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DriveCRM – Smart Lead Management System

07/02/2026

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

DriveCRM – Smart Lead Management

Dashboard Lead Management Reports 

All Leads Add Lead Analytics

LEADS

Search Lead.....

Status Source Date

Lead Name	Phone Number	Email	Lead Type	Lead Status	Lead Source	Inquiry Date	Action
Shweta Gupta	+91 9357198442	Shubhangi01@gmail	New	Contacted	Facebook	20/07/2025	View
Neha Thakur	+91 9784369543						



- 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

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

Interaction	Date	Status
H1 : Initial Commit	20-09-2025	Called
H2 : Follow-up Call	22-09-2025	Called
H3 : Test Drive Scheduled	25-09-2025	Called

[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](#)



- 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.

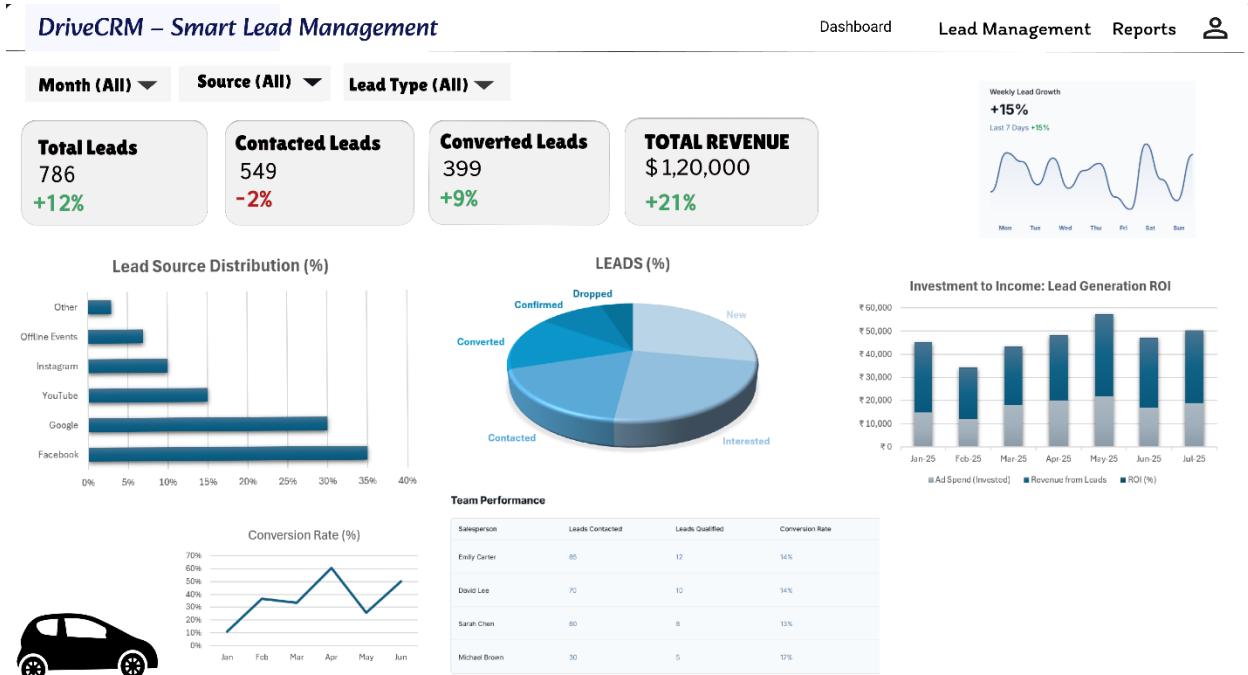
This screen ensures sales representatives have complete context before contacting the customer.

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.

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.

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
 - Improve lead-to-sale conversion rate
 - Increase sales team productivity
 - Improve visibility of lead source ROI
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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=INnwrl9OR07juL9Z-1>