AOSWARE

Multi-Vertical CRM

Product Specification & UX Concept

Simple by default. Industry-specific when needed.

Core Product Idea

One CRM platform with one shared data model and four configurable industry experiences. Clients select a starting model, then adjust stages, terminology, fields, automations, permissions, dashboards, and mobile views without rebuilding the application.

Prepared for product evaluation and development planning

1. Product Vision

Build a CRM that feels as easy as a modern task app, but can adapt to very different sales motions. The product should avoid the "everything visible at once" problem common in large CRMs. Users should see only the information and actions relevant to their role and industry.

Design Rule

80% shared CRM foundation + 20% industry model. Do not build four separate CRMs. Build one platform with configurable templates.

- Fast onboarding: a new user should understand the home screen in under 10 minutes.
- Few clicks: common actions should take 1–3 clicks or taps.
- Role-based simplicity: sales reps, managers, service reps, and admins get different views.
- Configuration, not customization code: most client changes should be made through an admin setup screen.
- Desktop + mobile parity for core activities, with mobile optimized for calls, visits, tasks, notes, and quick updates.
- ERP-friendly architecture so opportunities can convert to quotes, orders, accounts, contracts, or service work.

2. Recommended Product Structure

Layer	Purpose	Examples	Rule
Core CRM	Shared engine	Accounts, contacts, leads, activities, tasks, notes	Always available
Industry Model	Preconfigured workflow	Distribution / Software / Contract / Service	Client selects one starting model
Client Configuration	No-code setup	Fields, stages, labels, forms, rules	Admin-controlled
Integration Layer	Connect business systems	ERP, email, calendar, phone, ecommerce	API + webhooks

3. Industry Models A–D

Model A — Distribution Sales

Use case: Best for office products, Jan/San, MRO, wholesale, foodservice, furniture and similar distributors.

Default pipeline: Lead → Qualified Account → Quote → First Order → Active Customer → Reorder / Growth

Industry fields: Account potential, product categories, vendor lines, territory, buying frequency, last order, margin, lost sales, contract/pricing status

High-value functions: ERP customer/order history, quote/order conversion, reorder alerts, declining spend, cross-sell opportunities

Model B — Software / SaaS Sales

Use case: Best for software, subscriptions, technology services and recurring-revenue offerings.

Default pipeline: Lead → Discovery → Demo → Evaluation → Proposal → Verbal Commit → Closed Won → Onboarding / Renewal

Industry fields: ARR/MRR, seats/users, product/module interest, current system, contract term, implementation target, renewal date

High-value functions: Calendly/meeting flow, proposal/e-signature, subscription/billing, onboarding handoff, renewal and expansion alerts

Model C — Product / Contract Sales

Use case: Best for project sales, bids, furniture projects, contracts, government/education opportunities and larger one-time purchases.

Default pipeline: Lead → Scope → Estimate / Bid → Submitted → Negotiation → Awarded → Fulfillment / Project

Industry fields: Bid number, due date, project value, products, purchasing authority, competitors, contract dates, documents, compliance requirements

High-value functions: Document management, approval workflow, quote/configure/price, award tracking, contract reminders

Model D — Service Professional Sales

Use case: Best for copier/service dealers, consultants, field service providers, agencies and recurring service organizations.

Default pipeline: Inquiry → Qualification → Site Visit / Consultation → Proposal → Agreement → Active Client → Service / Renewal

Industry fields: Service type, location, equipment/assets, SLA, recurring value, appointment, assigned technician/consultant, next service date

High-value functions: Scheduling, service tickets, asset/equipment history, recurring billing, client follow-up, satisfaction and renewal

4. Core CRM Functions

Home / My Day

- Today’s tasks and overdue items
- New leads assigned to me
- Opportunities requiring action
- Upcoming calls/meetings/visits
- At-risk customers or deals
- One-tap quick actions: Call, Email, Note, Task, Update Stage

Accounts & Contacts

- One customer/account record with contacts, locations, activities, open opportunities, orders/contracts/service history
- Timeline view instead of separate disconnected activity screens
- Relationship map for decision makers, influencers and service contacts

Lead & Opportunity Management

- Kanban pipeline and list view
- Drag-and-drop stage movement on desktop; tap-to-change on mobile
- Required fields only when entering a stage, not all at once
- Win/loss reasons and next-step date

Activities & Communication

- Calls, emails, SMS, meetings, visits, notes and tasks
- Email/calendar sync
- Meeting scheduling and reminders
- Templates for common outreach and follow-up

Automation

- Lead assignment by territory, vertical, source or round robin
- Follow-up reminders after inactivity
- Stage-based tasks
- Reorder, renewal, contract and quote-expiration alerts
- Manager escalation when critical tasks are overdue

Reporting

- Pipeline by stage and rep
- Forecast
- Activity vs outcome
- Customer growth/decline
- Retention and renewal
- Source conversion
- Industry-specific KPIs through configurable dashboard cards

Marketing & Communications

A first-class module that combines CRM customer data with personal email, bulk marketing providers, campaign engagement, and retention workflows. The CRM remains the customer system of record while third-party providers handle delivery, audience synchronization, and engagement events.

- Campaigns — create, schedule, sync and track campaigns; support provider-hosted campaigns and CRM-controlled campaigns.
- Lists / Segments — dynamic and saved audiences built from CRM, ERP and behavioral criteria such as industry, territory, customer status, sales, last order, opportunity stage, tags and engagement.
- Templates — reusable marketing and transactional email templates with merge fields, branding, provider mapping and approval controls.
- Email History — unified history of one-to-one, transactional and marketing emails linked to Accounts, Contacts, Leads and Opportunities.
- Engagement — capture delivered, opened, clicked and campaign-response events and expose them in the customer timeline and lead/account scoring.
- Unsubscribes — centralized consent and suppression handling. An unsubscribe must never be overwritten by normal contact synchronization.
- Bounces — track hard/soft bounces, complaints and invalid addresses; suppress addresses when provider rules require it.
- Provider Connections — one-click OAuth/API connections for Constant Contact, Mailchimp, Elastic Email, Microsoft 365 / Outlook, Gmail / Google Workspace, plus an extensible connector interface for SendGrid, Brevo, ActiveCampaign, Campaign Monitor and others.
- Campaign Reporting — recipients, delivery rate, opens, clicks, click-through rate, bounces, unsubscribes, conversions, revenue influence and performance by segment, rep, territory and customer type.

Communication channels should be separated into three technical categories: Personal Email (Outlook/Gmail), Marketing Email (Mailchimp/Constant Contact and similar platforms), and Transactional Email (Elastic Email/SendGrid/Brevo or another approved delivery service).

The provider layer must use a standardized connector interface so CRM features never depend directly on one vendor. Provider-specific APIs, tokens, webhooks and field mappings stay inside the connector.

5. User Interface Recommendation

Primary Navigation

Keep the permanent navigation to 6–7 items maximum: Home, Accounts, Leads, Opportunities, Activities, Reports, More. Industry modules such as Orders, Contracts, Service, Assets or Renewals appear under “More” or as context tabs.

Desktop layout

Left navigation, top global search, center workspace, optional right-side activity/action panel. Use cards and white space. Avoid dense grids as the default.

Mobile app

Bottom navigation: Home, Accounts, Pipeline, Tasks, More. A floating + button creates a note, call, task, lead, opportunity or visit.

Record page

Header shows account/deal name, status, owner, value and next step. Tabs: Overview, Activity, Contacts, Related. Put the timeline in the center and quick actions above it.

Pipeline

Large stage columns, compact opportunity cards, value + next action + age. Allow filters by rep, territory, vertical, product line and date.

Search

One search box across accounts, people, deals, phone numbers, emails, order/contract IDs and notes.

Admin configuration

Wizard-based setup: choose model → rename objects → edit pipeline → choose fields → build forms → set automations → assign permissions → publish.

6. “Simple CRM” Rules

- Never show more than 5–7 primary navigation choices.
- Do not require more than 5 mandatory fields when creating a lead or opportunity.
- Progressive disclosure: advanced fields remain hidden until they become relevant.
- Every record should clearly answer: Who owns this? What is the status? What is the next action? When is it due?
- Default dashboards should be useful without client setup.
- Use plain language labels; let clients rename “Opportunity,” “Account,” “Contract,” etc.
- Every desktop workflow should have a mobile equivalent for field activity.

7. Configurability

Client Can Configure	Examples	Complexity
Terminology	Rename objects, stages, labels, menu items	Low
Fields	Text, number, date, dropdown, currency, lookup, formula	Low
Pipelines	Stages, probabilities, required fields, entry/exit rules	Low
Forms	Lead form, opportunity form, visit form, service intake	Low
Automations	Assignments, reminders, alerts, task creation	Medium
Dashboards	Cards, charts, filters by role or model	Low
Permissions	Role, team, territory, object, field and record scope	Medium
Integrations	Map external fields and events	Admin/IT

8. Integration Architecture

- Personal email and calendar: Microsoft 365 / Outlook and Google Workspace / Gmail using OAuth, with optional generic IMAP/SMTP support.
- Marketing email providers: Constant Contact, Mailchimp, Elastic Email, SendGrid, Brevo and other providers through a common MarketingEmailProvider connector interface.
- Marketing provider synchronization: contacts, lists/audiences, tags, campaigns, templates where supported, delivery events, opens, clicks, bounces, complaints and unsubscribe status through APIs and webhooks.
- Meeting scheduling: native scheduler or Calendly-style integration; AOSWARE has already explored CRM + Calendly + Zoom + Outlook synchronization patterns.
- ERP / commerce: customer, quote, order, invoice, payment, item, contract and service data through APIs and webhooks.
- Phone/SMS: click-to-call, logging, disposition and optional transcription/summary.
- Documents/e-signature: proposals, contracts, bids and forms.
- Identity: SSO, MFA, role-based access, audit trail and client-level data isolation.

9. Alignment With Existing AOSWARE Direction

The recommended approach fits prior AOSWARE CRM planning: start simple, standardize workflows, emphasize adoption and visibility, then expand into activity analytics, churn/retention, alerts and customer reporting. The prior deployment plan specifically called out orders/quotes, task assignment, issue tracking and internal communication as day-one capabilities, with later expansion into activity tracking, retention, alerts and account-health reporting.

Practical Product Direction

The strongest differentiator is not “more CRM features.” It is a CRM that starts with the right industry vocabulary and workflow, connects naturally to ERP/order/service data, and can be adjusted by an administrator without turning into a consulting project.

10. MVP Recommendation

Phase 1 — Foundation

Accounts, contacts, leads, opportunities, tasks, notes, activity timeline, personal email/calendar sync, pipeline, basic reports, role permissions, mobile-responsive web UI, and the base provider-connection framework.

Phase 2 — Industry Models

Release Models A–D with templates for stages, fields, dashboards, automations and record layouts. Add the Marketing & Communications module with campaigns, dynamic lists/segments, templates, provider connections, email history, engagement, unsubscribes, bounces and campaign reporting.

Phase 3 — Admin Builder

No-code pipeline, forms, field builder, terminology editor, automation rules and dashboard builder.

Phase 4 — Deep Integrations

ERP/order/contract/service integration, phone/SMS, e-signature, quoting, recurring revenue and customer portal.

Phase 5 — Intelligence

AI summaries, recommended next action, lead/account scoring, churn risk, pipeline risk, conversation summaries and natural-language reporting.

11. Suggested Screen Set

- Login / tenant selection
- Home / My Day
- Accounts list
- Account 360 record
- Leads list + quick create
- Opportunity pipeline (Kanban + list)
- Opportunity record
- Activities / tasks
- Calendar / meetings
- Reports dashboard
- Marketing & Communications dashboard
- Campaigns list + campaign record
- Lists / Segments builder
- Templates library
- Provider Connections / Email & Marketing settings
- Engagement, Unsubscribes and Bounces views
- Industry module (Orders / Contracts / Service depending on model)
- Admin: model setup, fields, pipeline, forms, automation, roles
- Mobile equivalents for Home, Accounts, Pipeline, Tasks and Quick Add

12. Success Criteria

- A salesperson can create and qualify a lead in under 60 seconds.
- A manager can see pipeline health and overdue follow-up without running a report.

- A client admin can alter a stage, field or label without developer involvement.
- An industry template can be deployed to a new client without creating a new code branch.
- Mobile users can complete at least 80% of daily sales activity without opening the desktop app.
- A marketing user can build a CRM-driven audience, publish it to a connected provider, and see campaign engagement return to the customer timeline without manual CSV handling.