01 / OWN PROJECTS & PRODUCTS

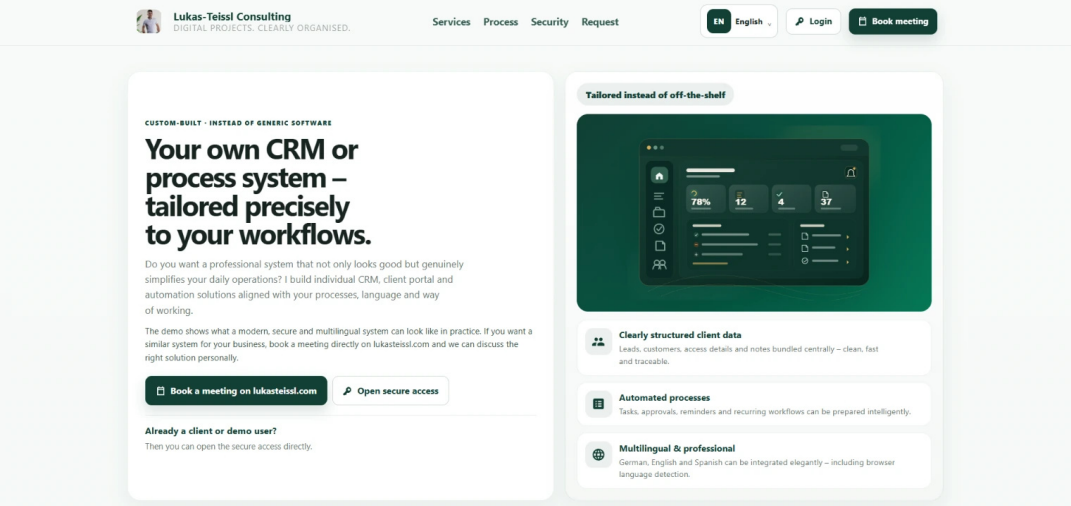
# Sales CRM & Automation

Sales as a connected process, not just a contact list.

View online

DOCUMENTED CONTRIBUTION

My sales CRM connects contact history, tasks, reminders and customisable workflows. The application demonstrates how I translate sales logic into software, with appropriate fields, status models and traceable handling across several steps.




Desktop view · Supplied project screenshot · Original language: EN. Source language: EN.

AREAS OF WORK

**Concept · Software development · User experience**

## Project overview

The system demonstrates how contacts, prospects, client history, tasks, approvals, reminders, billing planning and custom workflows can be connected in a secure platform. Fields, statuses and reports follow your real operating model.

## Task & objectives

A sales process requires more than an address list. For each contact, the previous conversation, current status and next action should be understandable. The platform addresses this connection between information and the work that follows from it.

## My contribution

I am developing the solution as a custom CRM and automation system. Customer history, tasks, follow-ups and tailored workflows are central to it. Fields, roles, dashboards and reports are shaped around the use case. Additional interfaces are planned separately rather than promised as standard features.

## Features that support everyday work.

### History in context

Client history keeps the information needed for subsequent work together.

### Tasks and follow-ups

Reminders and next actions support systematic follow-through.

### Adaptable workflows

Status models and roles can be aligned with the actual sales process.

## Design & user experience

The interface presents a contact together with its history and outstanding tasks. Consistent status terminology helps users navigate. A clear transition between overview and individual work supports day-to-day use.

## Value of the solution

The system supports continuous handling from an initial contact to the next follow-up. Information stays within the context of the case, allowing an implementation to match your sales process instead of introducing another disconnected list.

## Could this approach work for your project?

Which handovers, follow-ups or approvals shape your sales process? We can turn them into a specific CRM and automation scope.

## Further insights

**Visit project website**

**Explore the project online** →

**Arrange an initial conversation** →

**All references online**