Lead Management System (LMS)

Requirements Document

1

glenn.jester@gmail.com
(469) 222-7940
CustomSoftware.biz

Executive Summary

BulletAnt is seeking to establish itself as a premier service provider for high quality leads – leads which are both exclusive and generated on-demand for commercial and residential contractors of all service types across the United States. The Lead Management System (LMS) is being designed with the following high-level requirements to support this objective:

- Manage the sale, acquisition, and distribution of leads from suppliers to accounts
- Provide robust support for sales reps who establish and build professional relationships with accounts over time, and who create and manage lead campaigns
- Track and manage sales rep commissions, sales goals, purchase orders
- Provide executive-level (KPI) reporting to help manage and grow the business
- Build a scalable platform to support services from lead suppliers other than roofing, i.e. siding, fencing, plumbing, flooring, etc.

User Roles

The system will be divided into four (4) distinct user roles, each with its own user interface, screens, and reports as follows:

<u>Sales Rep</u>

Sales reps are the primary users of the system, outnumbering all other users combined. Members of this group will have full and complete web access to their assigned accounts, contacts as well as all the data related to those entities. They will be able to add, edit, and delete their own appointments, tasks, notes, contacts, accounts and campaign records as they work. Sales reps will be provided functionality to manage campaigns over the course of their life cycle, to include discounts and exception handling. As BulletAnt obtains and imports fresh prospecting data, sales reps will be able to search through this data and assign themselves as lead agents. Any sales rep will be able to view account activity such as notes, appointments, and campaigns for other accounts and sales reps regardless of who entered the information, but will only be able to change the information they create. Of course, commission earnings will be tightly controlled – viewable only by individual sales reps, and locked against editing except by managers and administrators.

Sales Rep Managers

Sales rep managers have the responsibility of overseeing the work of their sales reps. Members of this group will have access to all accounts in the system and will be able to edit and modify data anywhere, including lead agent assignments, discounts and commissions. However, the manager's interface will be designed to focus only on the sales reps assigned to their personal team. Managers will be able to add and remove members from teams, and be able to reset passwords for any sales rep. The system features a goals component, which will allow managers to set and track sales goals for their team members. The progress that sales reps make toward these goals will be measured and reported to managers through the manager's interface.

Executives

Executive leadership will have the highest vantage point into the data. This user interface will feature KPI and executive-level reporting. The information provided will both be viewable through the interface and exportable to Excel files.

Suppliers

Suppliers are the final user group to be added to the system. The original plan to have suppliers update a shared Excel document on the web has been replaced with a dedicated user interface. Microsoft has relaxed its access rules and now allows a small number of non-subscribers to use Access web apps. This interface will offer an "in-box" type screen where suppliers will approve pending campaigns, be alerted to any exceptions that have occurred, and other messages. It will also discretely expose campaigns and leads for processing – that is, to be updated with contact, address, and appointment information.

Project Scope

- Support the creation and maintenance of lead "campaigns" that will span a full life-cycle from early geo-zone mapping and preliminary scheduling all the way to campaign successful completion.

- A campaign is officially defined as:

  … *a finite quantity of leads submitted for approval and eventual production to the calling center for a particular service type on behalf of an account that will span a limited period of time and exist within an exact geographic boundary.*

- Every campaign generated in the system will have a dynamic map of the geographic zone it corresponds to digitally saved. This map is to be instantly delivered to the calling center for approval – while still on the phone with the client. The calling center will used the coordinates of the campaign map as a guide as they pursue residential leads within its boundaries.

- Premature campaign cancellations are not allowed, and there are no exceptions. All campaigns will be prepaid in advance. The system will calculate all leads, discounts, and taxes during creation and generate an email with a PayPal command button that allows the client to click and pay the invoice instantly – all while the sales rep is on the phone taking the order.

- The system will integrate with our existing email service provider, and track all email correspondence on a client-by-client basis.

Requirements

- Microsoft Access 2010 (32-bit) will be used for the frontend component for each of the user interfaces.

- Microsoft SQL Server 2012 will be used as the database engine. The offices of BulletAnt do not have a local area network. Therefore, the database will be hosted by a separate data provide and accessed by all users of the system via MS Access frontend components.

- Executives, managers, sales reps, and calling center personnel will all share the same data with security and role-based restrictions adhered to.

- The project is to include advanced search capability for locating accounts by various means.

- Sales reps will have the ability to assign themselves as lead agent on any new account imported into the system.

- The system will provide a full array of CRM features to include contact and account management, and the ability to create, edit, and delete notes, tasks, and appointments.

- Every user interface will have a quick-action dashboard as an opening screen. These screens will include actionable items awaiting the user upon logging in for the day.

- The system will track all commissions earned by sales reps and managers. This includes advanced reporting for executive leadership. Commissions will be assessed at the client level for each sales rep.

- As a policy, discounts are discouraged. If a discount is offered to a client, the system must track that discount and prevent it from being applied until manager approval has been received.

- The system is to provide for the entering and maintenance of lead and campaign rate cards. This information is confidential and is to be restricted from sales rep viewing.

- Only executives should be allowed to view and manage "purchase orders" with the calling center. These are internal invoices that are bulk transactions made in advance for a specific quantity of leads. As campaigns and leads are processed in the system, the quantity of leads in these PO's is to be deducted accordingly. A primary objective of the system is to accurately track every lead's full life cycle, and provide executive leadership a view into that data via KPI reporting.

- The system will provide a mechanism for both importing and exporting of data.

- The calling center interface will include an "in-box" of all campaign awaiting approval. These will include a visual mapping of the campaign along with the requested schedule of production.

- The system will also provide an overnight processing job that execute at a specific time. The purpose of this “job” is to filter all new leads entered into the system after hours by the calling center personnel, draft a map of those leads on a client-by-client basis, convert that map into a single link, draft an email to the client with the appointments listed in chronological order, and email the clients directly.

System Architecture

- The LMS is a web-based solution hosted in the “cloud”.
- BulletAnt is responsible for providing a sufficiently sized internet drop for employees at the office to access the system.
- All employees may access the system remotely.
- The LMS will be accessible by authorized users only, credentials required.