

Product Requirements Document (PRD)

Prepared by: Subham Mukherjee (msubham2059@gmail.com) -

Title:

Ufaber – Sales Performance Indicators

Stakeholders:

- Vice President of Marketing
- Vice President of Engineering
- Director of Content
- Director of Business Development
- Sales Manager

Status

uFaber is one of the fastest growing Edutech company's in India, specializing in personalized training with latest technologies and high quality content. ... Our aim is educational inclusion- removing geographical boundaries which restrict the access to quality education and training.

Background:

Context

Real school is an android application that offers an online workshop for kids between age group 5-12. Parents can create their kid's profile, book a few workshops for free and then upgrade to buy. The workshop is sold in the telecalling process through counselling since it is a high priced product and most customers' buys it using EMI option.

Product

A lead management dashboard for a Sales Manager who tracks on a daily level new leads their progress in using the app, whether they are hot or cold, their conversion status, their conversation history with respective telecalling agents, bulk emails, SMS, notifications, giving extra free classes, giving discounts

Competitors

SuperProfs:

SuperProfs is the biggest community of Professors worldwide for Online CA CS CMA GATE Exam. Video lectures + tests + notes. Better than classrooms programs! Flexible learning at home. Affordable & Flexible Fee. Works on Low Bandwidth. Interactive Video Classes.

Suphalaam:

Suphalaam is a technology company based in Bengaluru, India serving both consumer and B2B markets. In the B2B vertical, Suphalaam provides businesses a suite of web services called Suphalaam Web Services (SWS) just along the lines of Amazon Web Services. SWS helps businesses scale up their online operations fast. Further details on SWS are here. In the consumer space, Suphalaam is a leader in the area of education technology.

NeoStencil:

NeoStencil solves the basic yet major problem of accessibility to education in India. Our vision is to make quality education available, accessible, and affordable across the country. We believe that the access to the best resources shouldn't be limited only to those who reside in metropolitan cities but also to those who quit their jobs, relocate and live in harsh conditions to secure their dream job.

Metrics

As Ufaber don't have any dashboard visualization and tracker for all the sales function so the quantitative data that are generating every day at different stages of the customer and the company journey, those are not in any mode of integration and not ready to measure performance.

The company had raised seed funding of Rs 3 crore from friends and family between 2013 to 2015. It has already enrolled more than 10 lakh registered learners, over 30,000 paid customers and 1,200 trainers. It posted Rs 20 crore revenues in FY19.

Users

This feature will help sales and marketing team to keep track of the sales data, everyday leads generation, customer retention status, and everyday growth statistics, recent leads status (converted/not converted), hot leads or cold leads, bulk emails download, conversation history with respective telecalling agents, discounts and extra classes.

Current sales manager use this matrices and kpi's to get a holistic insight of current happenings in sales and its effect in company's growth and make quantitative and qualitative decision based on these attributes.

All the kpis till now has been maintained in simple excel spreadsheet which is time consuming for managers and decision makers to first find out and open the exact tab and then analyzing the dashboard.

Projected Phases

Provide four types of dashboard on the front yearly growth chart, customer retention status, conversion status and daily growth chart, with this total revenue, total sales and total income on top of these.

Separate analysis of the leads along with agents.

Coordinate with sales and engineering teams to ensure that stakeholder can able to get a glimpse of current happenings in sales and how much it contribute towards achieving the ultimate goal.

By congregating all the data in a centralized platform it becomes very convenient to the sales marketing and operation team.

Success Metrics

Measuring success with initially involve benchmarking adoption, engagement, and deal closure rates for specific subscription packages against current per-country completion rates for the packages as they are before this project.

For each target operation:

Top 10 most recent leads integrated with the dashboard for time saving new automated data population feature is there where user can fill all the input just by importing the excel file.

Fast decision and quick response against all the odds.

Leads history with conversion status and agent associated with the specific leads.

Downloading bulk email and sms and the downloading of the dashboard as a pdf in local machine.

Overall success metrics:

Increased efficiency in decision making process and transferring it towards achieving enterprise goals.

Increased number of leads.

Increased the rate of conversion and revenue generation.

Increased engagement by subscribers from various demographics those whose children belongs to 3 to 8 years of age.

Epics

In Scope

As a sales manager, I want to make decision faster, so that the operation take less time.

As a decision maker, I want to analyze what kind of leads we should focus on, so that we could move towards better success rates and better customer retention.

As a manager, I want to take care of employee's performance, so that they can always be motivated and contribute to the organization goals.

Out of Scope

As someone who travels a lot for sales purposes can be able quickly go through the status by just logging in to the account.

Requirements

Dashboard for total sales, revenue, and total views.

Sale growth, customer, conversion status and daily sales and growth rate.

Latest leads with all the details such as contacts, localities etc.

Downloading of all reports in pdf format.

Setting button and notification with admin name appeared on the top right corner.

Company logo appear on the top left corner beside the list button.

Bulk information can be uploaded by importing excel file.

Leads history with Agent.

Examples:

From home page -> login / sign in page -> user ID & password

From sidebar calendar -> event view

Import excel -> fill up fields

From sidebar history -> Sales history landing page

Design

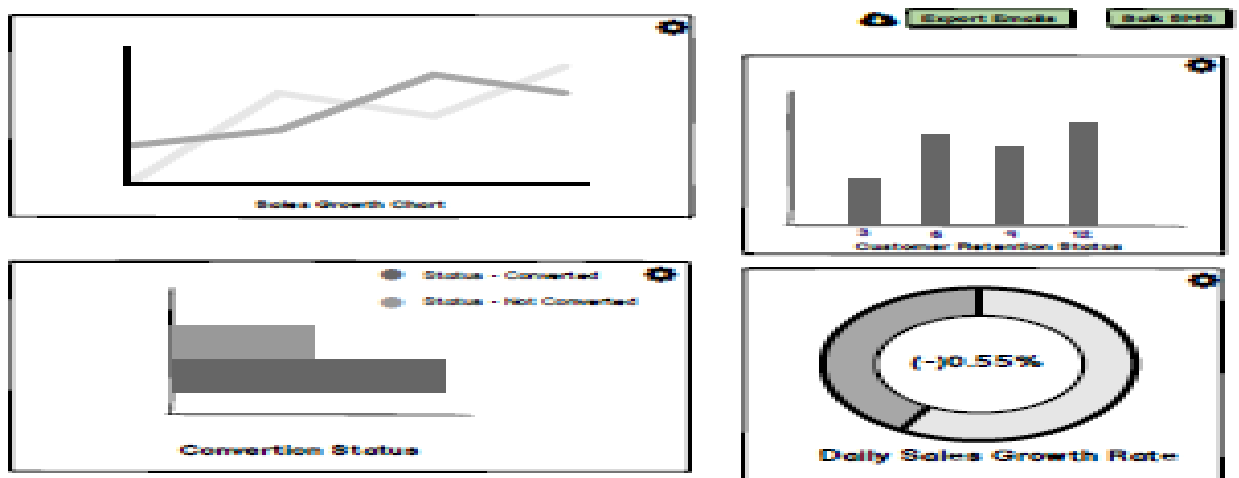
Sales Landing Page

This landing page has features full with dashboard, total sales, views and income, exporting bulk email and sms in pdf or excel format.




Sign Up

Features including all the dashboard that actually helps sales team to increase the sales operation.





Leads Chart:

Integrated view of all the latest leads with attributes such as contact, place, date, discount and agent associated with a particular lead. Bulk upload of latest opportunities.






Leads Name	Status	Email ID	phone	Date	Locat	Agent	Classes/Ex	discou
Giuseppe	Converted	kfs@gmail.co	9854256	05/05/20	Kolkata	Akhil	5	10%
Marco Botton	Not Conver	anvk@gmail.	9854575	03/05/20	Delhi	Aniru	4	NA
Harish	Converted	nab@gmail.co	985315115	03/05/20	Bangalo	Vikas	3	20%
Valerie Liberty	Converted	njob@gmail.	95644616	05/05/20	Mumbai	Akash	2	30%


 Converted | Hot  Not Converted | Cold

Key Indexes:

Status of total sales, Revenue generation and total views with organization logo on top left and notification and admin name and designation on top right corner.



Sandeep
Sales Manager



Total Sales
12358

Total views
36358

Total Income
\$ 2179000

Sales History:


Holistic view of sales history with search bar where manager can search specific lead via name, mail, phone number and place, even agent name can be searched in order to know the leads status associated with a particular agent.

< Back

Sales History

Agent Sales History

Nam ▲	Lead	Lead	phone	mail	place	Agent
Aaradh	Converted	Hot ●	2224	illa@me	Kolkata	Aaaqil ▾
Adah	Converted	Hot ●	22241356	wildfire@sbcglobal.n	Mumbai	Aarma ▾
Adhira	Not	NA ●	22236718	bmidd@icloud.comD	Aaban	▾
Alisha	Converted	Cold ●	22263263	amcuri@live.com	Bengalu	Aabdar ▾
Amoli	Converted	Hot ●	51143339	sacraver@outlook.c	Chennai	Aabdeen ▾
Anaish	Not	NA ●	2226494	gfxguy@live.com	Gujrat	Aabharan
Ananya	Not	na ●	112461802	jshearer@mac.com	Kolkata	Aabhas
Anika	Not	NA ●	80232207	moonlapse@optonlin	Mumbai	Aabhass
Anushk	Converted	Hot ●	22220133	seurat@mac.com	Delhi	Aabhavann

 View More

Timeline & Release Planning

Phase 0: Validation

Identify most requested features by stakeholders whose primary concern is getting to know the crux of sale and analytics, with sale revenue and views and no. of sale.

Consider the four most popular indices such as sales growth chart(annually), customer retention status, daily sales growth status, conversion status target children comes under 4-10 years from international and within India as well.

The report can be downloaded in a pdf format as well.

Collect metrics and check engagement: specific function clicks, course chapter completion, course completion, course dropout rate.

Phases 1 - 4: Stepped Phases

For each classes, identify key targets for marketing campaigns.

Add AI ML features which will give insight about the future sales and success probability.

Adjust based on metrics from A/B tests, customer interviews, and surveys.

Release Phases

Announcements on LinkedIn, Facebook, and Twitter in target languages for target market, including sponsoring posts.

Craft HTML email campaign material to advice stake holders with service preferences selected about newly created features.

Rollout and A/B Testing

Drive 10% search engine cohort to multiple landing pages to test preferences for conversion potential.

Test new UI components on sales and sales history pages to ensure comprehensibility, both in sales and marketing.

Strategize to gradually increase cohort over three months, rolling in landing experience to sales executive as well.

Checklists

- Identify target markets per subscription per age.
- Best to target most impactful indicators first.
- Identify 200 most retained and analyze their behavior.
- Identify using Survey Monkey and integrate it with dashboard.
- Identify all the agents those who able to convert most leads.
- Intelligent dashboard with integrating customer responses.
- Incorporate alert via mail or message to the respective stakeholder by analyzing the risk associated with it.
- A/B test placement for each sales.
- Optimizely or UserTesting
- Build risk prediction with suggestion feature to mitigate the risk.
- Test audience engagement with Optimizely.
- Open subtitle toggle option to all customers globally for each language.
- Repeat 2 - 4 with next 20, 50, and 100 leads, if possible.