Customer Relationship Management (Ladder CRM)

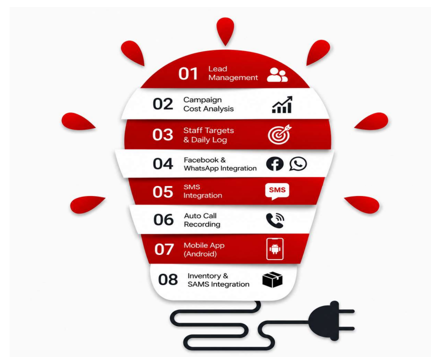
Ladder CRM that helps you sell smarter, better, faster.

Reach out to customers at the right moment and engage them across every channel. SHE Ladder CRM helps businesses of all sizes close more deals in the smarter way. SHE Ladder CRM is web-based software which allows you to access it from anywhere, any time, and from any device (Laptop, iPad, Android and Apple phone).

Capture → Manage → Communicate → Calls → Follow-up → Inventory → Dealers → Campaigns → Staff → Reports → System

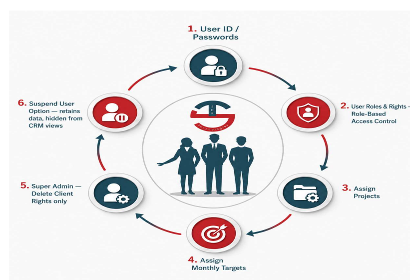
01 Key Modules at a Glance

- ✦ **Lead Management**
- ✦ **Campaign Cost Analysis**
- ✦ **Staff Targets & Daily Log**
- ✦ **Facebook, WhatsApp, Twilio & Telnyx Integration**
- ✦ **SMS Integration**
- ✦ **Auto Call Recording**
- ✦ **Mobile App (Android)**
- ✦ **Inventory & SAMS Integration**



02 User / Staff Setup

- User ID / Passwords
- **User Roles & Rights** — Role-Based Access Control, with hierarchy-based permissions for Manager, Team Lead, and Agent levels
- **Staff Rights Management** — Define which leads, reports, or modules each staff member can access, and control edit/delete permissions by role
- **Data Visibility Rights** — Staff can only view their own assigned leads/clients unless the admin grants extra access
- Assign Projects
- Assign Monthly Targets
- **Super Admin** — Delete Client Rights only
- **Suspend User Option** — retains data, hidden from CRM views
- **Assign Target** — monthly or quarterly targets per staff member
- **View Target** — real-time target tracking
- **Target Analysis** — performance analytics vs. assigned targets

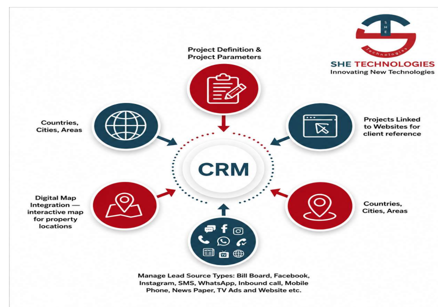


03 Staff Daily Log

- **Maintain Daily Log** — structured daily activity records
- **Daily Work / Activities Done** — all tasks, calls, and meetings logged
- **Login Location Capture** — GPS location recorded at every mobile login
- **Follow-up Location Capture** — location recorded on each follow-up submission

04 Projects Define

- Project Definition & Project Parameters
- Projects Linked to Websites for client reference
- Countries, Cities, Areas
- Manage Lead Source Types: Bill Board, Facebook, Instagram, SMS, WhatsApp, Inbound call, Mobile Phone, News Paper, TV Ads and Website etc.
- Digital Map Integration — interactive map for property locations



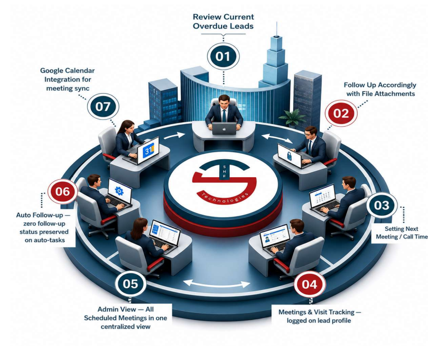
05 Inventory Management

- **Full Inventory List** — status, pricing, and specifications
- **Import Inventory via Excel** — bulk upload and update
- **Property Categorization** — by project, type, floor, size
- **Inventory Linked with SAMS** — synchronized property data
- **CRM & ERP Inventory Link** — end-to-end data flow
- **Mature Leads** — Token & Receipt Generation via SAMS

06 Lead Generation

- Client Name, Mobile & Detail
- Interested In: Plot / Shop / House
- Level of Interest: Low / Medium / High
- Lead # for each separate project
- Facebook Lead Fields — Budget, Purpose, Property Type, Size, Best Contact Time
- Second Phone Number / WhatsApp Contact from Facebook Leads
- Lead ID Search — instant access by unique Lead ID
- Old Leads Upload via Excel — bulk import with user assignment
- Setting next meeting / call time

07 Follow-ups & Meetings



- Review Current Overdue Leads
- Follow Up Accordingly with File Attachments
- Setting Next Meeting / Call Time
- Meetings & Visit Tracking — logged on lead profile
- Admin View — All Scheduled Meetings in one centralized
- Auto Follow-up — zero follow-up status preserved on auto-tasks
- Google Calendar Integration for meeting sync
- **Mature and Closed Leads Tracking** — Follow-up history preserved and viewable even after a lead is marked as mature or closed, for reference and audit purposes

08 Meta Integration

- **Campaign** — track Facebook ad campaign performance from CRM
- **Lead direct to Ladder CRM** — auto-fetched from Facebook ad campaigns
- **WhatsApp Bulk Campaign Marketing** — Meta-approved bulk messaging
- **Auto WhatsApp Reminders** — meeting and site visit reminders
- **Meta Template Approval System** — submit and manage WhatsApp templates

09 SMS Integration

- Auto SMS
- No Need of SIM / Phone
- Multi Occasional SMS Generation
- Meeting Reminders via SMS, Email & Push Notifications

10 Calls & Voice System

- **Web-Based One-Click Call Dialing** — dial directly from CRM
- **Twilio Integration** — international calls with automatic recording
- **Telnyx Integration** — alternative voice provider fully supported
- **Mobile Call Recording** — recorded and stored against lead profile
- **International Call Recording** — fetched and archived in CRM
- **Google Cloud Call Archive** — all recordings backed up to Google Cloud
- **Call Upload to Google Drive** — staff can backup recordings from mobile app
- **Recording to Text Conversion** — mobile call audio auto-converted to text
- **Speech to Text for Follow-ups** — voice-based follow-up notes
- **Staff Call Review Report** — full call log for each staff member
- **Agent Call Response Time Report** — tracks time taken to dial after assignment

11 Campaign Cost Analysis

- Budget Allocation
- Budget Consumption
- Budget Variance Analysis — budgeted vs. actual spend
- Facebook Campaign Tracking — lead count, cost per lead, and conversion data
- Social Media Progress Report — Facebook, WhatsApp, and other platforms
- Date Wise Source Report — filter leads by date and acquisition source

12 Mobile App

- Android App Available
- User Friendly and Easy to Use
- Auto Call Recorder Facility
- Recorded Call Attached with Follow-up
- Follow-up with File Attachments — images, PDFs, audio, video
- Follow-up Location Capture
- Google Calendar Integration — meetings synced to Google Calendar

13 Dealer Management

- **Onboarding Dealers:** Onboard dealer records efficiently into the CRM.
- **Dealer POC Details:** Dealer Point of Contact details managed for clients, dealer clients, and lead sales.
- **Dealer Sales Count:** Admins can view each dealer's sales count directly in the CRM dealer view.
- **Dealer Leads Column:** Dealer list shows number of leads associated with each dealer.
- **Direct Dealer Assignment:** Admins can directly assign a specific dealer to a user from the management panel.
- **Dealer Approved Commission:** Commission column available in the dealer list for clear compensation tracking.
- **Filtering Dealers with Activity:** Filter dealers based on files or sales activity.
- **Filtering Based on Dealer POCs:** Filtering options available for specific dealer POCs.
- **Dealer Filter on Mature Lead Report:** Filter mature lead report by dealer to analyze channel partner conversions.
- **Region Assignment:** Assign dealers and users to specific regions for structured territorial management.

14 CRM New Features

- Auto Leads Generation from Facebook — leads fetched automatically via Ladder CRM API
- WhatsApp Leads Capture — manage WhatsApp contacts and capture leads from conversations
- Google Sheets Integration — pull lead data directly from Google Sheets
- Leads & Clients Assignment by Round Robin Method
- Staff Roster can be applied in Lead Assignment
- Lead Switching — zero follow-up leads auto-switched to other staff (sequence, random, or fixed)
- Leads & Clients Assignment Notifications and Popup Alerts
- Lead Scoring — engagement-based scoring for user-wise and manager-wise prioritization
- Duplicate Lead Detection — auto-detect and flag duplicates
- Implemented Country Mobile Dialing Code Structure in CRM
- Inventory Live Integration of SAMS with CRM
- Token Model to Add and Reflect Cash in Lead Maturity
- Pending Task List of Mobile Calls Synced with CRM
- Add More Than One Number in CRM for Clients/Leads
- Attachments on Lead Maturity — images, PDFs, audio, and video
- Commission Calculation of Marketing Company at Any Lead Mature
- Admins can listen audio recording of sales staff by follow-up activity list
- Close Lead Reopening — closed leads reactivated from pipeline
- Admin Comments on Leads with email notification to assigned agent

15 Cost Analysis

- Setting Values against Lead Sources
- Generate & Analyze Reports
- Budget Variance Reports — budgeted vs. actual per campaign

16 Sales Target Report

- Staff Target Reports
- Team-wise Target Filtering
- Performance Analytics — individual and team metrics

17 Staff Reports

- Staff Progress Reports
- Staff Project Reports
- Staff Sales Report
- Staff Meetings Report — all meetings per staff member
- Staff Calls Report — full call log with duration and outcome
- Staff Pending Calls — overdue call tracking
- Staff Leads Intensity Wise Mature and Closed
- Staff KPI Report
- Staff Daily Log File
- Agent Call Response Time Report

18 Project Reports

- Project Progress Reports
- Project Staff Reports
- Mature Leads Report — high-conversion opportunity focus
- Duplicate Leads Report — manage duplicate entries
- Close Lead Report — won/lost with reason tracking
- Reference Wise Lead Report — leads by referral source
- Team-wise Reports — management-level filtering
- Lead Scoring Reports — per user and manager level
- Overall Combined Lead Report — unified pipeline overview

19 Excel & Chart Reports

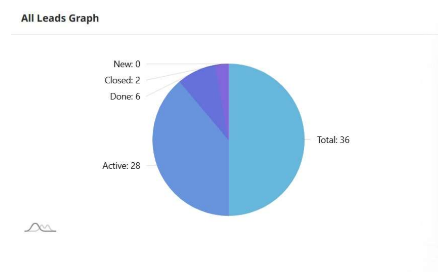
- Generate Excel Report — download full data exports
- Excel Upload — Auto Country Code & City Validation
- Bar Chart
- Pie Chart
- Line Chart
- Custom Dashboards — personalized KPI widgets

20 System, UI & Integrations

- Mobile App (Android) — full-featured for leads, calls, and follow-ups
- Web-Based Access — any browser, any device
- Dark & Light Theme
- Custom Layouts — match different team workflows
- Minimizable Headers — maximize screen space
- Version Control — system updates with rollback support
- Open API / REST API — integrate with third-party applications
- Google Cloud Integration — call archive storage
- Notification Policy Configuration — SMS, WhatsApp, Email, Telnyx, Twilio

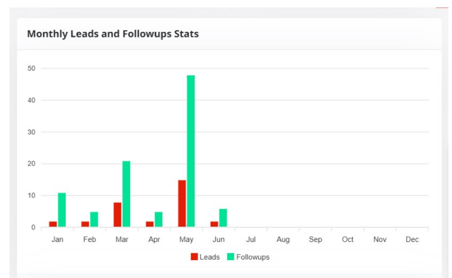
21 Graphs

1. All Leads Graph:



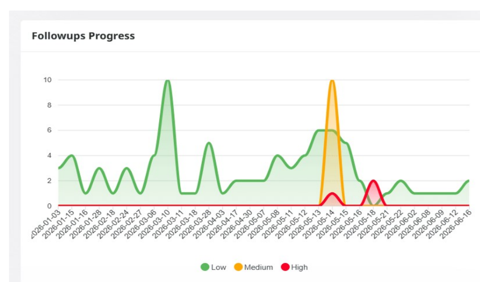
All Leads Graph a pie chart that visually breaks down all leads by their current status — New, Active, Done, and Closed — with the total count shown in the center. This chart is also auto-generated from the leads table and requires no separate data upload. The only requirement is that every lead record must have a status field correctly assigned.

2. Monthly Leads and Follow-ups:



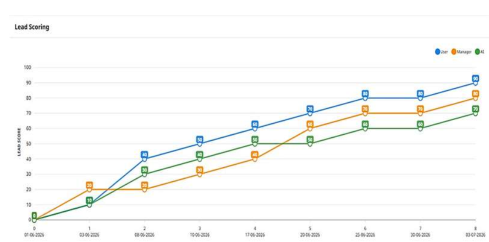
Monthly Leads and Follow-ups Stats in which you see a bar chart displaying the number of leads and follow-ups that have been created monthly (January-December). Leads are indicated by the red bars, follow-ups by the green bars. This chart will automatically be calculated based on the grouping of lead records and follow-up records grouped by created date; thus, every lead and follow-up will have to be correctly uploaded to the system with a created date if using this chart.

3. Follow-ups Progress:



Follow-ups Progress, a multi-line chart that tracks follow-up activity over time. It has three colored lines — green for Low priority, yellow for Medium priority, and red for High priority. This chart is generated from the follow-ups table, which is a separate table from leads. Each follow-up record must include a date, a priority level, and a Lead ID that links it back to the corresponding lead in the leads table.

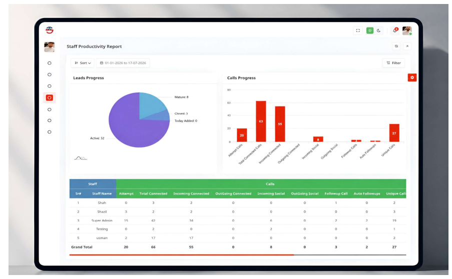
4. Lead Score chart:



Lead Score chart, which displays a triangle-shaped graph for each lead showing two scores on a scale of 0 to 100 — the User Score shown as a solid red triangle and the Manager Score shown as a dashed blue triangle. This data is stored in a separate lead scores table. Each record must include the Lead ID it belongs to, the user score, the manager score, and the month for which the score applies, since the chart can be filtered by month using the dropdown at the top right.

5. Staff Productivity Report:

This report gives a full view of **staff performance** and activity measures. It records calls, follow-ups, meetings, and communication via various mediums. Managers can effortlessly analyze and compare performance, filter data, and easily identify top performers.



6. Overall Combined Lead Report:

This report provides a comprehensive view of **team performance** and activities related to leads. It has calls, meetings, visits, and tracks progress – all in one dashboard. Managers can use data filters to make decisions and increase productivity.