

TIER C / CLIENT-READY PROOF

Sales & Operations CRM

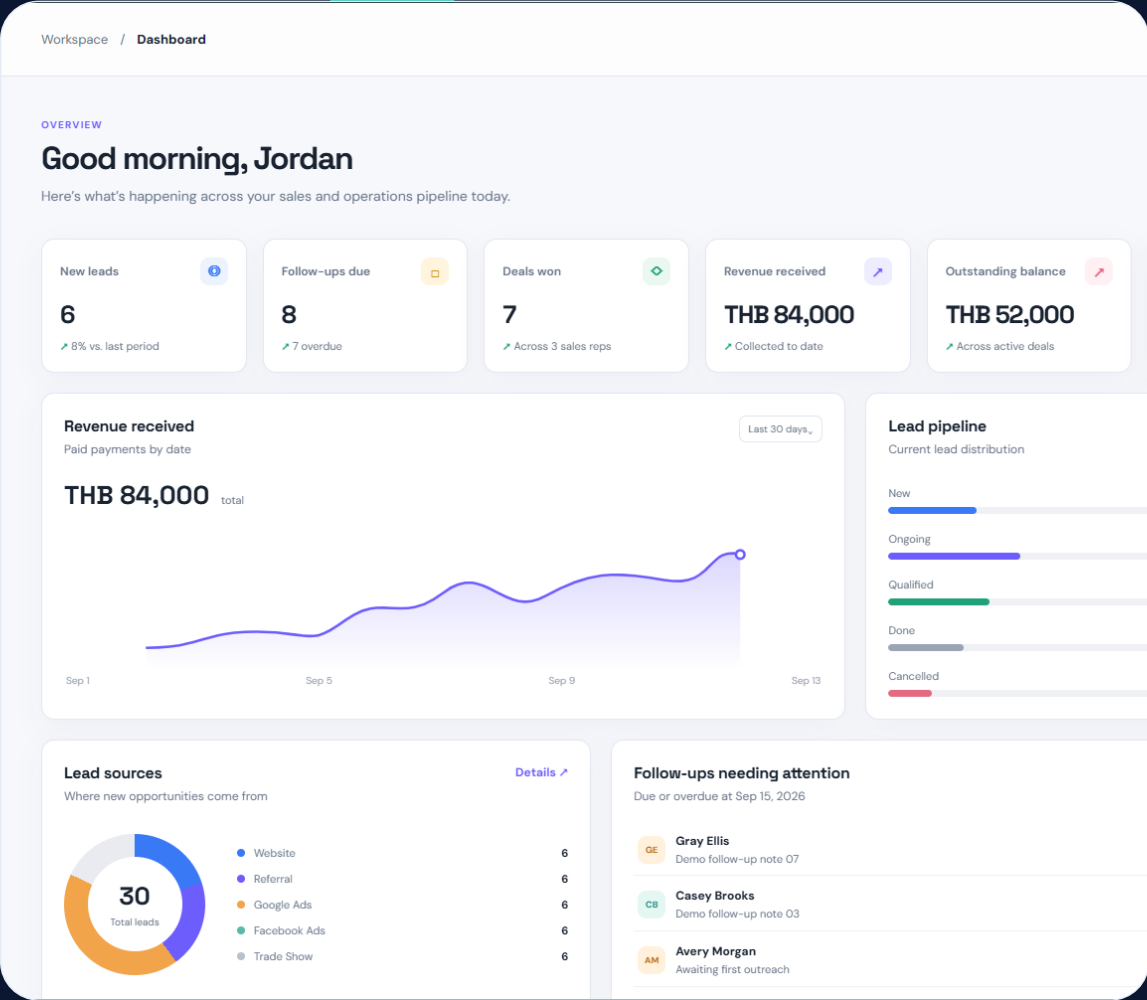
Lead-to-Installation Workflow & Management Dashboard

A public-safe case study of a connected sales and operations workflow.

PROJECT IDENTITY

Lead + follow-up + deal/payment + installation + audit

Real implementation experience, synthetic public demo data.



LIVE DEMO / sales-operations-crm.pages.dev

WHY THIS MATTERS

The work does not stop at lead capture.

One clear handoff from first contact to follow-up, payment, installation, and audit.

1 Fragmented ownership

Leads, conversations, deals, and field delivery can become separate lists with no shared rhythm.



2 Invisible handoffs

A qualified lead may be ready for a deal, but the next action or installation state is easy to miss.



3 Delayed reporting

Management sees a retrospective snapshot instead of a current view of what needs attention.



THE DESIGN QUESTION

How can a small sales and operations team keep the customer journey coherent without forcing every decision through one person or one spreadsheet tab?

The answer is an operating layer that makes the workflow legible.

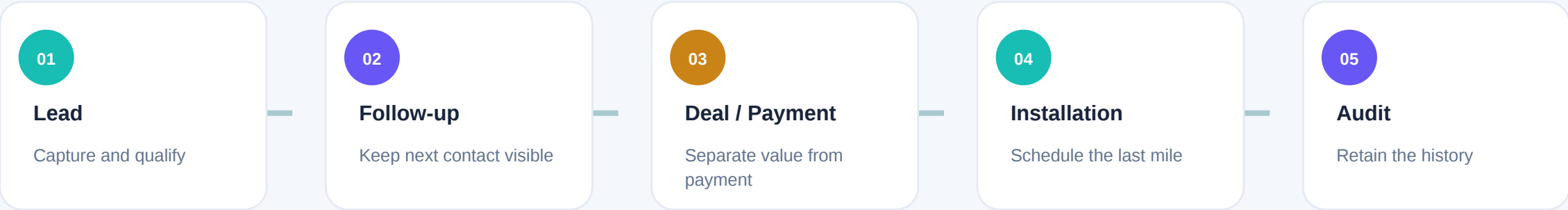
LEAD-TO-INSTALLATION

MANAGEMENT VISIBILITY

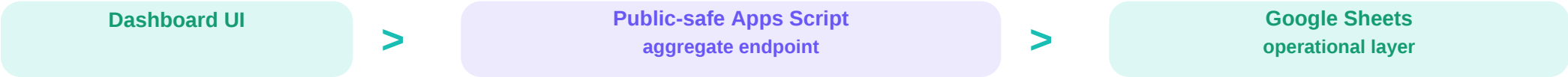
A CONNECTED OPERATING VIEW

One workflow, five operating moments.

The public demo turns the sales-to-delivery journey into visible, reviewable states with clear context and next action.



PUBLIC-SAFE ARCHITECTURE

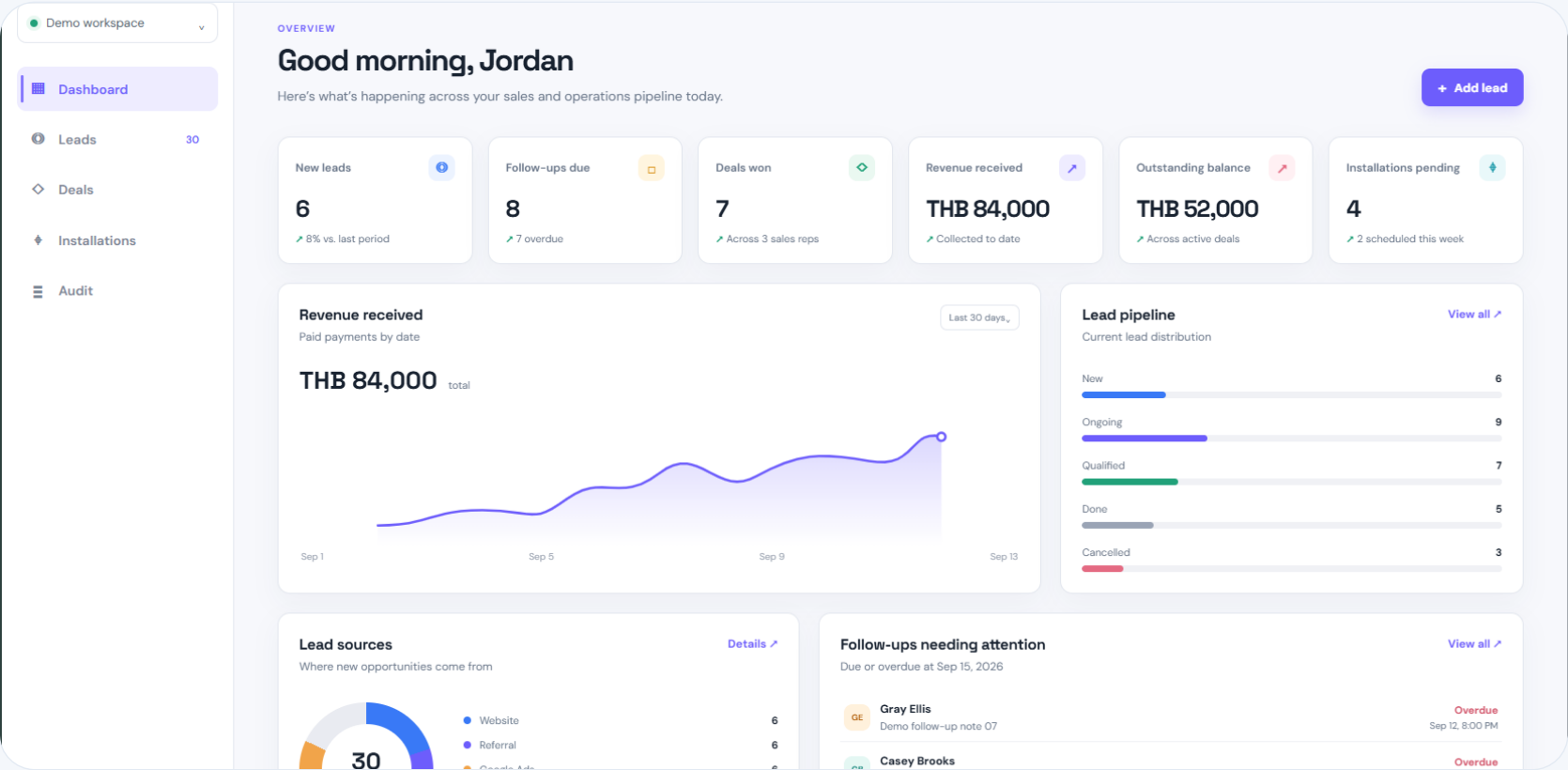


KPI summaries use the live aggregate path. Record-level public views use sanitized synthetic data; this is not row-by-row live sync.

MANAGEMENT VISIBILITY

A dashboard that points to the next decision.

Pipeline, follow-up attention, commercial state, payment visibility, and installation readiness in one management surface.



LIVE AGGREGATE

KPI summaries use the Google Sheets operational layer through a public-safe aggregate endpoint.

What this proves

- A manager can scan the operating surface quickly.
- The dashboard is connected to a real aggregate path.

Important boundary

Record-level screens remain sanitized synthetic demo views.

The frontend keeps the customer journey inspectable.

Larger proof views for qualification, follow-up context, activity history, and commercial state.

Dashboard

Leads30

Deals

Installations

Audit

Leads

Track every opportunity from first touch to qualified conversation.

Search leads...

All statuses

All sources

Filters

LEAD	SOURCE	SALES REP	STATUS	CONTACT	NEXT FOLLOW-UP	CALLS
AM Avery Morgan 081-000-1001 · Bangkok	Website	SALES-01	New	Not Contacted	Sep 14, 2026 OVERDUE	1
BC Blake Carter 081-000-1002 · Chiang Mai	Referral	SALES-02	Ongoing	No Answer	Sep 15, 2026 OVERDUE	1
CS Casey Brooks 081-000-1003 · Phuket	Google Ads	SALES-03	Ongoing	No Answer	Sep 13, 2026 OVERDUE	1
DB Drew Bennett 081-000-1004 · Khon Kaen	Facebook Ads	SALES-01	Qualified	Interested	Sep 16, 2026 UPCOMING	0
EC Emery Collins 081-000-1005 · Chon Buri	Trade Show	SALES-02	Done	Contacted	— No follow-up	0
FD Finley Dawson 081-000-1006 · Bangkok	Website	SALES-03	Cancelled	Not Interested	— No follow-up	0
GE Gray Ellis 081-000-1007 · Chiang Mai	Referral	SALES-01	Ongoing	Contacted	Sep 12, 2026 OVERDUE	1
HF Harper Foster	Google Ads	SALES-02	New	Not Contacted	Sep 18, 2026	1

LEAD PROFILE

X

Drew Bennett

LEAD-004 · Facebook Ads

Log activity

Edit lead

DB

081-000-1004

Khon Kaen

Qualified

Leads

Qualification and follow-up visibility

Lead Detail

Profile, contact context, and follow-up state

Audit	Drew Bennett DEAL-001	Home Connectivity Essential	THB 12,000	THB 12,000	THB 0	Paid	Won	—
	Emery Collins DEAL-002	Home Connectivity Plus	THB 18,000	THB 5,000	THB 13,000	Partial	Won	—
	Indigo Grant DEAL-003	Home Connectivity Premium	THB 24,000	THB 24,000	THB 0	Paid	Won	—
	Jordan Hayes	Home Connectivity	THB 12,000	THB 0	THB 12,000	Pending	Pending	—

Deals

Commercial value and payment state

Operational depth behind the interface.

The frontend is backed by structured operational views without exposing private infrastructure or client data.

Dashboard
Leads
Deals
Installations
Audit

Installations

Coordinate the last mile from scheduled appointment to completed handoff.

All statuses
Filters

Customer	Province	Installation Date	Time Slot	Assigned Team	Status	Map	Issue
Drew Bennett 081-000-1004	Bangkok	Sep 10, 2026	Morning	North Crew	Installed	Open map ↗	—
Emery Collins 081-000-1006	Chiang Mai	Sep 18, 2026	Afternoon	North Crew	Pending	Open map ↗	Customer requested confirmation
Indigo Grant 081-000-1009	Phuket	Sep 16, 2026	Evening	South Crew	Scheduled	Open map ↗	—
Logan Jensen 081-000-1012	Khon Kaen	Sep 19, 2026	Morning	East Crew	Scheduled	Open map ↗	—
Parker Nolan 081-000-1016	Chon Buri	Sep 22, 2026	Afternoon	East Crew	Pending	Open map ↗	Awaiting final appointment confirmation
Urban Sinclair 081-000-1021	Bangkok	—	—	—	Cancelled	Open map ↗	Deal cancelled before scheduling
Zoe Rivers 081-000-1026	Chiang Mai	Sep 15, 2026	Morning	North Crew	Installed	Open map ↗	—

Installations

Scheduling, assigned team, status, and issue

Dashboard
Leads
Deals
Installations
Audit

Audit

A human-readable activity stream for the lead-to-installation workflow.

58 events - deterministic IDE

Filters

Timestamp	Customer	Activity	Outcome	Actor	Details
Sep 13, 9:15 PM	Kai Irving LEAD-011	Call Attempt	Contacted	SALES-03	Discussed package options
Sep 13, 5:00 PM	Drew Bennett LEAD-004	Follow-up Scheduled	Scheduled	SALES-01	Confirmation follow-up scheduled
Sep 12, 8:15 PM	Harper Foster LEAD-008	Call Attempt	Contacted	SALES-02	Discussed package options
Sep 12, 5:00 PM	Blake Carter LEAD-002	Follow-up Scheduled	Scheduled	SALES-02	Next contact scheduled
Sep 12, 2:00 PM	Xander Ortiz LEAD-024	Lead Created	Created	SYSTEM	Synthetic demo lead created
Sep 12, 10:00 AM	Logan Jensen LEAD-012	Lead Created	Created	SYSTEM	Synthetic demo lead created
Sep 11, 7:15 PM	Gray Ellis LEAD-007	Call Attempt	Contacted	SALES-01	Discussed package options

Audit

Human-readable activity history

GOOGLE SHEETS OPERATIONAL LAYER

Corrected Installations projection plus selected deal/payment and audit views.

	UNION BENICANT	WILLIAMS LANE 1	BRANGLING				LANCASHIRE	UNION/MAIP/INST-007	SCREENING
9	Zoe Rivers	081-000-1036	Chiang Mai	2026-09-15	Morning		Installed	demo/maip/INST-007	
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Customer + Phone populated

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Deals / Payments

9	2026-09-11T10:15:00Z	Call Attempt	Cameron Underwood	SALES-01	Contacted	Discussed package options
10	2026-09-11T10:00:00Z	Deal Created	Devon Vaughn	SALES-03	Won	Created DEAL_009
11	2026-09-11T10:00:00Z	Lead Created	Winter North	SYSTEM	Created	Synthetic demo lead created
12	2026-09-11T02:00:00Z	Lead Created	Kai Irving	SYSTEM	Created	Synthetic demo lead created
13	2026-09-10T11:45:00Z	Installation Completed	Drew Bennett	OPS-01	Installed	Installation completed successfully
14	2026-09-10T11:15:00Z	Call Attempt	Cassy Brooks	SALES-03	No Answer	No answer; follow-up retained
15	2026-09-10T09:15:00Z	Call Attempt	Xander Ortiz	SALES-03	No Answer	No answer; follow-up retained
16	2026-09-10T09:00:00Z	Deal Created	Joe Rivers	SALES-02	Won	Created DEAL_008
17	2026-09-10T05:00:00Z	Lead Created	Val Morgan	SYSTEM	Created	Synthetic demo lead created
18	2026-09-10T01:00:00Z	Lead Created	Jordan Hayes	SYSTEM	Created	Synthetic demo lead created
19	2026-09-09T18:15:00Z	Call Attempt	Reese Parker	SALES-02	No Answer	No answer; follow-up retained
20	2026-09-09T12:00:00Z	Deal Created	Parker North	SALES-03	Won	Created DEAL_006

Audit history

From scattered activity to a reviewable operating rhythm.

Qualitative value only: clearer decisions, cleaner handoffs, and fewer blind spots.

BEFORE

Lead list

- > Separate follow-up notes
 - > Deal and payment updates
 - > Installation status
- Management visibility arrives after the fact.

AFTER

- Lead + next action
- Deal / payment state
- Installation readiness
- Audit history + management view

The workflow becomes easier to review, own, and improve.

Visibility

See pipeline, revenue, outstanding balance, and installations pending.

Continuity

Carry context from qualification through payment and field delivery.

Control

Keep operational tables and audit history available for review.

Built to be understood, not just demonstrated.

A compact proof of systems thinking across sales, operations, data, and delivery.

MY ROLE

- Solution design
- Workflow modeling
- Public-safe demo architecture
- UI implementation
- Apps Script / operational projection
- Proof capture + release QA

TECH STACK

- Cloudflare Pages
- Google Sheets
- Apps Script
- Synthetic CRM data adapter
- Responsive frontend
- Audit / projection views

PROOF LINKS

Live Demo

<https://sales-operations-crm.pages.dev>

Live KPI summaries use the aggregate path.
Record-level screens are sanitized synthetic demo views.

READY FOR A CLIENT CONVERSATION

Explore the workflow in the live demo, then use this case study to discuss the business problem, operating model, and proof boundaries.

[VIEW LIVE DEMO ->](#)