

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**.

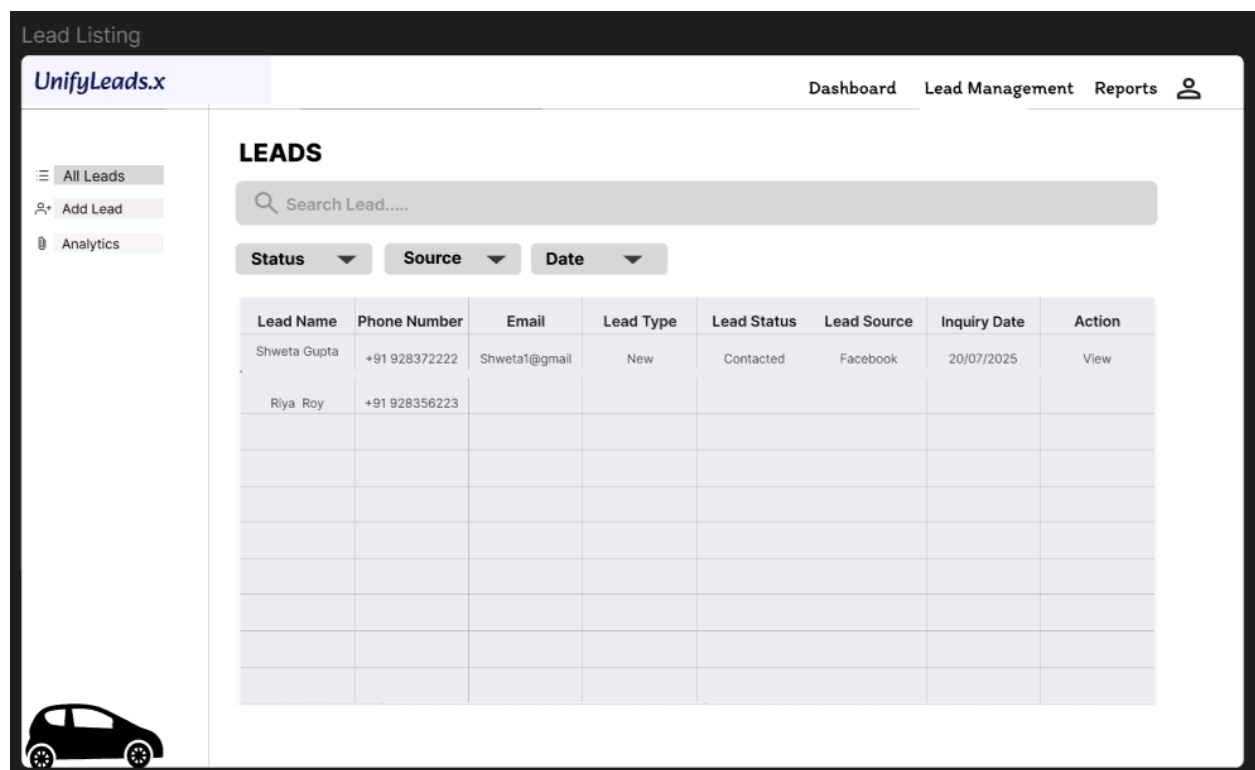
3. Lead Management: Streamlined Allocation and Tracking

- 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.

Lead Details

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Shweta Gupta

Lead Source : Facebook

Salesperson (Attended By): Rajeev Vyas

Update Lead Profile

Contact Number : +91 942577222

Gender : Female

Email Address : Shweta01@gmail.com

Full Address : 81, Main Street, Pune, India

Vehicle Interested In : SUV 700

Interaction History

H1 : Initial Commit
20-07-2025

H2 : Follow-up Call
22-07-2025

H3 : Test Drive Scheduled
25-07-2025

Update


Notes:

1. Shweta 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



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

Lead Management

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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 928372222	Shweta1@gmail	Contacted	SUV 700	Facebook	Mr. Rajeev Vyas	2 days ago
Riya Roy	+91 928356223						

Lead Conversion

25% current +2%

% of Leads

Target

Qualified

Interested

Reached

Followed

New

This Week's Lead Count

25


Top Performing Sales Reps

Ethan Harper

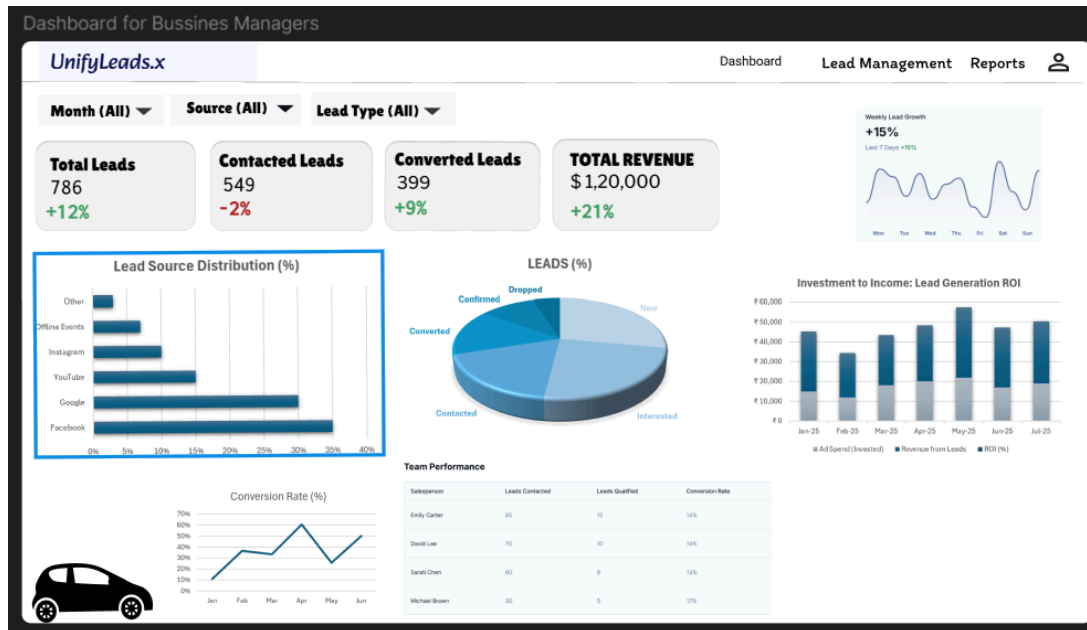
12 Leads

Olivia Hayes

10 Leads

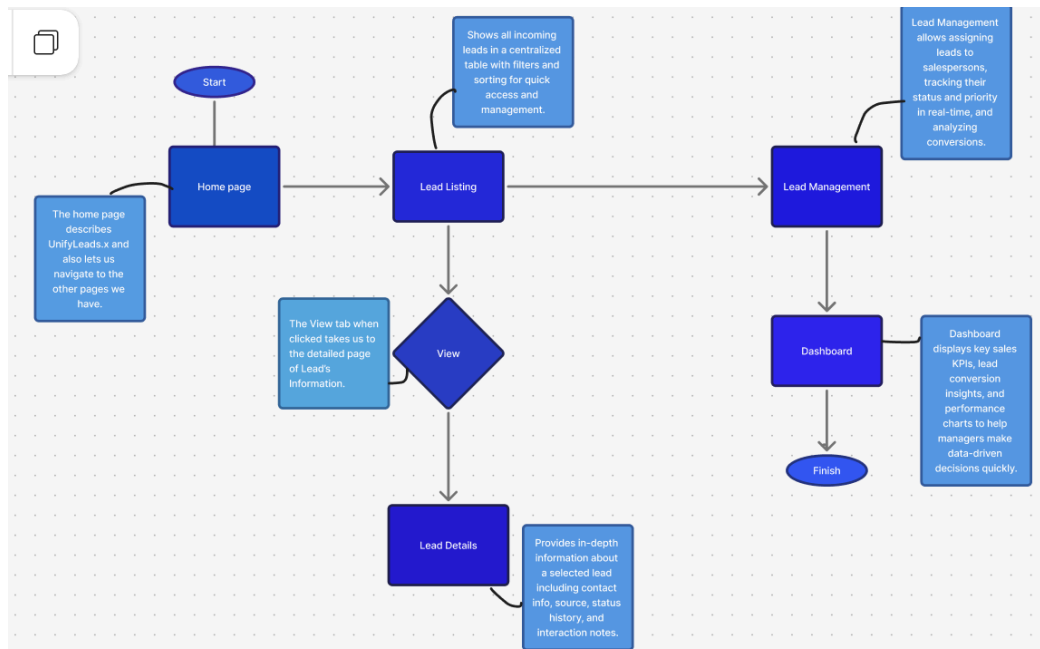


Lead Management allows assigning leads to salespersons, tracking their status and priority in real-time, and analyzing conversions and performance metrics for better decision-making.



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=pWl6jAFTMRAgysN-1](https://www.figma.com/board/JSVh3t0kvOo2KGySv6epLZ/Untitled?node-id=0-1&t=pWl6jAFTMRAgysN-1)

Figma :

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