Deal Cycle Business Development

Screening — 01

Pre-qualifying Deals and uploading it to the CRM

Estimating — 02

Estimators get the files and prepares a quote

Nurture — 03

Business Development builds relationship and do follow-up

Negotiation — 04

Business Development negotiates until client signs the contract

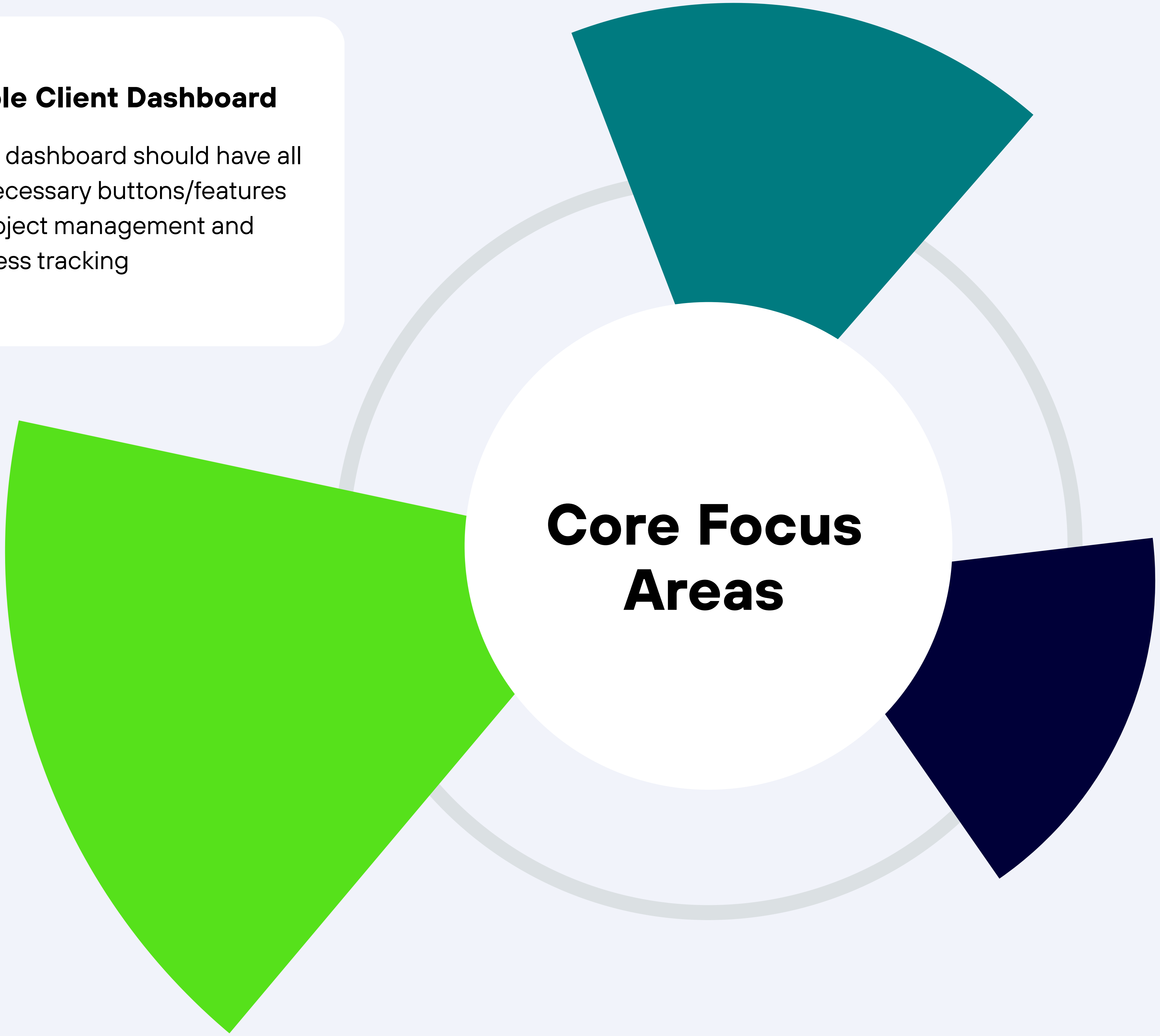
Project Turnover — 05

Once contract is signed, turn-over to project/operations

01

Simple Client Dashboard

Client dashboard should have all the necessary buttons/features for project management and progress tracking



02

Analytics/Reporting

Robust reporting and analytics structure and view.

03

Integration and Automation

Automation and AI-geared system.

Project Timeline Path

Five sequential phases mark project progress milestones

Phase 1

Define Vision

Set clear project objectives and long-term outcomes

Phase 2

Outline Scope

Determine deliverables, tasks, and resource allocation

Phase 3

Build Increment

Develop new features in small, manageable and efficient stages.

Phase 4

Test Results

Validate deliverables against quality benchmarks and requirements

Phase 5

Release Product

Deliver the final version for immediate use or for valuable customer feedback.

Essential Elements (Monday)

User Account

01 System that requires log in from staff that will serve as check-in, check-out.

Pipeline Structure

02 Duplicate pipeline structure from current CRM; New Request, Engaged, Estimate in Progress, Estimate Sent, Follow-up, Negotiation, Closed Won, Closed Lost (with Sub Reason), Declined to Bid (with Sub Reason).

Client Dashboard

03 Important buttons: call, email (enable macro templates), site-visit schedule, invoice/payments, attachments.

Features: user logs; call log, email log, activity log.