Data-Driven Insights & KPIs

● Presents a high-level summary of all key performance indicators in one view.

● Includes:

- ● Line Chart: Leads trend over time

- ● Bar Chart: Salesperson performance comparison

- ● Pie Chart: Lead distribution by source

- ● Funnel View: Lead conversion stages
  - ● Allows filtering by date range, source platform, and sales executive.
  - ● Displays metrics such as total leads, conversion rate, average response time, and drop-off percentage.

The dashboard enables business managers to make data-driven decisions quickly.

DriveCRM – Smart Lead Management

Dashboard   Lead Management   Reports

Total Leads 786 +12%
Contacted Leads 549 -2%
Converted Leads 399 +9%
TOTAL REVENUE $1,20,000 +21%

Weekly Lead Growth +15% Last 7 Days +15%

Lead Source Distribution (%)
LEADS (%)
Investment to Income: Lead Generation ROI

Conversion Rate (%)

Team Performance

Salesperson	Leads Contacted	Leads Qualified	Conversion Rate
Emily Carter	85	12	14%
David Lee	70	10	14%
Sarah Chen	60	8	13%
Michael Brown	30	5	17%

WIREFRAME / MOCKUP / PROTOTYPE

The Lead Listing screen provides a centralized view of all incoming leads with filtering, sorting, and bulk action capabilities to improve operational efficiency.

The Lead Details screen presents in-depth customer information, activity logs, and follow-up tools to enhance personalized engagement.

The Lead Management screen focuses on allocation control, workload visibility, and conversion tracking to improve team productivity.

The Dashboard screen delivers visual insights into performance metrics, conversion funnels, and lead trends to support strategic decision-making.

USER FLOW

The user flow outlines how Sales Executives and Business Managers interact with DriveCRM:

1. View all leads in Lead Listing

2. Select a lead to view detailed information

3. Update status or add notes in Lead Details

4. Assign or reassign leads in Lead Management

5. Monitor performance and KPIs via Dashboard

The flow ensures a smooth and intuitive user journey across all modules.

KEY PRODUCT DECISIONS

● Introduced priority-based tagging to prevent high-value leads from being overlooked.
● Added follow-up reminders to reduce delayed responses.
● Implemented performance tracking to create measurable accountability.
● Designed dashboard filters to support granular data analysis.

SUCCESS METRICS

● Reduce average lead response time by 40%
● Increase overall conversion rate by 20%
● Improve sales team productivity by 30%
● Reduce manual tracking errors by 60%

FUTURE ENHANCEMENTS

● Integration of ML-based lead scoring to predict conversion probability
● Automated lead assignment based on historical performance
● WhatsApp / SMS integration for instant communication tracking

OTHER LINKS

DriveCRM transforms manual lead tracking into a structured, automated, and insight-driven system, enabling HSR Motors to improve efficiency, accountability, and conversion performance.

https://www.figma.com/design/YZePW3Nkz71nt5Tr0uGNER/DriveCRM-%E2%80%93-Smart-Lead-Management-System--Copy-?node-id=0-1&t=lNnwrl9OR07juL9Z-1