**BASIC LEADS MANAGEMENT SYSTEM**

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**Phase 1: Problem Understanding & Industry Analysis**

This phase is all about understanding the project's core problem and the industry it operates in.

**Problem Statement:**

Many small and medium-sized businesses struggle to efficiently manage their customer leads. Leads are often collected through phone calls, emails, and website forms, but without a structured system, important information gets lost or overlooked. Sales representatives find it difficult to track the status of each lead, assign leads based on availability, and ensure timely follow-ups. This leads to missed opportunities, lower conversion rates, and reduced customer satisfaction.

The business needs a simple and effective solution to store lead information in one place, assign leads to the right people, track interactions, and monitor performance through reports. A Salesforce-based Lead Management System will help streamline lead handling, improve communication, and enhance overall sales effectiveness.

**Requirement Gathering**

This step involves collecting information about what the system needs to do. For a

Leads Management System, this would include:

**Automating lead capture:** Capturing leads from various sources like web forms and social media.

**Lead assignment**: Automatically assigning leads to sales agents, potentially based on territory.

**Lead qualification**: Qualifying leads based on an "interest score".

**Tracking and management:** Managing properties, visit schedules, and customer interest and purchase history.

**Real-time reporting**: Creating real-time dashboards for management to track sales performance, lead funnel, and agent activity.

**Stakeholder Analysis**

This involves identifying the key people involved in the project and their roles. For this project, the target users are

Sales Agents, Property Managers, and Prospective Buyers.

**Business Process Mapping**

This involves documenting how the business currently operates. For the "Smart Property Portal," the current process is described as:

Receiving thousands of inquiries from multiple sources like the company website, offline listings, and social media.

Experiencing slow lead follow-up and manual tracking of property visits.

Sales agents being unable to effectively prioritize high-intent buyers.

Industry-specific Use Case Analysis

This step focuses on how the system will be used within the real estate industry. The provided use cases for the project include:

**Lead Managemen**t: Automatically capturing and assigning leads and qualifying them based on their interest.

**Property Management:** Maintaining an inventory of properties and tracking visit schedules.

**Visit Scheduling:** Allowing agents to schedule visits and send confirmations to customers.

**Deal Closure**: Updating deal status and capturing important details like booking amounts and documents.

**Reporting**: Providing dashboards for management to view sales performance and track agent activity.

**AppExchange Exploration**

This phase includes exploring pre-built applications on the Salesforce AppExchange. This could help find existing solutions for lead management, visit scheduling, or reporting that can be integrated or customized, rather than building everything from scratch.