Theeb CRM (Broker)

Project Profile: Your Fully Customized CRM

Prepared By: KHALED AL THEEB E F A TECHNOLOGIES
Website: https://www.khaledaltheeb.com/
CRM Demo Link: https://theeb-crm-broker.khaledaltheeb.com

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1. Introduction

In today's fast-paced business landscape, a **one-size-fits-all CRM** often falls short of meeting evolving company needs. Our **fully customized CRM**, developed by **KHALED AL THEEB E F A TECHNOLOGIES**, is designed to **adapt** to your organizational processes, **streamline** lead and deal management, and **empower** your team with data-driven insights. By integrating property listings, social media leads, WhatsApp communication, **multi-language support**, and a **responsive web-based interface**, our system ensures every department—from Sales to HR—operates in harmony.

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2. Key Advantages

1. **Full Customization**
    - Built to mold around your workflows, not the other way around.
    - Easily scale or modify features as your business grows.
2. **Web Application & Responsive Design**
    - Access the CRM from desktops, laptops, tablets, or smartphones.
    - The interface automatically adapts to any screen size, ensuring a seamless user experience regardless of device.
3. **Automated Lead Assignment & Reshuffling (***customizable to align with your specific business logic***)**
    - Attendance-based lead distribution each morning—only active staff receive new leads.
    - 10-day assignment cycle to close deals; leads automatically return to the pool if not followed up.
    - Smart triggers (e.g., no answer, not interested) ensure no lead goes unmonitored.

4. **Stage-Based Deals & Automated Commissions (***customizable to align with your specific business logic***)**
    - Deals proceed through various stages (Negotiation, Pending Approval, etc.) until final closure.
    - **Agent commissions** are computed at the final stage, with each staff member's commission percentage factored in.
    - **HR-defined Targets**: Assign monthly or quarterly targets for each staff; the CRM automatically updates achievement vs. target analytics.
5. **Multi-Language Interface (**English/Arabic, etc.)
    - Switch seamlessly between English, Arabic, or other languages based on user preference.
    - Ideal for organizations with bilingual or multilingual teams and clients.
6. **Modern UI with Dark/Light Modes**
    - Users can switch to dark mode or light mode to suit personal comfort or reduce eye strain.
    - A sleek, user-friendly interface enhances adoption and productivity.
7. **Seamless Integrations**
    - **Bayut & Other Listing Portals:** XML import/export to keep listings in sync.
    - **Meta (Facebook/Instagram):** Auto-capture leads from ad campaigns.
    - **WhatsApp:** Send messages directly from the CRM and maintain conversation history.
8. **Robust Security & Daily Backups**
    - Built on **PHP Laravel 11**, leveraging the latest security best practices.
    - Hosted on a **secured VPS**, ensuring sensitive data is encrypted and protected.
    - **Daily backups** mitigate data loss and downtime risks.

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3. Core Modules

3.1 Leads Management

- **Lead Pool:** Central repository with advanced filters and search.
- **Life Cycle Visualization:** Track every interaction and follow-up from initial contact to closed deal.

- **Automated Follow-Up Rules:** No-follow-up and no-answer triggers ensure leads never stagnate.
- **Manual Leads Import:** Easily import old or existing leads from Excel sheets into the Leads Store; push them to the lead pool whenever needed.

3.2 Clients & Client Requests

- Convert leads into clients seamlessly and keep a comprehensive profile of each.
- **Client Requests**: Let your team see and respond to specific customer needs collaboratively.

3.3 Properties & Projects

- Specialized for **real estate** or project-driven businesses.
- Sync listings with third-party sites (e.g., Bayut) via **XML import/export**.
- Maintain developer information, project phases, and status updates in one place.

3.4 Attendance & Staff Management

- Integrated clock-in/clock-out system tied to lead distribution.
- HR Tools: Track employee attendance, manage teams, set monthly/quarterly targets, and monitor real-time progress.

3.5 Follow-Ups & Deals

- Log calls, emails, WhatsApp messages—easily specify the contact method.
- **Multi-Stage Deal Pipeline**: Deals pass through stages (e.g., "Negotiation," "Pending Documentation," "Closed") with customizable requirements.
- **Commission Calculation**: At the final deal closure, the system calculates agent commissions based on the predefined commission percentage.
- **Achievement vs. Target**: Automatically updates each agent's analytics, showing how close they are to meeting HR-defined goals.

3.6 Communication Channel

- Post announcements, share updates, or highlight important milestones—company-wide.
- Foster cross-department collaboration without switching platforms.

3.7 Kanban-Style Board

- **Drag & Drop Workflow**: Agents see their assigned leads as "cards" and can **drag and drop** them into different statuses.
- **Quick Actions**: When moving a lead to a new status (e.g., "No Answer," "Qualified," etc.), agents can **log a note** or fill out a short form.
- **Manager Overview**: Managers and GMs can view **all agents' boards** simultaneously, providing a **bird's-eye view** of lead statuses across the team.

4. How It Works: The Lead-Shuffling Algorithm 1. Commissions (*customizable to align with your specific business logic*)

1. **Attendance Check:** Each morning, the CRM checks who is "active" (clocked in).
2. **Automatic Distribution:** Leads get equally (or according to custom rules) distributed to present agents.
3. **Time & Follow-Up Triggers**
   - **24-Hour Inactivity Return**
   - **No Answer =** 3 extra days before returning to the pool
   - **Not Interested / Not Eligible =** Sent for management review
   - **Interested =** Option to convert lead into a deal
4. **Manager Overrides:**
   - SuperAdmin or managers can manually reassign or shuffle leads at any time.

Outcome: Maximum coverage of leads, no missed follow-ups, and transparent accountability**.**

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5. Updated Assigned Leads Process

1. Our lead assignment process now includes **10 distinct statuses** to ensure **optimal tracking and follow-up:**

1.1. New

- **1.1.1.** **Fresh Leads:** 15-minute response window. If no action is taken, auto-reassigns to another active agent.
- **1.1.2.** **Manual/Reshuffled Leads:** Customizable end date/time can be set by managers.

1.2. In Progress

- **1.2.1.** Triggered when the agent **acknowledges** the lead (log a note or create a follow-up).
- **1.2.2.** **Grants 24 hours** to either update the lead status or proceed to another stage.

1.3. No Answer

- **1.3.1.** Used if the agent attempted contact and **got no response**.
- **1.3.2.** Grants **48 additional hours** to keep trying.

1.3.3. Automatically sends an email (if available) to the lead indicating a missed call attempt.

1.4. Callback

1.4.1. If the lead requests a **later call**, agent sets a **date/time** within 7 days.

1.4.2. System creates a **calendar event and task** to remind the agent.

1.5. Qualified

1.5.1. Lead shows **real interest**; agent completes 4 questions (purpose, timeline, location, budget).

1.5.2. Lead **remains** with the agent unless it's moved to "Close Lost."

1.6. Cold Lead

1.6.1. For leads interested in **buying beyond 1 month**.

1.6.2. Agent sets a **future callback**; system adds a **task + calendar reminder**.

1.6.3. Lead's retention extends to **callback time + 7 days**.

1.7. **Meeting Done**

1.7.1. After qualifying a lead, the agent can log **meeting details** (in-person or virtual).

1.8. **Option Sen**

1.8.1. The agent has **shared possible options** (properties, proposals) with the lead.

1.8.2. Notes can be logged for each option sent.

1.9. **Close Won**

1.9.1. The lead accepts an option; a deal is successfully finalized.

1.10. **Close Lost**

1.10.1. Lead **fails** to proceed further; reasons can be "Junky" or "Not Junk."

1.10.2. **Review Process:** Reviewer decides whether to block the lead, return it to the pool, or manually assign to another agent.

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5. Manual Assignment Enhancements

- **Random Distribution to a Group**
  - A **SuperAdmin** or **GM** can manually assign a **selected number of leads** to **a group of agents.**
  - System will randomly distribute these leads among the chosen agents.
- **Leads Store Integration**
  - When leads from the **Leads Store** are manually assigned, they become part of the **active pool** with a "from the store" flag.
  - The store records are marked as **converted**, distinguishing them from fully new leads.

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7. Integrations in Detail

- **Bayut / Property Portals**
  - XML feeds keep your listings **up-to-date** automatically.
  - No need for duplicate data entry—sync once and share everywhere.
- **Meta (Facebook/Instagram)**
  - Automatically import leads from ad campaigns into the CRM for immediate action.
  - Track ROI with real-time data on which campaigns yield the best leads.
- **WhatsApp**
  - **One-click messaging** right from the CRM**.**
  - Conversation history is logged for a **single source of truth** on communication.

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8. Security & Reliability

1. **PHP Laravel 11**
   - Built on the latest Laravel framework with ongoing security updates.
   - Utilizes Laravel's **robust authentication** and **role-based authorization** system.
2. **Secured VPS Hosting**
   - Data resides on a **secured Virtual Private Server**, isolated from threats common in shared environments.
   - SSL certificates and firewall configurations ensure communication and file transfers are encrypted.
3. **Daily Backups**
   - Automated backups mitigate the risk of data loss.
   - Rapid restoration process in the event of unexpected downtime or incidents.
4. **Continuous Monitoring**
   - System logs and performance metrics help proactively identify and resolve issues.

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9. Why Choose Our CRM Over Other Solutions?

9.1 Comparison: Generic vs. Fully Customized CRMs

1. **Customization & Flexibility**
   - **Generic CRMs:** Often aimed at a broad user base, forcing you to adapt to their existing structure.
   - **Fully Customized CRM:** Tailored exactly to *your* workflows, removing the need for excessive add-ons to cover key functionality.
2. **Industry-Specific Features**
   - **Generic CRMs:** May require multiple integrations or paid extensions for specialized needs (e.g., real estate listings, lead shuffling, advanced commission tracking).
   - **Fully Customized CRM:** Incorporates these capabilities from the start and adapts them seamlessly to your business logic.
3. **Scalability & Ownership**
   - **Generic CRMs:** Often lock you into fixed pricing tiers and limited plugin ecosystems.
   - **Fully Customized CRM:** Offers complete hosting freedom (e.g., your own VPS) and source-code access, letting you evolve without vendor constraints or incremental fees.
4. **Cost Implications**
   - **Generic CRMs:** Lower initial subscription fees, but advanced modules or deep customizations may become expensive.
   - **Fully Customized CRM:** Generally, a higher upfront investment with the potential for *significant long-term savings*, especially if you expect frequent updates or unique feature demands.

9.2 How Our CRM Stands Out

1. **Tailored to Your Industry**
   - Perfect for real estate, consulting, or any business needing advanced project and property management.
   - Eliminates the need to force a one-size-fits-all CRM to "fit" your workflow.
2. **Stage-Based Deals & Commission Tracking**
   - Unlike many standard CRMs that demand complex add-ons, our solution natively supports deal pipelines, commission percentages, and HR-defined targets.
3. **Scalable & Future-Proof**

- As you grow, we can quickly add features, refine lead assignment rules, or integrate new platforms—cost-effectively.

4. **Enhanced Collaboration**
   - Centralized communication, universal requests, and automated updates foster teamwork across all departments.
5. **Modern UI & Multi-Language Support**
   - **Dark/Light Modes** enhance user comfort.
   - **Arabic, English, or other languages** can be enabled for diverse teams or regional markets.
6. **Web Accessibility**
   - **Any device, any location:** Our responsive, web-based application frees your staff to work securely from anywhere.
   - Cross-platform compatibility ensures minimal barriers to adoption.
7. **Robust Security Posture**
   - Built on **Laravel 11**, featuring **secured VPS hosting**, **daily backups**, and **best-practice encryption** to safeguard your data.

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10. Future Integrations

1. **HR System Integration**
   - **Daily Attendance Screening:** The CRM can seamlessly fetch attendance records from your dedicated HR system.
   - Further automates lead assignment rules and payroll-related processes.
2. **Accounting System Integration**
   - **Financial Calculations:** Automate commissions, salaries, invoices, and more.
   - Centralize financial data within the CRM for **real-time reporting** on profitability and expenses.

By incorporating these integrations, your CRM evolves into a **holistic operations hub**, uniting human resources, accounting, and sales management under one umbrella.

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11. Implementation & Support

1. **Fast Setup & Configuration**
   - We'll configure modules to mirror your **current workflows**, ensuring smooth adoption.
2. **Training & Documentation**
   - Our expert team offers structured training sessions for your staff and thorough user guides.
3. **Ongoing Support**
   - We remain available for enhancements, troubleshooting, and best-practice consultations, helping you get the most out of the system.

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12. Next Steps

1. **Schedule a Demo**
   - Experience the system in action with real data—see how deal stages, commission tracking, multi-language support, dark/light modes, and future integrations work in a live environment.
   - Visit our **CRM demo: https://theeb-crm-broker.khaledaltheeb.com**
     Use the following credentials to log in and explore**:**
     - Email**: super-admin@example.com**
     - Password**: password**
2. **Discuss Custom Requirements**
   - Share any unique workflows or target metrics you need integrated. We'll adapt the CRM to fit your vision**.**
3. **Receive a Tailored Proposal**
   - We'll detail a clear implementation roadmap, costs, and timelines specific to your business.

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13. Contact Us

KHALED AL THEEB E F A TECHNOLOGIES
Website: https://www.khaledaltheeb.com/

Email: info@khaledaltheeb.com
Phone: +971543004345

Ready to Modernize Your Business?

With our **fully customized CRM**, you can transform lead management, optimize deal pipelines, track commissions, integrate HR/Accounting, switch between multiple languages, and choose your preferred interface mode—**anytime, anywhere**. Let's collaborate to elevate your sales performance and deliver unmatched customer experiences—securely and reliably.

"Success is the sum of small efforts, repeated day-in and day-out."
— Robert Collier