

A Business Analysis Case Study (Sales Tracking – LMS) Document

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1. Problem Statement

V-Cosmetics is a new entrant in the beauty industry and is striving to establish its market presence. To achieve this, sales representatives must complete at least 10 retail store visits per day. However, sales managers face challenges in assigning and tracking these visits, and sales representatives struggle with managing their activities efficiently. Without a structured system, tracking leads, monitoring progress, and ensuring accountability becomes difficult, leading to inefficiencies in sales operations.

To address these challenges, the proposed system aims to streamline lead management, automate activity tracking, and enhance visibility across sales operations.

2. Business Requirements

1. Sales Manager must be able to assign and track leads.
2. Sales Reps must be able to manage and track the leads.
3. Sales Reps must be able to create, manage, and update their activities.
4. The System should provide visibility into lead status at both individual and aggregate levels.
5. The system must be compatible across various devices.
6. Security and accessibility controls must be implemented.
7. The system must support lead history tracking (configurable duration).
8. Sales Reps must receive timely notifications for planned activities.
9. The system should allow attendance tracking for sales reps.
10. The system should have a support process for issue resolution.
11. The system should provide downloadable reports for offline access (if required).
12. Performance must be optimized to avoid latency issues.
13. The system must support a secure authentication process, including unlocking procedures if needed.
14. The system must support integration with external CRM tools.
15. The system should support API-based integrations to allow seamless data exchange with external platforms, ensuring automation and efficiency in lead management.

3. User Stories

TITLE	USER STORY	ACCEPTANCE CRITERIA		PRIORITY	EFFORT ESTIMATION
Lead allocation (Manual & System-Assisted)	As a Sales Manager, I want to assign leads to my sales team through the strategic solution so that my sales team can efficiently work on their assigned leads.	1	The sales manager can view all unassigned leads in a centralized dashboard.	Must Have	8 Story Points
		2	The sales manager can assign leads to sales reps manually or use system-assisted rule-based allocation.		
		3	Sales reps receive notifications when new leads are assigned to them.		
		4	The system updates lead ownership status immediately after assignment.		
		5	Sales managers can reassign leads if needed.		
		6	The system maintains a history of lead assignments for tracking purposes.		
		7	Sales reps is able to work on leads assigned to them.		
Lead Assignment Automation (Advanced Feature)	As a Sales Manager, I want the system to automatically assign leads based on predefined rules (e.g., region, workload) so that I reduce manual effort and ensure faster lead distribution.	1	The system must allow configuration of lead assignment rules (e.g., region-based, workload-based).	Must Have	8 Story Points
		2	Leads should be automatically assigned to sales reps based on these rules without manual intervention.		
		3	Sales managers should be able to override assignments if necessary.		
		4	Sales reps receive automatic notifications when leads are assigned.		
		5	A log should be maintained for all automated lead assignments.		
Tracking leads at an individual level	As a Sales Manager, I want to track the status of each lead assigned to the sales team via the strategic solution so that I have regular updates on the status of every lead and can take necessary actions when needed.	1	The sales manager can access a centralized dashboard displaying all assigned leads.	Must Have	8 Story Points
		2	Each lead displays real-time status updates (e.g., "Contacted," "Follow-up Scheduled," "Closed - Won," "Closed - Lost").		
		3	The system allows filtering and sorting of leads based on different criteria (e.g., status, assigned sales rep, date).		
		4	Sales managers receive automated alerts for inactive leads that have not been updated for a defined period.		
		5	The system logs all updates made to each lead, including interactions and next steps.		
		6	The sales manager can generate reports summarizing lead progress and performance.		
		7	Sales reps can update lead status with relevant notes for better tracking.		
Tracking leads as a whole	As a Sales Manager, I want to track the status of all leads assigned to my sales team under a single view so that I can have an overall view of the assigned leads' status and make data-driven decisions efficiently.	1	The sales manager can access a single dashboard displaying all assigned leads with their respective statuses.	Must Have	8 Story Points
		2	The system provides aggregated insights, including total leads, leads in each status (e.g., "New," "In Progress," "Closed - Won," "Closed - Lost").		
		3	The system allows visual representation (charts, graphs, or heatmaps) to display lead distribution and trends.		
		4	Sales managers can filter leads based on region, product type, assigned sales rep, or time period.		
		5	The system enables bulk actions, such as reassigning multiple leads or setting follow-up reminders.		
		6	Sales managers receive alerts for aging leads that have been inactive beyond a predefined time.		
		7	Reports can be exported in PDF or Excel format for external analysis and presentations.		

TITLE	USER STORY	ACCEPTANCE CRITERIA		PRIORITY	EFFORT ESTIMATION
Tracking leads at an individual level – sales rep	<i>As a Sales Rep, I want to track the status of each lead assigned to me via the strategic solution so that I can have real-time updates on each lead's progress and take appropriate follow-up actions.</i>	1	The sales rep can log in and access a personalized dashboard displaying only the leads assigned to them.	Must Have	5 Story Points
		2	The system provides real-time status updates for each lead (e.g., "New," "Contacted," "Follow-up Scheduled," "Closed - Won," "Closed - Lost").		
		3	Sales reps can search and filter leads based on criteria such as lead type, priority, or date of last activity.		
		4	Sales reps can update lead statuses and add notes regarding conversations or actions taken.		
		5	The system allows setting reminders and follow-up tasks for each lead.		
		6	Sales reps receive alerts for leads that require immediate attention, such as overdue follow-ups.		
		7	The system provides lead history tracking, displaying previous interactions and changes in status.		
		8	Reports can be generated or exported for internal performance tracking.		
Tracking leads as a whole – sales rep	<i>As a Sales Rep, I want to track the status of all the leads assigned to me in a single view so that I can quickly assess the overall progress and prioritize follow-ups efficiently.</i>	1	The system provides a dashboard displaying all leads assigned to the sales rep.	Must Have	5 Story Points
		2	Leads are categorized by status (e.g., "New," "In Progress," "Follow-up Required," "Closed - Won," "Closed - Lost").		
		3	Sales reps can sort, filter, and search for leads based on urgency, priority, and recent activity.		
		4	The system highlights overdue leads that need immediate attention.		
		5	A visual summary (charts, graphs, or KPIs) is available to show lead conversion rates and progress.		
		6	Sales reps can click on a lead from the summary view to open its detailed information.		
		7	The system allows bulk actions (e.g., sending follow-up emails to multiple leads).		
		8	Sales reps receive real-time updates if lead statuses change due to system automation or manual updates by managers.		
Dashboard for Sales Performance Analytics	<i>As a Sales Manager, I want a dashboard that provides insights into lead conversion rates and rep performance so that I can make data-driven decisions.</i>	1	The dashboard must display lead conversion rates (weekly, monthly, quarterly).	Should Have	13 Story Points
		2	It should include individual sales rep performance metrics (e.g., leads assigned vs. closed).		
		3	Data should be filterable by time period, region, and sales rep.		
		4	The dashboard must be updated in real time or near real-time.		
		5	Export functionality should be available for reporting.		
Creating leads	<i>As a Sales Rep, I want to create new leads directly in the strategic solution so that I can capture potential sales opportunities efficiently within the system.</i>	1	The system provides a "Create Lead" option accessible to sales reps.	Must Have	8 Story Points
		2	Sales reps can enter key details such as: Lead Name, Contact Information (Phone, Email), Company Name, Lead Source (Website, Referral, Cold Call, etc.), Lead Status (New, In Progress, Follow-up, etc.)		
		3	The system enforces mandatory fields to ensure essential lead details are captured.		
		4	The lead creation form provides dropdowns and auto-suggestions where applicable (e.g., existing company names).		
		5	Leads are automatically timestamped upon creation.		
		6	The system validates the input (e.g., no duplicate leads with the same email and phone number).		
		7	Sales reps receive a confirmation message upon successful lead creation.		
		8	The newly created lead is immediately visible in the sales rep's lead list for tracking.		

TITLE	USER STORY	ACCEPTANCE CRITERIA		PRIORITY	EFFORT ESTIMATION
Managing leads	<i>As a Sales Rep, I want to update and manage the status of my assigned leads in the strategic solution so that I can track progress, prioritize tasks, and ensure timely follow-ups.</i>	1	The system provides a lead status dropdown menu for sales reps.	Must Have	8 Story Points
		2	Sales reps can update lead status to predefined categories such as: New, Contacted, Follow-up Scheduled, Negotiation, Closed-Won, Closed-Lost (with reason selection)		
		3	When marking a lead as Closed-Lost, the system prompts the sales rep to select a reason (e.g., Budget Constraints, No Interest, Chose Competitor).		
		4	The system logs the timestamp and user details for every status change.		
		5	Leads in Closed-Won and Closed-Lost states become read-only to prevent accidental modifications.		
		6	The updated status is instantly visible to the sales manager for tracking.		
		7	A confirmation message appears after every successful status update.		
		8	The system ensures that changes are auto-saved and synced across all views.		
Automatic Lead Import via API	<i>As a Sales Manager, I want to automatically pull new leads from external sources (e.g., website forms, third-party databases) via APIs so that my team can act on fresh leads without manual entry.</i>	1	The system automatically imports new leads from configured external sources (e.g., website forms, third-party CRM).	Must Have	8 Story Points
		2	Imported leads should be assigned based on pre-defined rules (e.g., region, workload).		
		3	Duplicates should be detected and flagged before adding to the system.		
		4	Sales Managers can review and approve imported leads before they become active in the system.		
		5	The system should generate an alert if the API connection fails.		
Rule-Based Lead Assignment via API	<i>As a Sales Manager, I want to configure lead assignment rules (e.g., region-based, workload-based) via an API so that we can dynamically adjust distribution without manual intervention.</i>	1	The system allows Sales Managers to define lead assignment rules based on region, product type, workload, or priority level.	Could Have	8 Story Points
		2	New leads are automatically assigned to sales reps as per the configured rules.		
		3	Sales Managers can modify these rules through the API without requiring IT support.		
		4	If no rules match a lead, it should be placed in an "Unassigned Leads" queue for manual allocation.		
		5	The system should log all assignment changes for audit purposes.		
Creating Planned activities	<i>As a Sales Rep, I want to create and log my daily planned activities related to leads in the strategic solution so that I can organize my tasks, track my progress, and ensure timely follow-ups.</i>	1	Sales reps can create new activities and categorize them as: Call, Meeting, Email, Follow-up Task, Product Demo/Presentation	Must Have	8 Story Points
		2	Each activity allows the sales rep to: <ul style="list-style-type: none"> - Link it to a specific lead or opportunity. - Set a due date and time. - Add notes or descriptions for context. 		
		3	The system provides an option to set reminders for activities.		
		4	Sales reps can mark activities as completed once done.		
		5	The system automatically logs: <ul style="list-style-type: none"> - The creator of the activity. - Timestamp of creation and completion. 		
		6	Activities should be visible under a "My Tasks" dashboard for easy tracking.		
		7	Sales managers can view activity logs to monitor engagement levels.		
		8	A notification is triggered if an activity is overdue.		
		9	The system prevents duplicate entries for the same activity type on the same lead within a short timeframe.		

TITLE	USER STORY	ACCEPTANCE CRITERIA	PRIORITY	EFFORT ESTIMATION
Managing planned activities	<i>As a Sales Rep, I want to update, modify, reschedule, and track my daily planned activities in the strategic solution so that I can efficiently manage my tasks and stay on top of my sales pipeline.</i>	1 Sales reps can view all planned activities in a structured dashboard (sorted by due date, priority, or lead).	Must Have	8 Story Points
		2 Sales reps can edit activity details, including: <ul style="list-style-type: none"> - Type of activity (Call, Meeting, Email, Follow-up, Demo). - Date and time. - Associated lead/opportunity. - Notes or comments. 		
		3 Sales reps can reschedule an activity if needed.		
		4 Sales reps can cancel an activity, with an option to add a cancellation reason.		
		5 Sales reps can mark activities as completed, updating the activity history.		
		6 The system should provide visual indicators for pending, completed, and overdue activities.		
		7 A reminder notification is triggered for upcoming or overdue activities.		
		8 Sales managers can view activity logs for monitoring.		
		9 The system prevents duplicate updates from different users at the same time (conflict resolution).		
Integration with CRM (Future Expansion)	<i>As a Sales Rep & Sales Manager, I want the system to be integrated with CRM tools (e.g., Salesforce, HubSpot) so that I can seamlessly manage customer interactions.</i>	1 The system should support API integration with major CRM platforms (Salesforce, HubSpot, etc.).	Should Have	13 Story Points
		2 Leads assigned or updated in the sales system should sync with the CRM.		
		3 Sales reps should be able to access customer history from the CRM within the sales solution.		
		4 Error handling mechanisms must be in place for failed syncs.		
		5 A log of all CRM sync activities should be maintained.		
Compatibility with all devices	<i>As a Sales Manager & Sales Rep, I want the strategic solution to work seamlessly on all types of devices (desktop, laptop, tablet, and mobile) so that I can access and manage leads, activities, and sales updates anytime, anywhere.</i>	1 The strategic solution must be fully responsive, automatically adjusting layout and UI for: <ul style="list-style-type: none"> - Desktop & Laptop (Windows, macOS) - Tablets (iOS, Android) - Mobile Phones (iOS, Android). 	Could Have	8 Story Points
		2 The system should support touch-based interactions (swiping, tapping, scrolling) for mobile and tablet users.		
		3 Users should be able to perform all key actions seamlessly on any device, including: <ul style="list-style-type: none"> - Lead management (view, assign, track) - Activity tracking and updates - Notifications and alerts. 		
		4 The interface should ensure fast loading times on mobile networks.		
		5 The solution should be cross-browser compatible (Chrome, Safari, Edge, Firefox).		
		6 A mobile-friendly navigation menu should replace the desktop layout when accessed via mobile/tablet.		
		7 Data should sync in real-time across all devices (no delays in lead or activity updates).		
		8 No critical features should be missing when accessed from a mobile or tablet.		
		9 Users should receive push notifications (if enabled) for important updates.		
Marking attendance	<i>As a Sales Manager, I want sales reps to be able to mark their attendance via the strategic solution so that I can track their working hours, attendance trends, and ensure compliance with work policies.</i>	1 Sales reps must be able to mark their attendance via the strategic solution using: <ul style="list-style-type: none"> - A "Mark Attendance" button on the dashboard - Automatic timestamp generation upon check-in and check-out. 	Could Have	5 Story Points
		2 The system should record the date and time of attendance marking.		
		3 If location tracking is enabled, the system should capture the sales rep's location at the time of marking attendance.		
		4 Sales managers should have access to an attendance dashboard showing: <ul style="list-style-type: none"> - Daily, weekly, and monthly attendance logs - Absentee reports - Attendance trends for individual sales reps. 		
		5 Sales reps should receive a confirmation message upon successful attendance marking.		
		6 The system should prevent duplicate check-ins for the same day.		
		7 Sales managers should be able to export attendance reports for further analysis.		

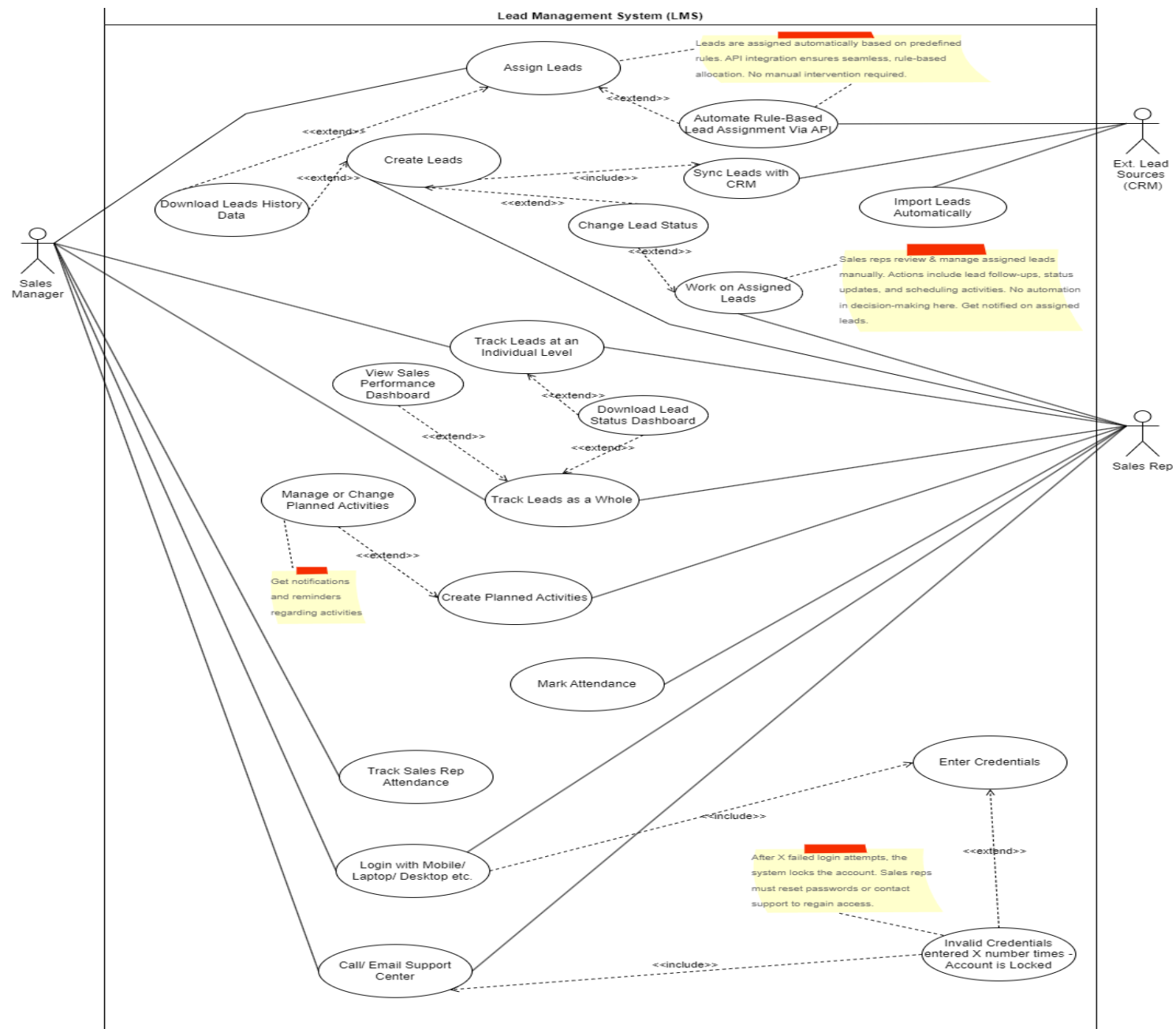
TITLE	USER STORY	ACCEPTANCE CRITERIA	PRIORITY	EFFORT ESTIMATION
Notification	<i>As a Sales Manager, I want sales reps to be notified about any planned activity for the particular day via the strategic solution so that they can plan their workday efficiently and never miss important tasks.</i>	<div>1 Sales reps should receive daily notifications about their scheduled activities for the day.</div> <div>2 Notifications should include: <ul style="list-style-type: none"> - Activity details (title, time, type of activity) - Customer name (if applicable) - Location (if applicable) - Priority status (e.g., high, medium, low). </div> <div>3 Sales reps should be notified via: <ul style="list-style-type: none"> - In-app notifications within the strategic solution - Email alerts (optional, based on user preference) - SMS notifications (if enabled). </div> <div>4 The system should send reminders at predefined intervals (e.g., 1 hour before, 15 minutes before).</div> <div>5 Sales reps should have the option to acknowledge a notification, marking it as "Seen."</div> <div>6 If a sales rep misses a planned activity, the system should send a follow-up notification.</div> <div>7 Sales managers should have an option to review notification logs for their sales team.</div>	Could Have	5 Story Points
History data	<i>As a Sales Manager & Sales Rep, I want to be able to download lead history for the past one year via the strategic solution so that I have access to historical data for performance analysis, reporting, and decision-making.</i>	<div>1 Users should be able to access lead history data for the past 12 months.</div> <div>2 The system should allow users to apply filters such as: <ul style="list-style-type: none"> - Date range (within the past year) - Lead status (open, won, lost, pending) - Assigned sales rep. </div> <div>3 Users should be able to export data in Excel/CSV format.</div> <div>4 The download should be processed efficiently without affecting system performance.</div> <div>5 Data access should be restricted based on user roles (e.g., Sales Managers can view all data, while Sales Reps can only view their assigned leads).</div> <div>6 The system should ensure data privacy and security compliance (e.g., GDPR if applicable).</div>	Will Not Have	8 Story Points
Downloadable dashboard	<i>As a Sales Manager & Sales Rep, I want the lead status dashboard to be downloadable in Excel format via the strategic solution so that I can access and analyze lead data offline whenever needed.</i>	<div>1 Users should be able to download the lead status dashboard in Excel format.</div> <div>2 The downloaded file should include: <ul style="list-style-type: none"> - Lead status breakdown (e.g., open, won, lost, pending) - Sales rep assignments - Conversion rates and other key metrics - Filters applied in the dashboard view. </div> <div>3 The download process should be quick and optimized to prevent performance issues.</div> <div>4 Role-based access control: Sales Managers can download team-wide data, while Sales Reps can download only their assigned leads.</div> <div>5 The exported data should be formatted for easy readability.</div>	Will Not Have	3 Story Points
Latency	<i>As a Sales Manager, I want the strategic solution to have minimal latency so that it provides a seamless experience across all devices without performance delays.</i>	<div>1 The solution should load within 3 seconds for key operations like: <ul style="list-style-type: none"> - Viewing and updating lead status - Searching/filtering leads - Managing planned activities. </div> <div>2 The system should handle at least X concurrent users without performance degradation. (Exact number depends on system architecture.)</div> <div>3 Latency should remain under Y milliseconds for API responses. (To be defined based on testing.)</div> <div>4 The solution should be optimized for mobile networks, ensuring smooth performance even on 4G or weaker connections.</div> <div>5 Implement caching mechanisms to reduce repeated data fetch times.</div>	Should Have	5 Story Points

TITLE	USER STORY	ACCEPTANCE CRITERIA		PRIORITY	EFFORT ESTIMATION
Support process	<i>As a Sales Manager, I want a dedicated support process to be created around the strategic solution so that the team can quickly reach out for assistance in case of any issues with the solution.</i>	1	A support contact center is available via phone, email, and in-app chat during business hours.	Could Have	8 Story Points
		2	Users can log tickets directly within the strategic solution for non-urgent issues.		
		3	A self-service knowledge base with FAQs and troubleshooting guides is accessible within the solution.		
		4	The system provides an automated acknowledgment upon issue reporting with a ticket number for tracking.		
		5	Critical issues are escalated within X hours to the next support level if unresolved. (Define X based on SLA expectations.)		
		6	A monthly report on recurring issues is generated to help improve system performance.		
Accessibility	<i>As a Sales Manager, I want the strategic solution to be accessible only through valid credentials so that only authorized personnel can use it, ensuring data security and restricted access.</i>	1	Users must log in using valid credentials (username & password).	Must Have	5-8 Story Points
		2	The system enforces role-based access control (RBAC), restricting features based on the user's role (e.g., sales rep vs. manager).		
		3	Multi-factor authentication (MFA) is required for high-privilege users (e.g., managers, admins).		
		4	Account lockout mechanism triggers after multiple failed login attempts.		
		5	Session timeout logs users out automatically after X minutes of inactivity. (Define X based on security policies.)		
		6	Access logs are maintained, tracking login attempts, device information, and suspicious activities.		
Invalid attempts	<i>As a Sales Manager, I want the solution to be locked after X number of invalid login attempts so that unauthorized access is prevented, ensuring security against brute-force attacks.</i>	1	If a user enters incorrect credentials X times (e.g., 5 attempts), the account is temporarily locked.	Will Not Have	5-8 Story Points
		2	The system displays an appropriate error message informing the user of the lockout.		
		3	The user can regain access through one of the following methods: <ul style="list-style-type: none"> - Waiting for a cooldown period (e.g., auto-unlock after 10 minutes) - Receiving an email with a password reset link - Admin manually unlocking the account from the backend. 		
		4	Lockout attempts and security incidents are logged for audit purposes.		
Process of unlocking	<i>As a Sales Manager, I want a defined process to unlock user accounts after X number of invalid login attempts so that legitimate users can regain access after proper verification.</i>	1	Users who exceed X invalid login attempts get locked out and see a relevant error message.	Will Not Have	5-8 Story Points
		2	The system provides unlocking options, such as: <ul style="list-style-type: none"> - Auto-unlock after a set period (e.g., 10 minutes) - Sending an unlock link to the registered email. - Admin manually unlocking the account from the backend. 		
		3	All unlock attempts are logged for audit purposes.		
		4	The system follows proper authentication and verification before unlocking.		

4. Mapping All User Stories to Business Requirements

Business Requirement	Mapped User Stories
BR 1: Sales Manager must be able to assign and track leads.	US 1: Assigning leads, US 2: Tracking leads, US 20: Lead Assignment Automation
BR 2: Sales Reps must be able to manage and track the leads.	US 3: Viewing assigned leads, US 7: Managing leads
BR 3: Sales Reps must be able to create, manage, and update their activities.	US 8: Creating activities, US 9: Managing planned activities
BR 4: The system should provide visibility into lead status at both individual and aggregate levels.	US 4: Viewing lead details, US 5: Searching & filtering leads, US 6: Viewing lead history (excluded as "Will not have")
BR 5: The system must be compatible across various devices.	US 10: Compatibility with all devices
BR 6: Security and accessibility controls must be implemented.	US 17: Accessibility (valid credentials), US 18: Invalid attempts (lockout mechanism), US 19: Process of unlocking
BR 7: The system must have a notification mechanism.	US 12: Notification system
BR 8: The system should allow marking attendance.	US 11: Marking attendance
BR 9: The system should allow a support process in case of issues.	US 16: Support process
BR 10: The system should have minimal latency issues.	US 15: Latency optimization
BR 11: The system should allow reporting features.	US 14: Downloadable dashboard (Excluded as "Will not have"), US 21: Sales Performance Analytics Dashboard
BR 12: The system should allow historical data retrieval.	US 13: History data (Excluded as "Will not have")
BR 13: The system should support lead status updates.	US 7: Managing leads
BR 14: The system must support integration with external CRM tools.	US 22: CRM Integration
BR 15: The system should support API-based integrations to allow seamless data exchange with external platforms, ensuring automation and efficiency in lead management.	US 23: Automatic Lead Import via API, US 24: Rule-Based Lead Assignment via API

5. Use Case Diagram



6. Use Case Specifications

6.1 Login with Mobile/Laptop/Desktop

1. Brief Description

This use case allows users to log into the system using a mobile, laptop, or desktop device. Successful authentication grants access to the system's features based on the user's role and permissions.

2. Pre-conditions

- The user must have valid login credentials (username and password).
- The device must be connected to the internet.
- The system must be operational.

3. Flow of Events

Basic Flow (Successful Scenario):

- The user navigates to the login page on their device.
- The system prompts the user to enter their credentials (username and password).
- The user enters valid credentials and submits the request.
- The system verifies the credentials.
- If authentication is successful, the user is granted access to the system dashboard.
- The system logs the successful login attempt.

Alternative Flows:

Invalid Credentials:

- The user enters incorrect credentials.
- The system displays an error message and prompts the user to re-enter credentials.

Account Locked:

- If the user fails to log in after multiple attempts (e.g., 5 failed attempts), the system locks the account.

- The system notifies the user via email/SMS and instructs them to reset their password or contact support.

Forgot Password:

- The user clicks on the "Forgot Password" option.
- The system prompts the user to enter their registered email/phone number.
- A password reset link is sent to the user's email/phone.
- The user resets the password and logs in successfully.

4. Post-Conditions

- If login is successful, the user is redirected to the system dashboard.
- If login fails, an error message is displayed, and the system logs the failed attempt.
- If the account is locked, the system prevents further login attempts until the password is reset or support unlocks it.

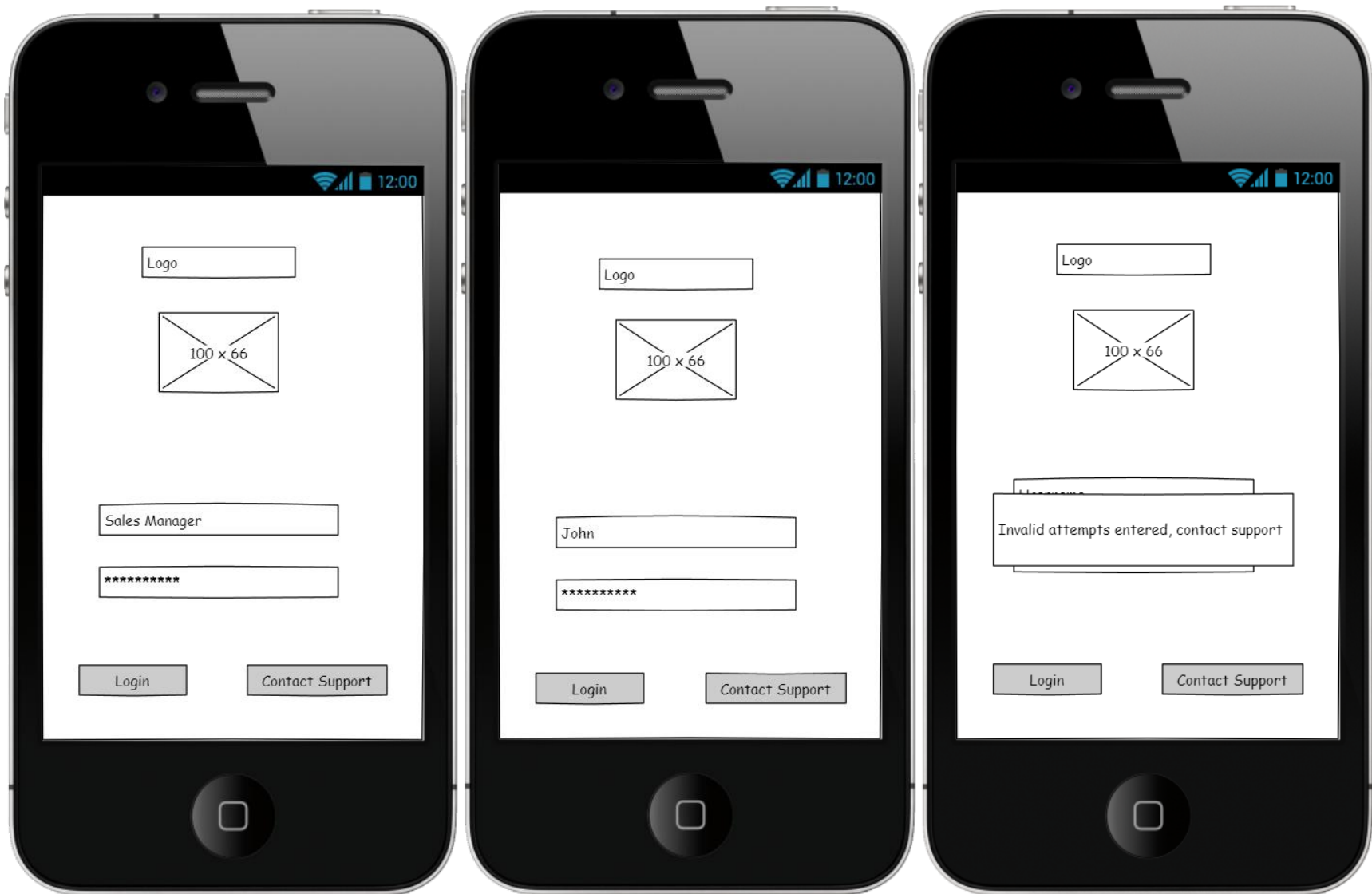
5. Extension Points

- Multi-Factor Authentication (MFA)
- Biometric Authentication (if applicable)

6. Includes

- Password Recovery Process (if the user forgets the password)
- System Lockout Mechanism (if login attempts exceed the allowed limit)

6.2 Wireframes



(Left to Right): Sales Manager Login, Sales Rep Login, Invalid Attempts

6.3 Assign Leads

1. Brief Description

This use case enables managers or authorized users to assign leads to sales representatives. The system ensures that each lead is allocated based on predefined criteria such as region, expertise, or workload distribution.

2. Pre-conditions

- The user must have the necessary permissions to assign leads.
- The lead must exist in the system.
- The sales representatives must be active in the system.

3. Flow of Events

- Basic Flow (Successful Scenario):
 - The manager logs into the system and navigates to the "Leads" section.
 - The system displays a list of unassigned leads.
 - The manager selects a lead and chooses a sales representative from the list.
 - The system assigns the lead to the selected sales representative.
 - The system updates the lead status to "Assigned."
 - The assigned sales representative receives a notification about the new lead.
- Alternative Flows:
 - Auto-Assignment Based on Rules:
 - Instead of manual assignment, the system automatically assigns leads based on predefined rules (e.g., region, workload).
 - The system updates the lead status to "Assigned" and notifies the respective sales representative.
 - Lead Already Assigned:
 - If the lead has already been assigned, the system prevents duplicate assignments.
 - The manager is notified that the lead is already allocated.
 - Sales Representative Unavailable:
 - If the selected sales representative is unavailable (e.g., on leave), the system displays an alert.
 - The manager is prompted to select another available representative.

4. Post-Conditions

- The lead is successfully assigned to a sales representative.
- The system records the assignment in the database.
- The assigned sales representative is notified.

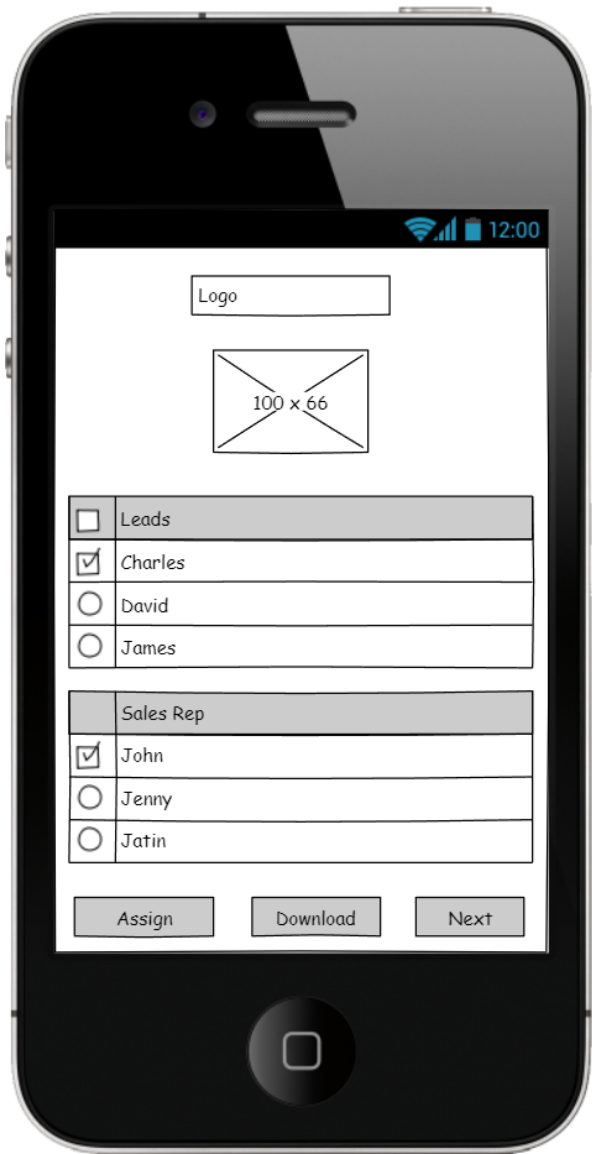
5. Extension Points

- Automatic Lead Distribution (if enabled)
- Escalation Mechanism (if lead remains uncontacted)

6. Includes

- Lead Notification Process (notifying the sales representative about the new lead)
- Reassignment Mechanism (if a lead needs to be reassigned)

6.4 Wireframes



Assign Leads

6.5 Create Leads

1. Brief Description

Sales representatives create new leads in the system and synchronize them with the CRM (Customer Relationship Management system). This is a key responsibility for sales reps as they manage potential customers.

2. Pre-conditions

- Sales rep is logged into the system.
- Sales rep has the necessary permissions to create leads.
- The CRM is integrated and accessible for syncing leads.
- The system has an active internet connection for syncing data with the CRM.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - Sales rep navigates to the "Create Lead" section in the system.
 - Sales rep enters all necessary information for the lead, such as:
 - Lead name
 - Contact details (email, phone number)
 - Company name (if applicable)
 - Lead source (e.g., web form, referral, etc.)
 - Status (e.g., new, qualified)
 - The system validates the entered information (e.g., email format, mandatory fields).
 - Once validated, the sales rep clicks "Create" to save the lead.
 - The lead is successfully created in the system.
 - The system automatically syncs the lead with the CRM.
 - A confirmation message is shown to the sales rep confirming the successful creation and sync of the lead.
- Alternative Flows:
 - Invalid Input:
 - If the sales rep enters invalid or incomplete information, the system displays an error message highlighting the fields that need correction (e.g., invalid email format, missing lead details).
 - Sales rep corrects the input and clicks "Create" again.

- CRM Sync Failure:
 - If the CRM sync fails due to an internet connection issue or CRM downtime, the system displays an error message and prompts the sales rep to try syncing again later.
 - The lead is saved in the system but remains unsynced until the issue is resolved.
 - Once the sync issue is resolved, the system retries syncing the lead with the CRM.

4. Post-Conditions

- The new lead is successfully created in the system and stored in the database.
- The lead is synced with the CRM, making it available for follow-up and tracking.
- The lead data is available for reporting and analysis.

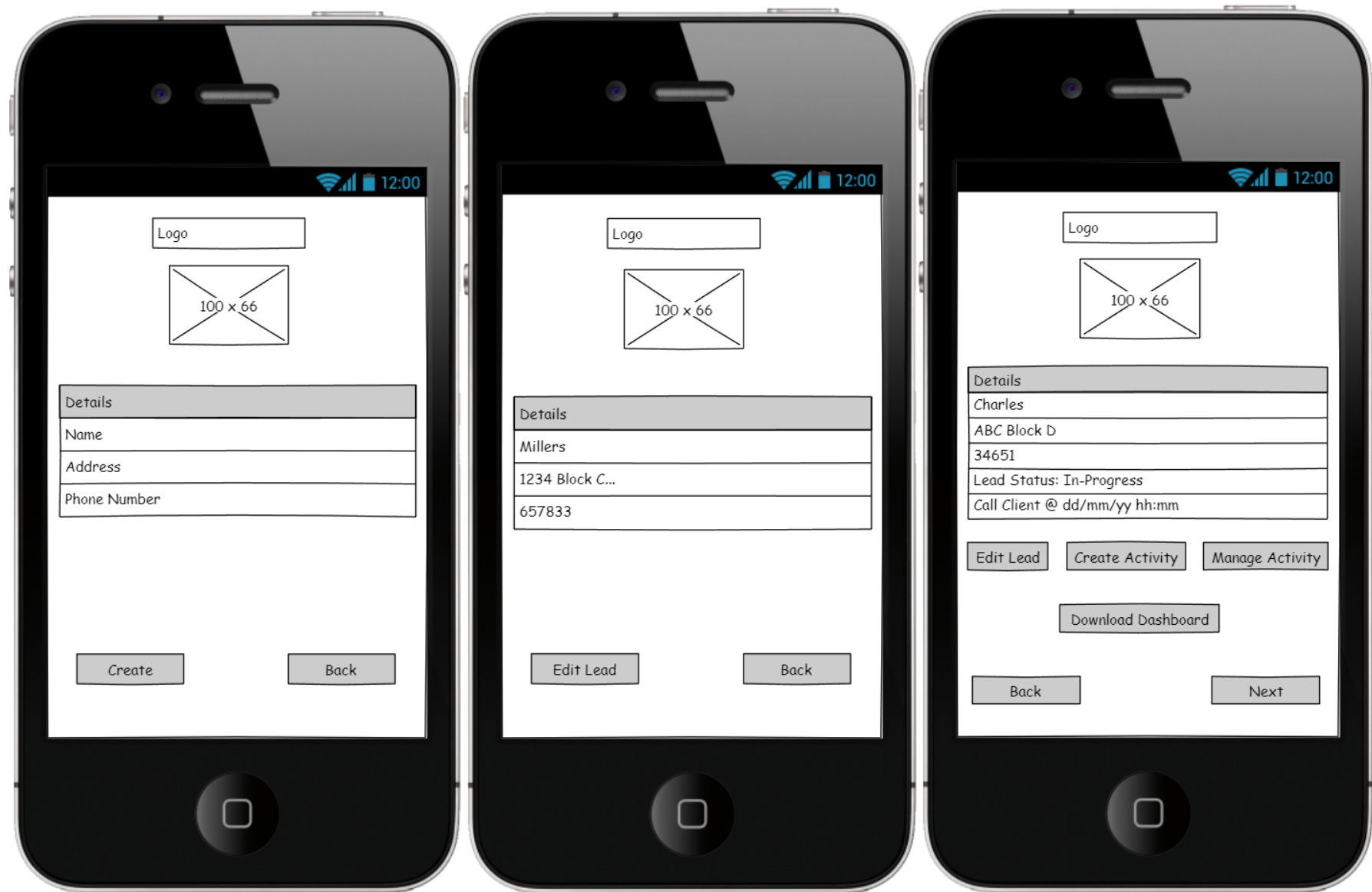
5. Extension Points

- Change Lead Status (Extend): Once the lead is created, the sales rep can change the lead's status (e.g., from "New" to "Qualified" or "Converted") depending on further interactions with the lead.
- Download Leads History Data (Extend): The sales rep may have the option to download historical data for the leads they've created, including tracking information and previous activities associated with the leads.

6. Includes

- Lead Validation: The system validates the entered lead information before creation (checks for required fields, correct data format).
- CRM Sync: The system includes a process that syncs the newly created lead with the CRM system after successful creation.

6.6 Wireframes



(Left to Right): Create Leads, Created Leads, Manage/ Edit Lead Status

6.7 Work on Assigned Leads

1. Brief Description

Sales reps work on leads assigned to them. This involves interacting with the lead, updating the lead information, and progressing through different stages, such as follow-ups, communications, or qualification. They can also modify the status of the lead based on their interactions.

2. Pre-conditions

- Sales rep is logged into the system.
- Sales rep has the necessary permissions to work on assigned leads.
- The lead has been successfully assigned to the sales rep.
- The lead is present in the system and has associated details (e.g., contact info, status).
- The sales rep has up-to-date information about the lead for follow-up.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - The sales rep views the list of assigned leads in the system.
 - The sales rep selects a lead to work on.
 - The sales rep reviews the lead's details (e.g., contact info, status, previous interactions).
 - The sales rep contacts the lead (via phone, email, or other means).
 - After interaction, the sales rep updates the lead with any new information or notes (e.g., updated contact details, lead interest level).
 - The sales rep can schedule a follow-up or set reminders for the next interaction.
 - If the lead's status changes (e.g., from "New" to "Qualified" or "Converted"), the sales rep updates the status accordingly.
 - The sales rep saves the changes and confirms that the lead is updated in the system.
- Alternative Flows:
 - Invalid or Incomplete Information:
 - If the sales rep enters incomplete or invalid information (e.g., wrong contact details or missing notes), the system prompts the user to correct the errors before saving.
 - CRM Sync Failure:
 - If syncing with the CRM fails during the process (e.g., due to a connection issue), the system notifies the sales rep. The lead changes are stored locally until the sync issue is resolved.

4. Post-Conditions

- The lead is updated with the latest information entered by the sales rep.
- The lead's status may be updated (if applicable).
- The lead's progress is tracked and available for reporting.
- The system attempts to sync the updated lead data with the CRM.

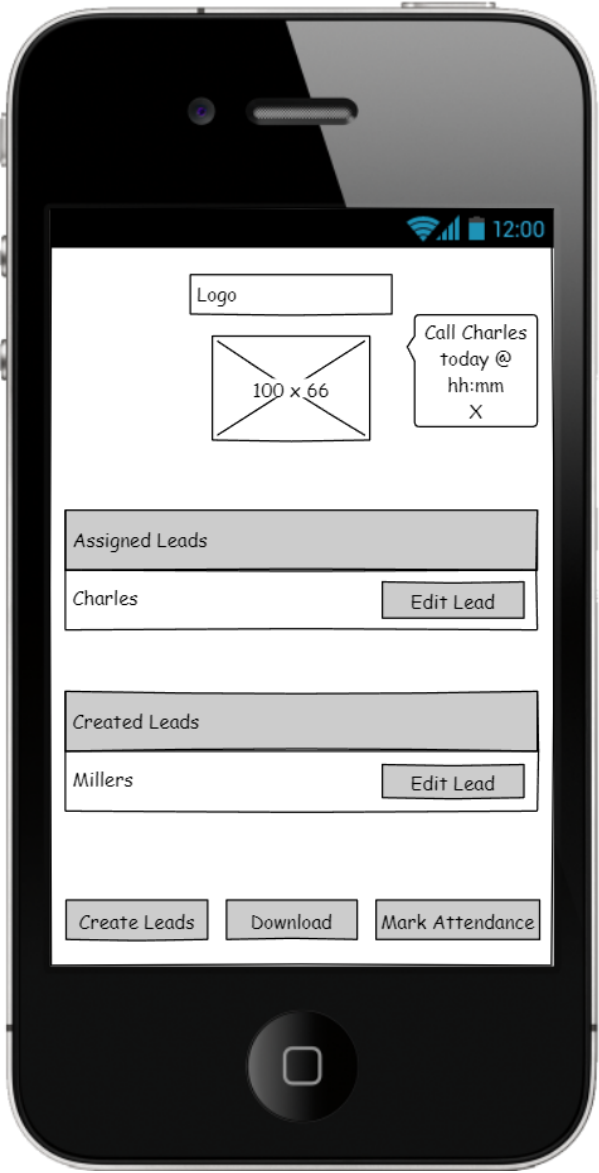
5. Extension Points

- Change Lead Status (Extend): As the sales rep works on the lead, they may update the lead's status (e.g., from "New" to "Qualified," "Follow-up," or "Converted") based on the outcome of their interaction with the lead.

6. Includes

- Lead Review: The system includes a step where the sales rep reviews the lead's history and details before making updates.
- CRM Sync: The system includes a process that syncs the updates made to the lead with the CRM after the sales rep finishes working on the lead.

6.8 Wireframes



Work on Assigned Leads

6.9 Track Leads at an Individual Level – Manager & Reps

1. Brief Description

Sales managers and sales reps can track the status and progress of leads at an individual level. This includes monitoring lead activities, current status, recent interactions, and upcoming tasks to assess the lead's progress and take appropriate actions.

2. Pre-conditions

- Sales rep or sales manager is logged into the system.
- Sales rep or sales manager has the necessary permissions to track lead status.
- The lead data is up-to-date and available in the system.
- The sales rep or manager has access to the individual lead records they are permitted to view.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - Sales rep or sales manager navigates to the "Lead Tracking" section in the system.
 - The user selects an individual lead to track.
 - The system displays detailed information about the lead, including:
 - Lead status (e.g., New, Qualified, Converted)
 - Interaction history (calls, emails, meetings)
 - Upcoming tasks or follow-up reminders
 - Lead owner (sales rep assigned to the lead)
 - The user can filter or search for leads based on criteria like status, assigned rep, or date of last interaction.
 - Sales reps can view and update lead information (e.g., add notes, schedule follow-ups).
 - Sales managers can review progress for leads assigned to their team members.
 - The user can generate and view detailed lead status reports or insights.
- Alternative Flows:
 - No Lead Found:
 - If the lead is not found or does not exist in the system, the system notifies the user and prompts them to try a different search or filter.
 - Incomplete Lead Information:

- If some lead details are missing or incomplete, the system highlights the missing fields or data and prompts the user to update the lead.

4. Post-Conditions

- The lead's tracking information is updated if any new interaction or task is added.
- Sales rep or sales manager has visibility into the latest lead status and activity.
- Lead details are available for further analysis or reporting.

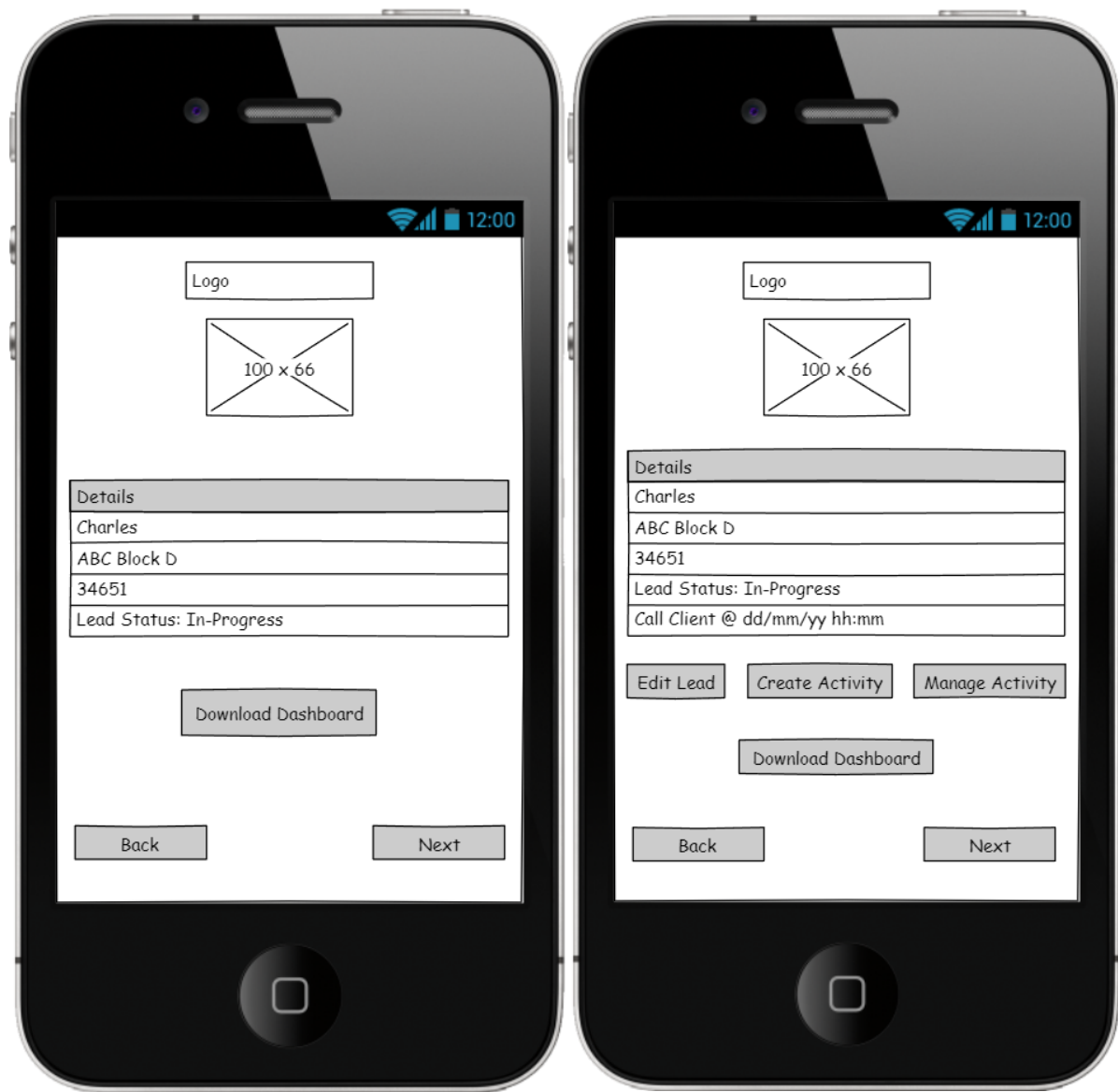
5. Extension Points

- Download Lead Status Dashboard (Extend): The sales rep or sales manager can download a comprehensive dashboard of lead statuses, including visual reports on the progress of leads, categorized by status (e.g., New, Qualified, Converted), upcoming tasks, and interaction history.

6. Includes

- Lead Search & Filter: The system includes functionality for searching and filtering leads based on criteria like status, assigned rep, or recent interactions.
- Lead Activity Tracking: The system includes a process that tracks all lead activities, including interactions, status updates, and follow-up tasks.

6.10 Wireframes



Sales Manager-Tracking at an individual Level, Sales Rep-Tracking at an individual Level

6.11 Track Leads as a Whole – Manager & Reps

1. Brief Description

Sales managers and sales reps track the overall status and progress of all leads within the system. This includes monitoring aggregate lead statuses, overall sales pipeline health, and team performance to identify trends and areas for improvement.

2. Pre-conditions

- Sales rep or sales manager is logged into the system.
- Sales rep or sales manager has the necessary permissions to track lead statuses at an aggregate level.
- Leads are assigned to sales reps and have up-to-date information in the system.
- The system has a mechanism to track the status of all leads in the sales pipeline.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - Sales rep or sales manager navigates to the "Lead Tracking Overview" section in the system.
 - The user views an aggregate view of all leads, showing their statuses (e.g., New, Qualified, Converted) and distribution across different sales stages.
 - The user can filter the leads by criteria such as status, team member, date, etc., to analyze specific subsets of leads.
 - The system provides a summary of overall lead progress, including metrics like:
 - Total number of leads
 - Number of leads in each status category
 - Number of leads assigned to each sales rep
 - The user can identify trends, such as the number of leads progressing to the next stage, leads that need follow-up, or stalled leads.
 - Sales managers can view the performance of their team members, including how many leads each rep is working on and the success rate of those leads.
- Alternative Flows:
 - No Leads in System:
 - If there are no leads in the system, the system displays a message indicating that no leads are available for tracking and suggests creating new leads.
 - Incomplete Data:

- If lead data is incomplete or missing, the system notifies the user and encourages updating the lead information.

4. Post-Conditions

- The overall lead tracking data is updated to reflect any changes in the statuses of individual leads.
- Sales managers or reps have a comprehensive overview of lead progress and pipeline health.
- The system generates reports or insights on lead distribution and performance.

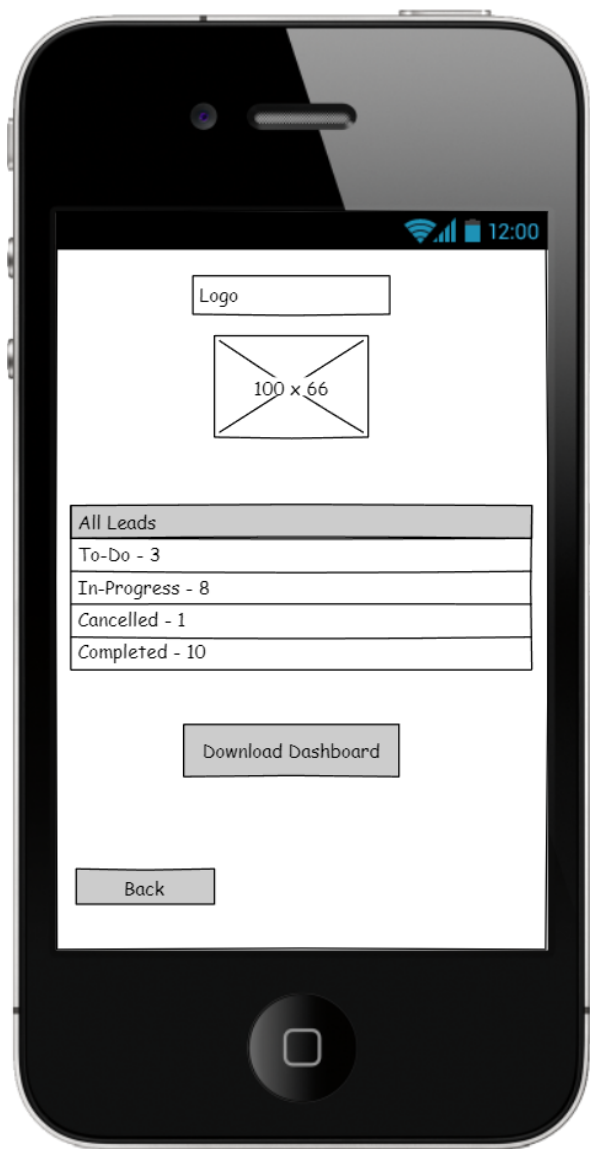
5. Extension Points

- Download Lead Status Dashboard (Extend): The sales rep or sales manager can download a dashboard that provides detailed visual insights into the status distribution of all leads, segmented by status (e.g., New, Qualified, Converted), sales rep, and time frame.
- View Sales Performance Dashboard (Extend): The sales manager can view a dashboard displaying overall sales performance metrics, including:
 - Total leads managed by each sales rep
 - Conversion rates
 - Lead progress through the pipeline
 - Success metrics by sales rep

6. Includes

- Lead Status Overview: The system includes functionality to display a comprehensive overview of all leads in the pipeline, categorized by status.
- Team Performance Overview: The system includes functionality for managers to view team-level performance and lead progress.

6.12 Wireframes



Tracking Leads as a Whole - Sales Manager & Sales Rep

6.13 Create Planned Activities

1. Brief Description

Sales reps create and schedule planned activities for their leads. These activities include follow-ups, meetings, calls, and other actions required to progress leads through the sales pipeline. The activities are linked to specific leads and help sales reps stay organized and track progress.

2. Pre-conditions

- Sales rep is logged into the system.
- Sales rep has the necessary permissions to create planned activities.
- Sales rep has leads assigned to them and has reviewed lead information.
- The sales rep is aware of the next steps or actions required for their leads.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - The sales rep navigates to the "Planned Activities" section in the system.
 - The sales rep selects a lead to associate the planned activity with.
 - The sales rep defines the type of activity (e.g., phone call, meeting, follow-up, email).
 - The sales rep sets a date and time for the activity.
 - The sales rep provides additional details for the activity (e.g., agenda for the meeting, goals for the follow-up, specific points to cover).
 - The system confirms the creation of the planned activity and associates it with the lead.
 - The sales rep can view all upcoming planned activities and edit them if needed.
- Alternative Flows:
 - Incomplete Activity Information:
 - If the sales rep leaves essential details (e.g., time, activity type) empty, the system prompts the user to complete the required fields before proceeding.
 - Scheduling Conflicts:
 - If the planned activity conflicts with an existing activity (e.g., overlapping time), the system notifies the sales rep and allows them to resolve the conflict (e.g., by changing the time).

4. Post-Conditions

- The planned activity is created and associated with the selected lead.
- The activity appears in the sales rep's activity schedule and is tracked for follow-up.
- The system updates the lead's activity history with the planned activity.

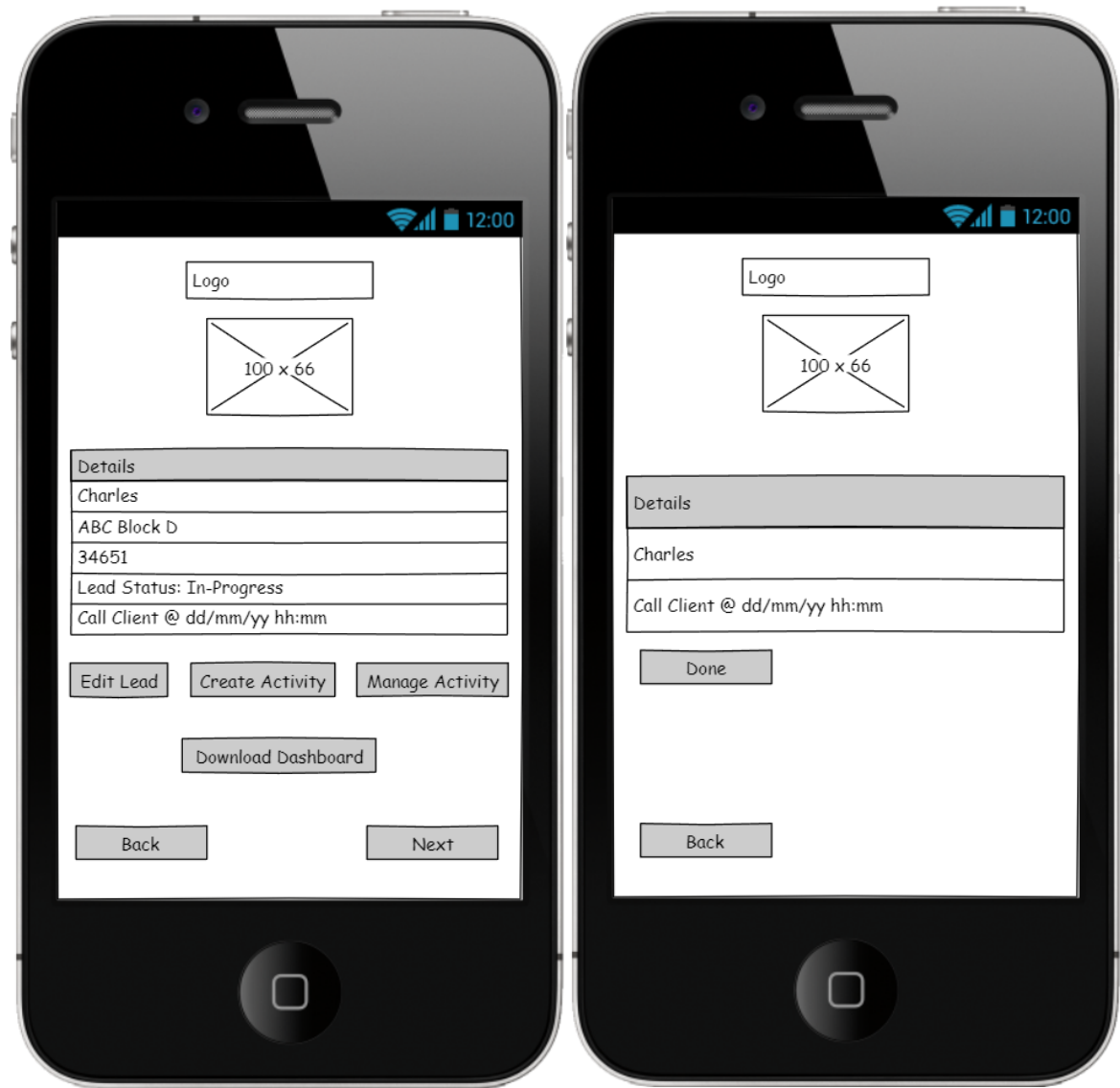
5. Extension Points

- Manage or Change Planned Activities (Extend): If the sales rep needs to modify or cancel a planned activity (e.g., due to scheduling conflicts or changes in priorities), they can access the option to manage or change the activity details (e.g., change date/time, update activity type).

6. Includes

- Activity Scheduling: The system includes functionality for scheduling and associating activities with specific leads.
- Activity Reminder: The system includes a reminder feature to notify the sales rep of upcoming activities based on their scheduled times.

6.14 Wireframes



Create Activity (Available on Manage/ Edit Lead Status Screen), Created Activity

6.15 Mark Attendance

1. Brief Description

Sales reps mark their attendance for various activities such as meetings, training sessions, or any other company-related events. This helps track their participation and ensures accurate records for reporting and analysis.

2. Pre-conditions

- Sales rep is logged into the system.
- The system has an active attendance module or event schedule (e.g., meeting, training session).
- The sales rep is listed as a participant in the event.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - The sales rep navigates to the "Attendance" section in the system.
 - The sales rep selects the specific event for which they want to mark attendance (e.g., meeting, training).
 - The system displays a list of participants and provides options to mark attendance.
 - The sales rep clicks on "Mark Attendance" next to their name.
 - The system confirms that attendance has been successfully recorded.
 - The attendance is updated in the system, and the event organizer is notified of the rep's participation.
- Alternative Flows:
 - No Event Available:
 - If no event is available for attendance marking, the system notifies the user and suggests checking for upcoming events.
 - Duplicate Attendance Marking:
 - If the sales rep attempts to mark attendance for the same event more than once, the system prevents duplicate entries and notifies the user.

4. Post-Conditions

- The attendance record is updated for the sales rep for the selected event.
- The event organizer has access to the updated attendance list.
- Attendance data is available for reporting purposes.

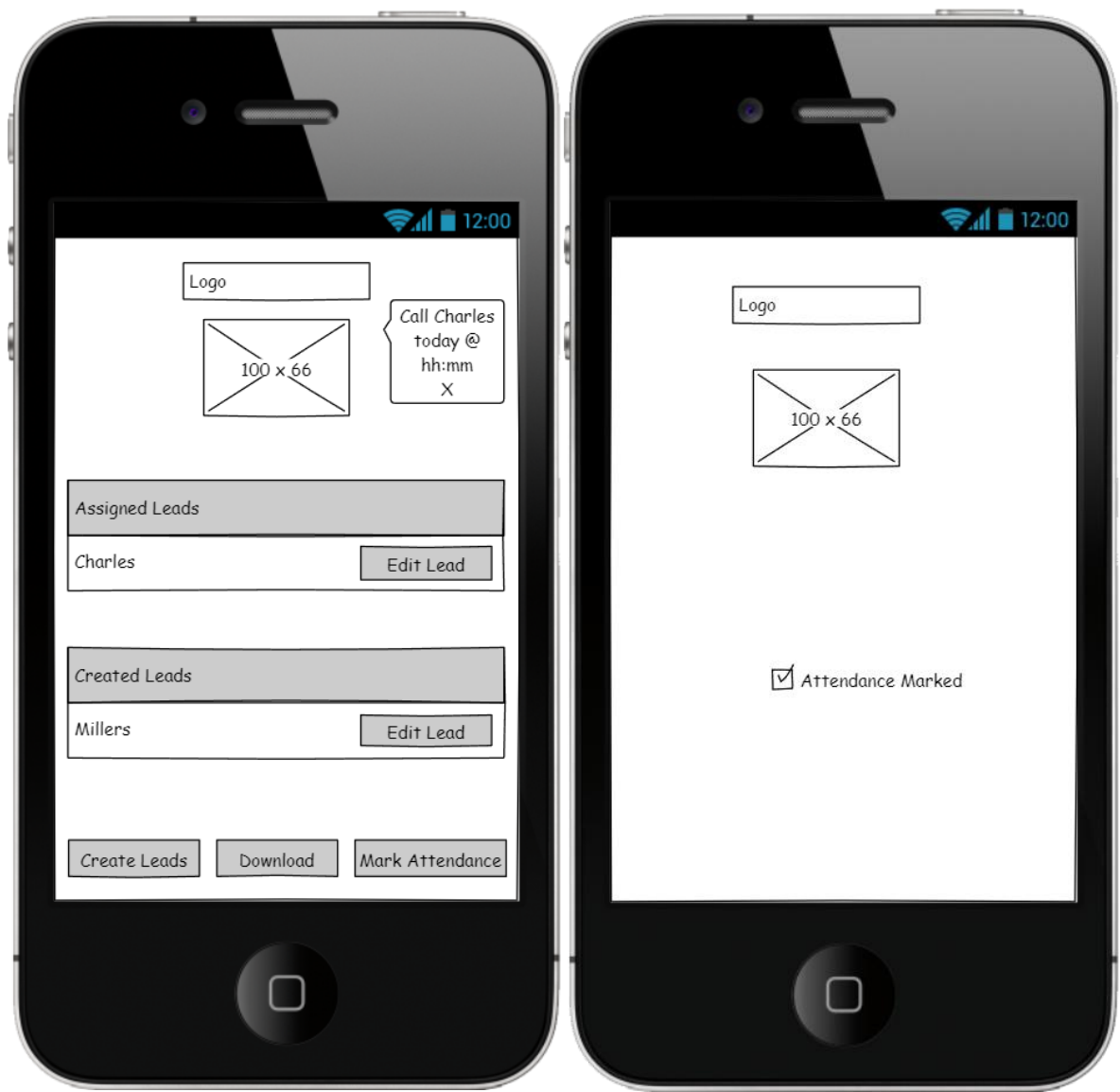
5. Extension Points

- None

6. Includes

- Event List Display: The system displays a list of upcoming events for which attendance can be marked.

6.16 Wireframes



Mark Attendance (Available on Sales Rep Work Assigned Screen), Attendance Marked

6.17 Track Sales Rep Attendance

1. Brief Description

Sales managers monitor and track the attendance of their sales reps for various activities such as meetings, training sessions, and other events. This helps ensure that all sales reps are participating in required activities and allows the manager to address any attendance issues.

2. Pre-conditions

- Sales manager is logged into the system.
- The sales manager has the necessary permissions to access attendance records for their team.
- Sales reps are assigned to the sales manager and their attendance records are available in the system.
- There are ongoing or completed events for which attendance can be tracked.

3. Flow of Events

- Basic Flow / Successful Scenario:
 - The sales manager navigates to the "Sales Rep Attendance" section in the system.
 - The sales manager selects the specific event or activity (e.g., meeting, training session) to track attendance for.
 - The system displays a list of all sales reps assigned to the sales manager and their attendance status for the event.
 - The sales manager can view who attended and who was absent, along with any notes or justifications for absence (if provided).
 - The sales manager can filter attendance by different parameters such as date, event type, or rep.
 - The system allows the manager to download or generate reports on the attendance data for further analysis or reporting.
- Alternative Flows:
 - No Attendance Records Available:
 - If no attendance data is available for the selected event, the system notifies the manager and suggests checking if the event attendance has been updated.
 - Missing Attendance Information:
 - If any attendance data is missing or incomplete, the system alerts the manager and requests further action.

4. Post-Conditions

- The sales manager has an up-to-date view of attendance for their team members.
- The system generates or updates any necessary attendance reports.
- Attendance data is available for performance or compliance tracking.

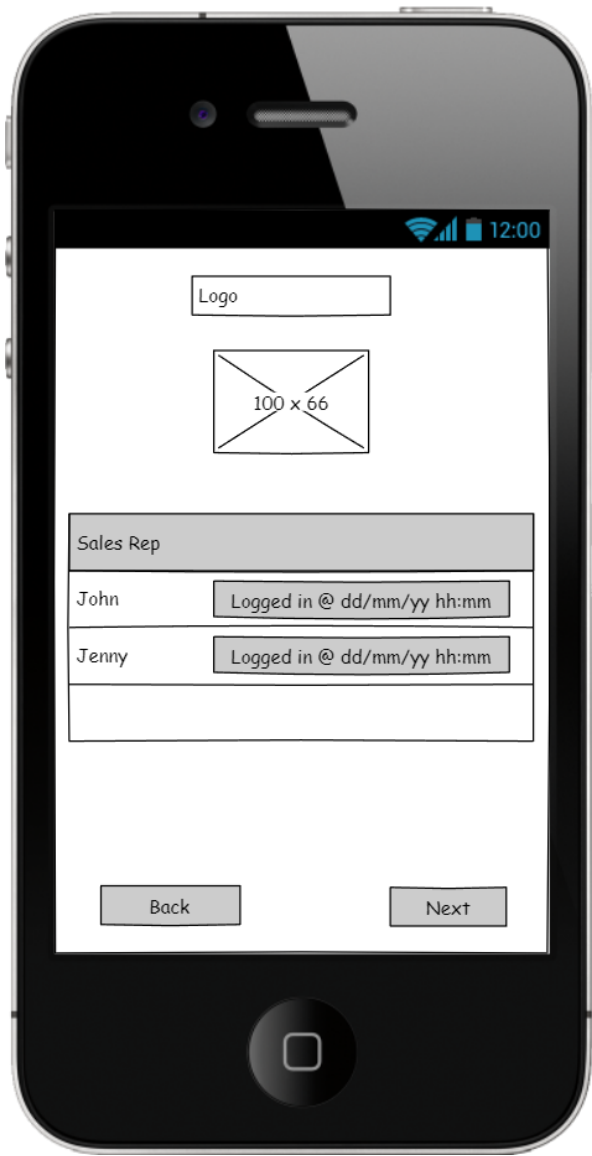
5. Extension Points

- None

6. Includes

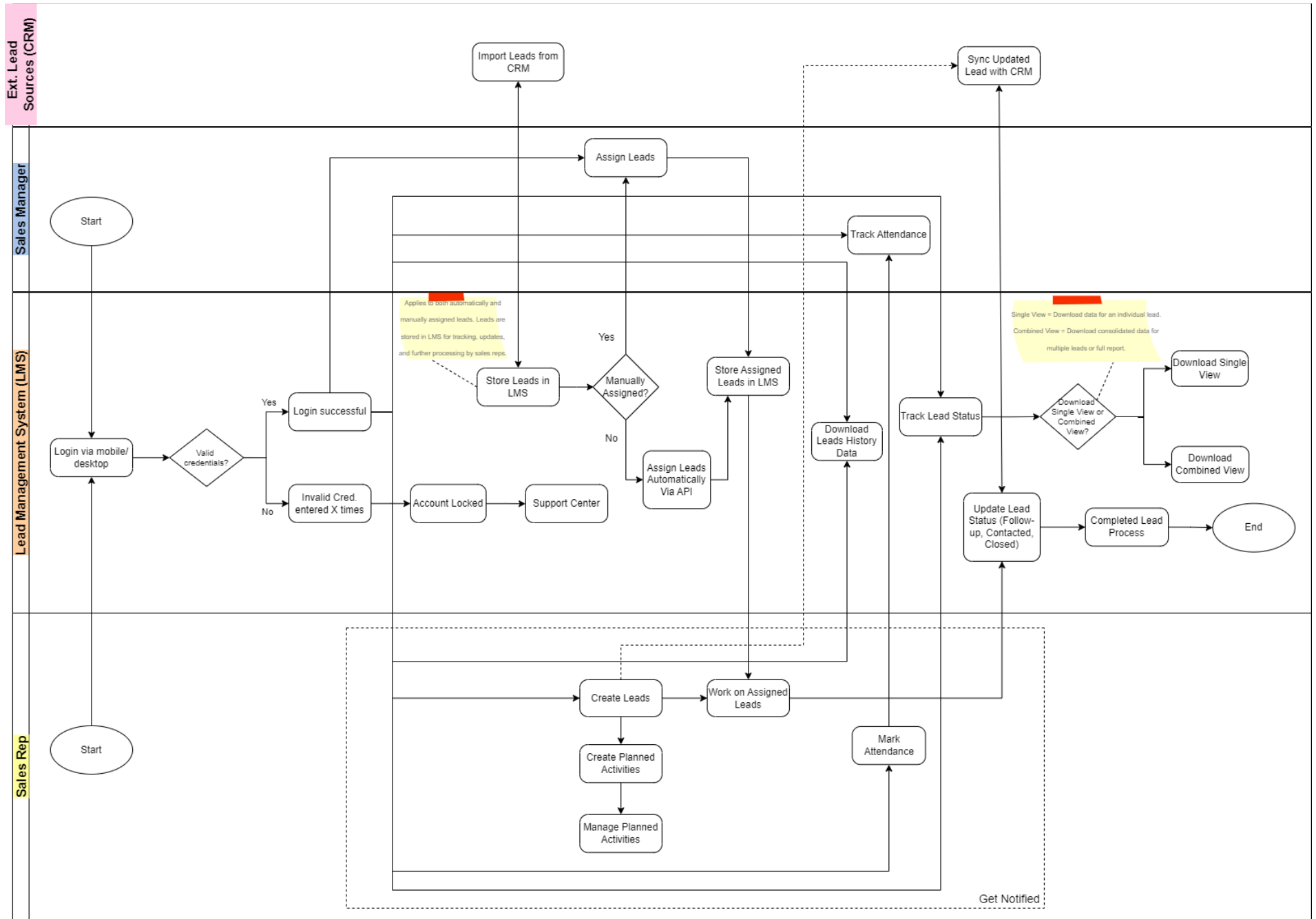
- Attendance Overview: The system includes functionality to display a summary of sales rep attendance for each event.
- Report Generation: The system includes functionality to generate or download attendance reports for analysis and record-keeping.

6.18 Wireframes



Track Attendance (Sales Manager)

7. Process Flow Diagram



8. Conclusion

This case study outlines a structured lead management solution for V-Cosmetics, addressing key challenges faced by sales managers and representatives. By implementing a centralized system with lead tracking, real-time updates, performance analytics, and CRM integration, the solution enhances efficiency, visibility, and decision-making within the sales process.

With a strong focus on scalability, security, and usability, this system ensures seamless operations while supporting V-Cosmetics' long-term growth in the cosmetics industry. The solution design, including business requirements, user stories, and use case modeling, provides a clear roadmap for successful implementation.

For further details, refer to the [GitHub repository](#).