





Transforming Lead Management Challenges into Opportunities

Small businesses face significant challenges in managing leads effectively:

- Manual data entry errors leading to lost opportunities.
- Scattered lead sources across manual forms, documents, and various channels.
- Lack of centralized tracking for lead status and customer interactions.
- Inconsistent follow-up processes resulting in poor conversion rates.
- No automated workflow management for lead progression.

The absence of a unified system creates gaps in customer relationship management, ultimately impacting business growth and revenue potential.



Mini-CRM System

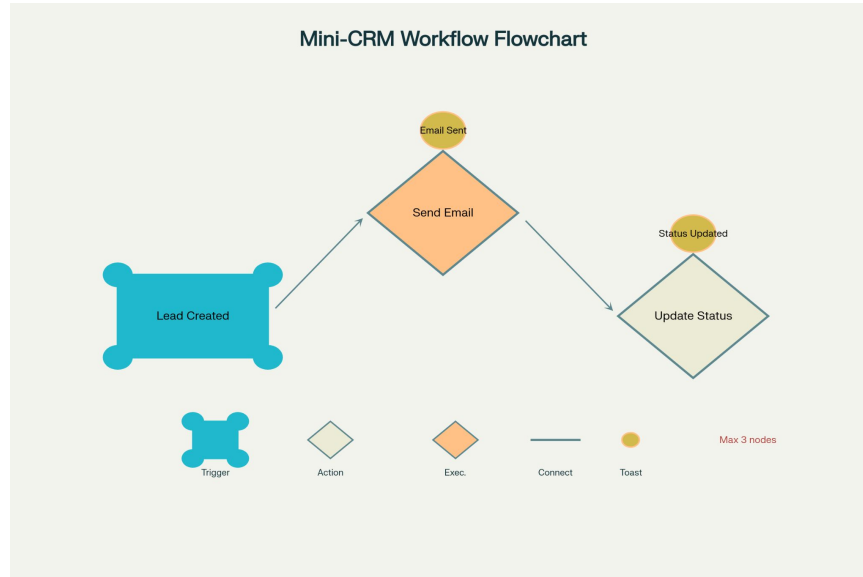
Mini-CRM Web App built in React + Tailwind, backed by AI
Lead Entry

- Manual: via HTML form (name, email, phone)
- Document: drag-and-drop PDF/PNG → AI extraction for name/email

AI Agent auto-creates leads: `{name, email, phone:"N/A", status:"New", source}`
Dashboard

- Table view with New/Contacted filters
- Buttons for delete or status toggle

Workflow





Impact & Benefits

Efficiency gains

- Fast intake: manual + PDF/PNG extraction
- Real-time AI suggestions reduce friction in follow-up

Process clarity

- Visual workflow ensures consistent automation
- Logs + toasts increase user confidence in actions taken

Scalable demo

- Architecture supports adding new actions (SMS, CRM updates)
- UI layers separated for future enhancements



Team and Contributions

Frontend (React + Tailwind):

- Form, upload, dashboard, modal, React Flow canvas

Backend/Scripts:

- AI extraction logic, mock LLM handler
- State management for leads & workflow

UX/UI Design:

- Responsive UI layout, form UX, modal/chat interface
- Styled nodes and toasts for intuitive user flow

Testing & Integration:

- Basic unit tests on lead creation, mock LLM responses, workflow execution