Muskan Khobre
0827CD221051

UnifyLeads.x

24/07/2025

OVERVIEW

HSR Motors, a car dealership, currently handles its lead management manually using spreadsheets, which poses limitations in real-time collaboration, data visibility, and efficient tracking. Understanding their pain points, I aimed to design a centralized, collaborative, and intuitive web application prototype using Figma that caters to both the Sales Team and the Business Manager.

The solution is tailored to streamline the entire lead journey—from capturing inquiries to closing sales, and conversion to customers while offering clarity, automation, and an analytics layer to improve decision-making.

FEATURES

1. Lead Listing Screen : Centralized Lead Table

- Displays all incoming leads in a tabular format with key columns like Name, Platform Source, Status, Type, etc.
- Enables the **Sales Team** and **Managers** to quickly scan, filter, and sort through leads.
- Supports **bulk actions** like assigning leads, status update, and exporting leads.
- It is then connected to the Lead details table that shows the complete details further

2. Lead Details Screen : Complete Lead Profile View

- Click on any lead from the list to view detailed information including contact details, lead source, interest, past communication, and timeline.
- **Sales Executives** use this screen to understand the customer better before contacting them.
- Includes status update dropdown, notes section, and activity log to improve **personalized follow-ups**.

3. Lead Management: Streamlined Allocation and Tracking

- Assign leads to specific salespersons to ensure clear ownership and accountability.
- Track real-time lead status — New, Contacted, Converted, Dropped — for quick decision-making and provides conversion analysis
- Includes priority levels based on lead responsiveness to avoid missing high-potential leads.
- Displays the top-performing salesperson based on conversion metrics.
- Shows the total lead count and helps in workload distribution.

4. Dashboard: Insightful Visual Analytics

- Provides a high-level overview of all lead-related KPIs in one place.
- Includes Line, Bar, and Column Stacked Charts to visualize trends and comparisons.
- Allows filtering by platform, sales rep, and lead status for more focused analysis.
- Displays performance summaries like total leads, conversions, drop-offs, and more.

WIREFRAME / MOCKUP / PROTOTYPE
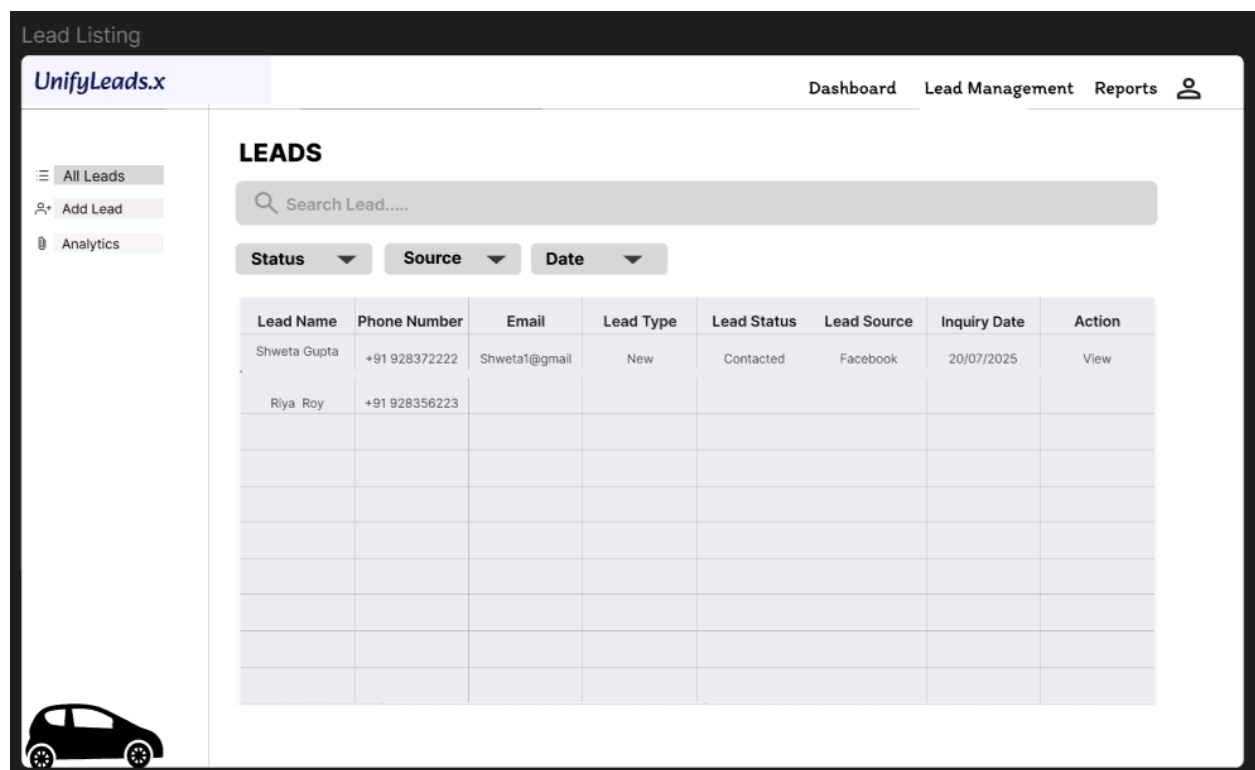
The **Lead Listing** page provides in-depth information about a selected lead including contact info, source, status history, and interaction notes.

The **lead Detail** page provides in-depth information about a selected lead including contact info, source, status history, and interaction notes.
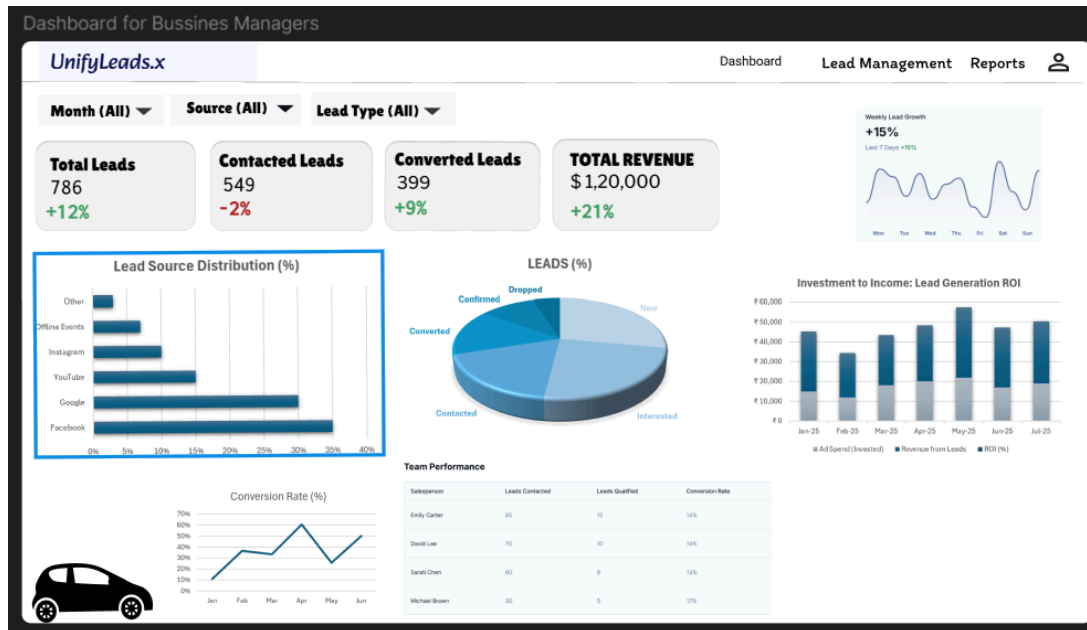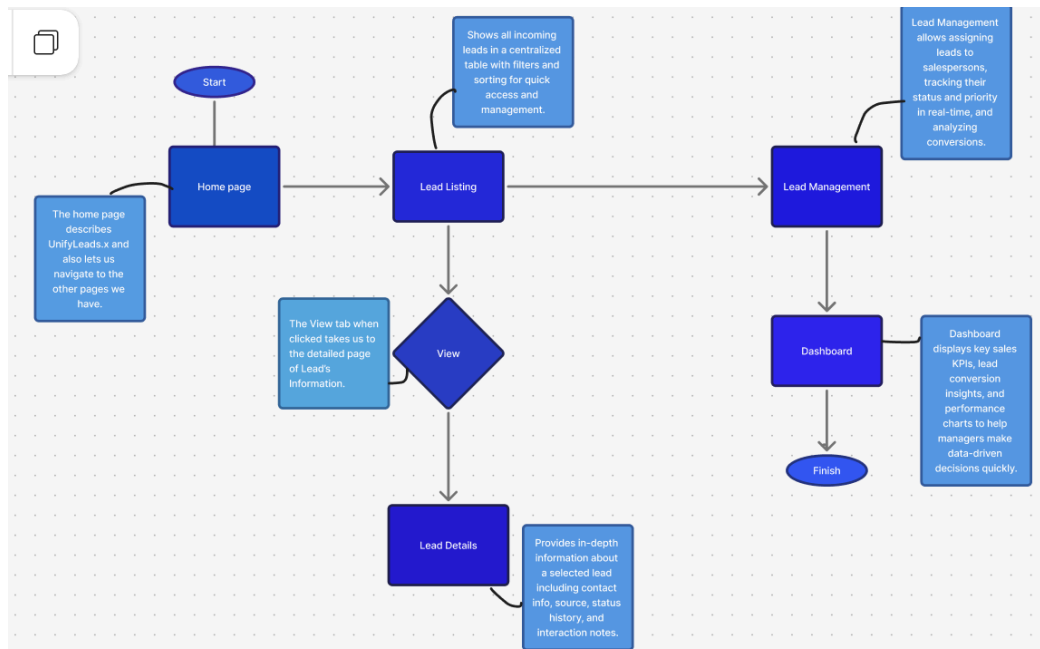

Lead Management allows assigning leads to salespersons, tracking their status and priority in real-time, and analyzing conversions and performance metrics for better decision-making.

Dashboard displays key sales KPIs, lead conversion insights, and performance charts to help managers make data-driven decisions quickly.

USER FLOW

The User Flow diagram provides a brief walkthrough of the prototype, outlining the main screens and navigation tabs to illustrate how users interact with the system.

OTHER LINKS

User Flow Diagram Link
:https://www.figma.com/board/JSVh3t0kvOo2KGySv6epLZ/Untitled?node-id=0-1&t=pWl6jAFTMRAgyrsN-1

Figma :
https://www.figma.com/design/Wlmduevc0AsdZuVzRCx1a8/Untitled?node-id=0-1&t=3YSQCzr5WA9F5mOB-1