Scope of Work: Lead Management CRM Development

1. Project Overview: Develop a comprehensive lead management Customer Relationship Management (CRM) system to streamline lead capturing, tracking, and conversion processes for the organization. The CRM will serve as a centralized platform for managing and nurturing leads throughout the sales cycle.

2. Objectives:
   a. Design and develop a user-friendly lead management CRM system tailored to the organization's specific requirements.
   b. Provide a secure and scalable CRM solution capable of handling a large volume of leads. c. Enable efficient lead capturing, tracking, and conversion processes to enhance sales productivity.
   d. Integrate the CRM with existing systems, such as email marketing tools and customer databases, to ensure seamless data flow.
   e. Implement robust reporting and analytics functionalities to generate insights on lead performance and sales metrics.
   f. Ensure data privacy and compliance with relevant data protection regulations.

Defiining a customer :

A lead can be added by a user (New Lead)

Name
Phone number
Debt Level
Nos of creditors

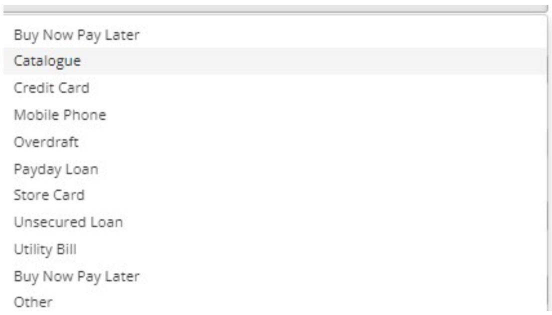
Title : Mr / Miss/ Mrs
Partners Name
Address: if we can use api for UK address ex: https://postcodes.io/
Adding Previous address (with duration) month and year
Alternate number
Email Address
DOB (DD/MM/YYYY)
Marital Status: Single /married / living with a partner/separated / Divorced
Dependants: **Add dependents button** (option to choose age of every dependent
Employed/ self employed / part time employed / employed with benefits/ benefits only /retired
Residential Status: Pvt Tenant , council tenant , housing association ,home owner, living with friends , Living with family
Otther Info (Comment)

Adding Debts

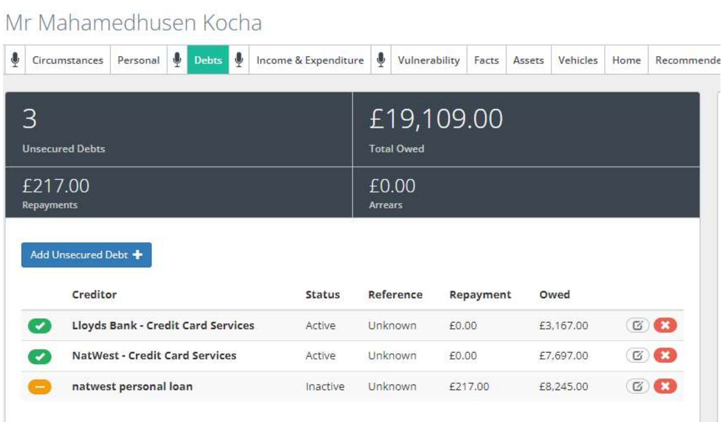
Debt field attributes :

- Name of Creditor :
- Type of debt
- Amount
- Monthly payment (Prefilled with = 0),
- Falling behind (yes or no)

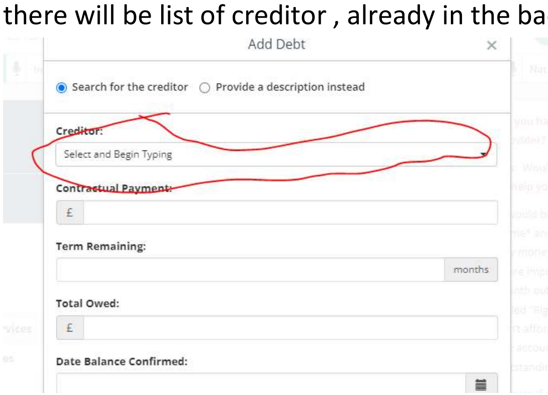
Type of debt : can be dropdown : can add more category on back end



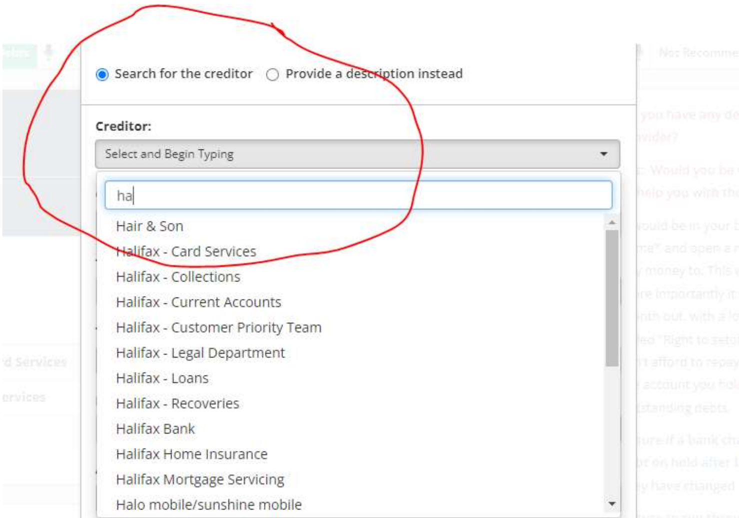
Example :



there will be list of creditor , already in the back end , Also we can add more creditors to choose on the backend.



searchable by initials .



Nos of creditors , Total Debts , Monthly payment should be shown as summary of the debts .

Income and Expenditure :

All income and expenditure are calculated monthly .

So lets say if the any expense or income is input we have to calculate it on monthly for income and expenditure .

Example :

Income head	**Amount**	**weekly / fortnightly/ 4-weekly / Monthly /quarterly / Annually/ Six monthly)**	**Monthly amount**	**formula**
Salary	400	weekly	1733.33	weekly amount X 52 /12
ESA	250	Fortnightly(14 days)	541.67	weekly amount X 52 /24
DLA	350	4 weekly	379.17	weekly amount X 52 /48
Universal credit	560	monthly	560.00	
		TOTAL Monthly income	3214.17	

Considering : 1 year= 52 weeks

month = 52weeks/12

Income Sources :
Income
Salary or wages (take home)
Partner salary or wages (take home)
Other earning (including self employment)
Benefits
Universal Credit
Jobseeker's Allowance (income based)
Jobseeker's Allowance (contribution based)
Income Support
Working Tax Credit
Child Tax Credit
Child Benefit
Employment and Support Allowance
Disability Benefit
Carer's Allowance
Local Housing Allowance / Housing Benefit
Council Tax Support
Other benefits/tac credits (eg maternity allowance)
Pensions
State pensions
Private or work pensions
Pension credit
Other pensions
Other income
Maintenance or child support
Boarders or lodgers
Non-dependant's contribution
Student loans and grants
Other income

Expenditure

Home and Contents:
Rent
Ground Rent / Service Charge / Factor Fees
Mortgage
Mortgage Endowment
Secured Loans
Council Tax / Rates (including water rates for NI)
Applicance and Furniture Rental
TV Licence
Other Costs
Utilities:
Gas
Electricity
Other Costs (Coal, Oil, Calgor Gas etc)
Other Expenditure
Water:
Water Supply
Water Waste
Care and Health Costs:
Childcare Costs
Adult-Care Costs
Child Maintenance or Child Support
Prescriptions / Medicines
Dentistry / Opticians
Other Costs
Transport and Travel:
Public Transport (Work, School, Shopping)
Hire Purchase / Conditional Sale
Car Insurance
Road Tax
MOT / Ongoing Maintenance
Breakdown Cover
Fuel / Parking / Toll Road Charges
Other Costs (Including Taxi's)

School Costs:
School Uniform
After-School Club and School Trips
Other Costs

Pensions and Insurances:
Pension Payments
Life Insurance
Mortgage Payment Protection Insurance
Building and Contents Insurance
Health Insurance (Medical or Accident)
Other Costs

Professional Costs:
Professional Courses
Union Fees
Professional Fees
Other Costs

Other Essential Costs:
Other 1

Communications and Leisure
Home Phone / Internet / Cable (including film subscriptions)
Mobile Phone
Hobbies / Leisure / Sport (socialising, eating out etc)
Gifts (birthdays / festivals / charity)
Pocket Money
Newspapers / Magazines / Stationery / Postage
Other Costs

Food and Housekeeping:
Groceries (food, pet food, non-alcoholic drinks, cleaning)
Nappies / Baby Items
School Meals / Meals at Work
Laundry / Cleaning
Alcohol
Smoking Products
Vet Bills / Pet Insurance

House Repairs / Maintenance
Other Costs
Personal Costs:
Clothing / Foorwear
Hairdressing
Toiletries
Other Costs

Status

Every Lead has a status: Y means this disposition is available to the Employee

	Agent	Closer	Team lead	Manager	Admin
• **New Lead**	y	y	y	y	y
• **Call Back**	y	y	y	y	y
• **Not responding**	y	y	y	y	y
• **Transferred IVA**	y	y	y	y	y
• **Transferred DMP**	y	y	y	y	y
• **Transferred Debt Charity**	y	y	y	y	y
• **Pack out**	N	y	y	y	y
• **Pack in**	N	N	y	y	y
• **SIP Fixed**	N	N	N	y	y
• **Verified IVA**	N	N	N	y	y
• **DMP Agreed**	N	N	N	y	y
• **Not interested**	Y	Y	Y	y	y
• **Does not qualify**	Y	Y	Y	y	y
• **Clawback**	N	N	N	y	y
• **Verified Debt Charity**	N	N	N	y	y
• **Not Struggling**	Y	Y	Y	Y	Y
Y= YES					
N= NO					

When Agent converts status to :

• **Transferred IVA**
• **Transferred DMP**
• **Transferred Debt Charity**

They should choose be a Closer / Team Lead / Manager – now agent cannot change status

When Closer converts status to :

- **Pack out**

They should choose a Team Lead / Manager

When Team lead converts status to :

• **Pack in**
• **SIP Fixed**

They should choose a Manager

When a Closer / Team Lead / Manager is chosen , after any status : That Lead will show on the dashboard of the tagged employee I.E. Closer / Team Lead / Manager.

Whenever a lead is converted to status below , the employee has to choose a date and time , or it has to be converted to other status available to their hierarchy.

• **New Lead**
• **Call Back**
• **Not responding**
• **Transferred IVA**
• **Pack out**
• **Pack in**

Dashboards

Agent / Closer

Call Backs

- **Todays call backs**
- **Missed call backs**
- **Upcoming call backs**

My Prospects

- **New leads**
- **Call Back**
- **Not responding**
- **In progress**

• **Transferred IVA**
• **Transferred DMP**
• **Transferred Debt Charity**
• **Pack out**
• **Pack in**
• **SIP Fixed**

- **Achievements (only for the current Calendar month)**

• **Verified IVA**
• **DMP Agreed**
• **Verified Debt Charity**

- **Feed back**
- **All my Leads (Reporting)**

Team Lead

Leads added by team : yesterday and this calender month

Achievements My team : last week / calender month

Team Call Backs

- **Todays call backs**
- **Missed call backs**
- **Upcoming call backs**

My Prospects

- **New leads**
- **My Transfers**

• Transferred IVA
• Transferred DMP
• Transferred Debt Charity
• Pack out

- **Docs in**

• Pack in
• SIP Fixed

- **Achievements (only for the current Calendar month)**

• Verified IVA
• DMP Agreed
• Verified Debt Charity

- **Feed back**
- **All my Leads (Reporting)**

MANAGER

Leads added by ALL teams : yesterday and this calender month

Achievements : last week / calender month

Team lead / Closer / Agent: Call Backs

- **Todays call backs**
- **Missed call backs**
- **Upcoming call backs**

My Prospects

- **New leads**
- **My Transfers**

• Transferred IVA
• Transferred DMP
• Transferred Debt Charity
• Pack out

- **Docs in**

• Pack in
• SIP Fixed

- **Verified (only for the current Calendar month)**

• Verified IVA
• DMP Agreed
• Verified Debt Charity

- **Feed back**
- **All Leads (Reporting)**

Internal Chat

Agent cannot chat with another agent personally,

Only group chat, visible to manager and team leads and admin.

All chats should be recorded and visible to manager /admin

Emails

Team leads / Managers/ Admin
can send email.
Fixed templates / can select email address.

Text

Can send Selected templates for text .