PERFORMANCE INSIGHT DOC

DOCUMENT CONTROL

- **DOCUMENT ID: PRI-NAWY-CRM-DB**
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- **DATE: DECEMBER 7,2025**
- **AUTHOR: MEYER HAMDI**
- **STATUES: PROPOSAL**
- **STAKEHOLDERS: SALES AGENTS, SALES MANAGERS, DIRECTORS, HEAD OF SALES, PM'S**

1.EXECUTIVE SUMMARY

- **1.1 Problem**
  - **The lake of the visibility of the performance of the sales person depends on the positive actions for the leads after rotation**
  - **Where is the stage that the sales stuck on it?**
- **1.2 Proposed Solution**
  - **A new "Performance Insight" dashboard module that provides two weighted metrics**
    - **error Rate (What percentage of my progressed leads convert elsewhere?)**
    - **success rate Conversion Rate (How effective am I at advancing reassigned leads?)**
- **1.3 expected impact**
  - **30-50% reduction in time spent manually tracking lead outcomes**
  - **15-25% reduction in number of leads that we lose and closing outside the organization**

2.Problem statement

- **2.1 current situation**
  - **NAWY's CRM provides descriptive analytics (Overview I & II) showing historical performance but lacks performance insights for skill development. The sales process follows +10 defined stages, and leads are frequently rotated between agents based on performance rules.**
- **2.2 core problem**

    - **"Sales agents cannot systematically identify which specific funnel stages need improvement because they lack visibility into percentage of leads that convert to positive stages after rotation."**
- **2.3 Evidence of the problem**
    - **Manual Workarounds Exist: Agents regularly ask managers about rotated leads**
    - **Delayed Feedback: Learning opportunities come too late for behavior change**
    - **Privacy Concerns: Detailed performance visibility across hierarchy**
- **2.4 affected users**

User Role	Impact Level	Primary Pain Point
Sales Agent	High	Cannot self-diagnose funnel weaknesses
Sales Manager	Medium	Inefficient coaching due to incomplete data
Team Leader	Medium	Cannot identify team-wide patterns
Head of Sales	Low	Lacks cross-zone conversion analytics

3.proposed solutions

- **3.1 solution overview**
  - A new dashboard module ("Overview III") that calculates and displays two weighted performance metrics based on existing CRM data and rules.
- **3.2 core metrics**
  - Error rate
    - Er = (Σ Weighted Positive Actions on leads that later progressed elsewhere) ÷ (Σ All Weighted Positive Actions) × 100
      - Agent takes 100 positive actions (weighted total: 250) 20 of those leads later progress with other agents (weighted value: 60)$OLR = 60 \div 250 \times 100 = 24\%$
  - Success rate
    - Sr = (Number of reassigned leads advanced by ≥1 positive action) ÷ (Total reassigned leads received) × 100
    - Sr = your fresh lead you closed ÷ total fresh leads you received * 100
      - Agent receives 50 reassigned leads Successfully advances 30 of them
      - $SR = 30 \div 50 \times 100 = 60\%$

4.Technical Implementation

- **4.1 data requirements**
  - The CRM already tracks:
    - Lead assignment history with timestamps
    - Status change history with agent attribution
    - Positive action definitions and weights
    - Rotation/reassignment events
- **4.2 Relationship needed(don’t trust me on this relationship haha)**

Lead → [Owner History] → [Status Changes] →[Subsequent Owners] → [Status Changes]

↑ ↑ ↑ ↑

Agent A Positive Action Agent B Positive Action

5.user stories requirement

- **5.1 user stories**
  - **As a sales agent I want to**
    - **See my Opportunity Loss Rate segmented by sales stage**
    - **Identify which specific status transitions have the highest error**
    - **Receive alerts when my metrics deviate significantly from baselines**
  - **As a sales manager I want**
    - **View team-level Opportunity Loss Rates by stage**
    - **Identify agents needing in the sales process**
    - **Track improvement in metrics over time**
    - **Export reports for performance reviews**
- **5.2 functional requirement**
  - **Export and report**
    - **Export metrics to PDF/Excel for performance reviews**
    - **Schedule automated report delivery**
    - **API access for integration with external dashboards**
  - **Dashboard display**
    - **Display both (er) and (sr) as primary metrics**
    - **Show trend arrows (improving/declining)**
    - **Allow filtering by date range (default: current quarter)**
    - **Enable drill-down by sales stage**
  - **Stage analysis view**
    - **Display funnel visualization with leakage percentages at each stage**
    - **Show "Top 3 Leakage Stages" for quick insight**
    - **Provide comparison to team/zone averages**
- **5.3 non-functional requirement**
  - **Security**
    - **Role-based access control (RBAC) following sales hierarchy**
    - **Data isolation between sales zones where required**
    - **Audit logging for all metric calculations**

6.risk analysis

- **6.1 High risk: culture resistance**
  - **Description: Agents may perceive metrics as punitive rather than developmental**
  - **Probability: Medium-High**
  - **Impact: High**
  - **Mitigation:**
    - **Phase 1: Manager-only access for coaching context**
    - **Clear communication: "Diagnostic tool, not report card"**
    - **Training emphasizing growth mindset**
- **6.2 Medium risk: data gaming**
  - **Description: Agents might manipulate status changes to improve metrics**
  - **Probability: Medium**
  - **Impact: Medium**
  - **Mitigation:**
    - **Use weighted system (existing NAWY weights)**
    - **Manager oversight and validation**
- **6.3 Medium Risk: Technical Complexity**
  - **Description: Lead lineage tracking across multiple rotations is complex**
  - **Probability: Medium**
  - **Impact: Medium**
  - **Mitigation:**
    - **Start with simple attribution (last positive action)**
    - **Iterative complexity increase**
    - **Thorough testing with historical data**
    - **Clear rollback plan**
- **6.4 Low Risk: Performance Impact**
  - **Description: Additional calculations may slow CRM performance**
  - **Probability: Low**
  - **Impact: Low**
  - **Mitigation:**
    - **Asynchronous calculation during off-peak hours**
    - **Database indexing optimization**
    - **Caching of calculated metrics**

7. Dependencies

- **CRM Data Integrity: Requires accurate status change tracking**
- **Weight System Consistency: Depends on existing NAWY action weights**
- **Training Resources: Need for proper feature introduction**

8.pros and cons

- **8.1 Pros**
  - **For Sales Agents:**
    - **Targeted Self-Improvement: Precise identification of weak funnel stages**
    - **Objective Feedback: Data-driven insights vs. subjective manager opinions**
    - **Reduced Admin Time: Eliminates manual lead tracking (est. 3-5 hours/week)**
    - **Competitive Motivation: Healthy comparison with team benchmarks**
    - **Career Development: Clear path for skill improvement**
  - **For Sales Management:**
    - **Efficient Coaching: Data identifies exactly who needs help with what**
    - **Performance Transparency: Objective metrics for reviews and promotions**
    - **Resource Allocation: Identify team strengths/weaknesses for optimal assignment**
    - **Predictive Analytics: Early warning for declining performance trends**
  - **For the Organization:**
    - **Increased Conversion Rates: Estimated 5-15% improvement through targeted coaching**
    - **Data Asset Utilization: Leverages existing CRM data for new insights**
    - **Reduced Turnover: Clear development path increases agent satisfaction**
    - **Competitive Advantage: Advanced analytics capability in real estate CRM**
    - **Scalable Coaching: Consistent feedback across all teams and zones**
- **8.2 Cons**

- **Implementation Challenges:**
  - **Development Cost: Estimated 200-300 engineering hours**
  - **Training Overhead: Requires training for 100+ sales staff**
  - **Change Management: Resistance to new performance visibility**
- **Cultural Risks:**
  - **Unhealthy Competition: Potential for toxic rivalry between agents**
  - **Metric Fixation: Agents might focus on metrics rather than customer relationships**

9. Alternative Solutions Considered

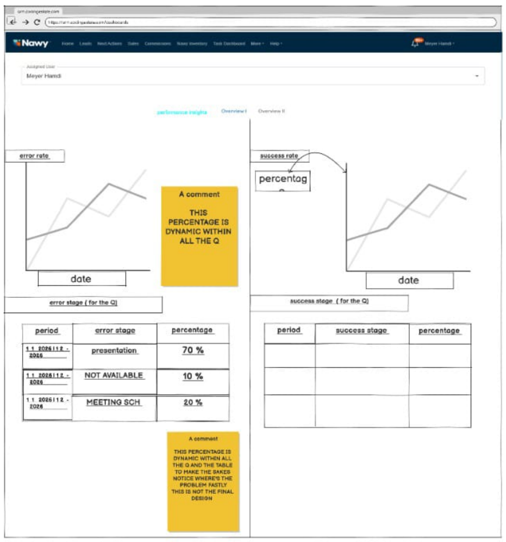
- **9.1 Do Nothing**
  - **Pros: No cost, no disruption**
  - **Cons: Missed improvement opportunity, continued inefficiency**
- **9.2 Enhanced Manager Reports**
  - **Pros: Lower cost, uses existing processes**
  - **Cons: Still manual, inconsistent, not scalable**
- **9.3 Simple Notification System**
  - **Pros: Low technical complexity, immediate alerts**
  - **Cons: Lacks analytical depth, could create alert fatigue**

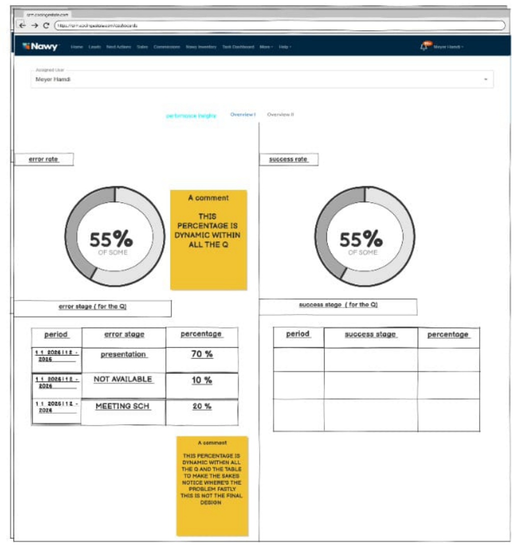
10. Success Criteria & Measurement

- **Quantitative Success Metrics**
  - **Adoption Rate: >70% of agents using dashboard weekly by Month 3**
  - **Time Savings: Reduction of ≥2 hours/week in manual tracking**
  - **Performance Improvement: 10% reduction in average (er) within 6 months**
  - **Data Quality: >95% accuracy in metric calculations (validated sample)**
  - **System Performance: <3 second dashboard load time for 95% of requests**

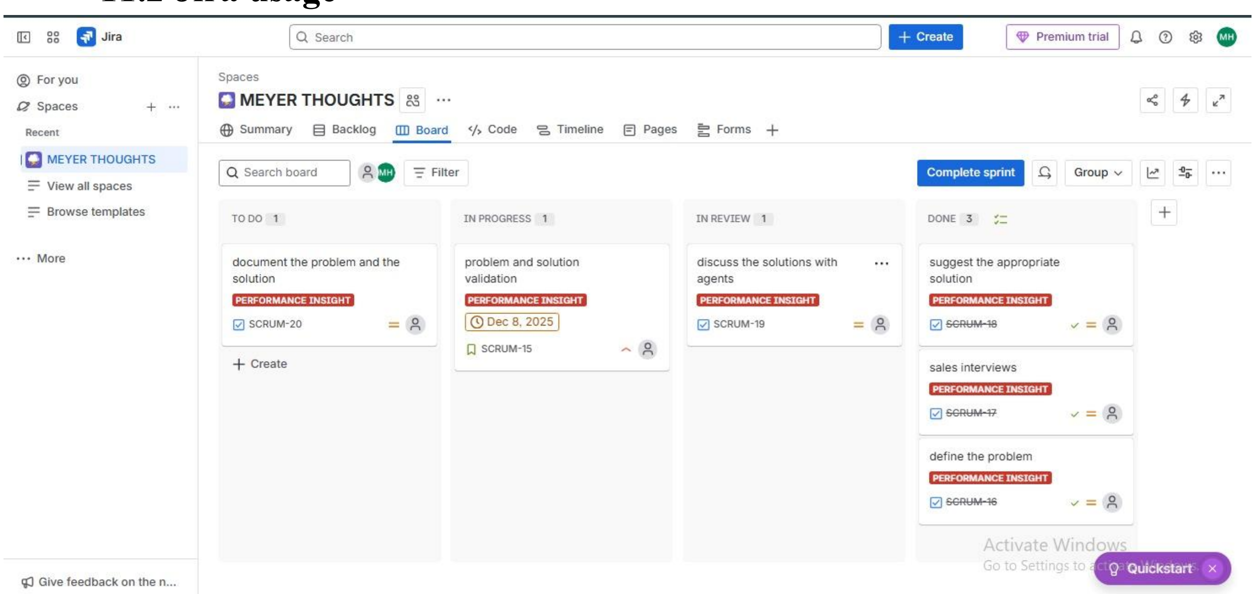
11. Appendices

- ## 11.1 Wireframe





- ## 11.2 Jira usage



12.Document Approval

- **Author: MEYER HAMDI**

THANK YOU