CRM Gated Intelligence

Performance Enforcement & Compliance Guide v2.0

1. World-Standard Terminology

To prevent confusion between client categories and sales quotas, the system adopts international standards:

- Account Type: Identifies the NATURE of the client (e.g., Enterprise, Govt, SME). Found in Lead Forms.
- Targets: Identifies the sales GOALS and performance quotas for the Salesman. Managed in the Targets Hub.

2. Automated Gated Enforcement

The system uses a "Block-and-Review" protocol instead of traditional account deactivation.

How the Lock Works:
If a salesman fails a "Blocking Milestone", the CRM triggers a high-fidelity suspension overlay. This lock covers the entire application, preventing access to Leads and Deals.

The Recovery Path:
The only unlocked page during a suspension is the Performance Dashboard (/crm/targets). The salesman must visit this page to understand their failure and contact their manager for an appeal.

3. Strategic Target Initialization

When creating a mission, follow these strategic steps:

1. Select Agent(s):
Designate which salesman or team is responsible for the quota.
2. Set Blocking Gates:
Crucial! Set milestone deadlines. If a salesman must create 10 leads by the 15th, set it as a BLOCKING milestone. If they miss it, the app locks automatically.
3. Monitor Revenue Pulse:
Use the /crm/targets/management hub to see real-time team achievement vs strategy.

4. Technical Audit (How to test)

Verify the enforcement engine with these steps:

- CREATE: New target with a "Blocking" milestone and deadline set to YESTERDAY.
- SYNC: Go to Strategic Dashboard and click "Synchronize Team Data".
- VERIFY: Log in as that salesman. They should be immediately blocked by the Rose-Red Lockout screen.
- RESOLVE: As Admin, update or delete the milestone to lift the lock.