PROJECT CASE STUDY

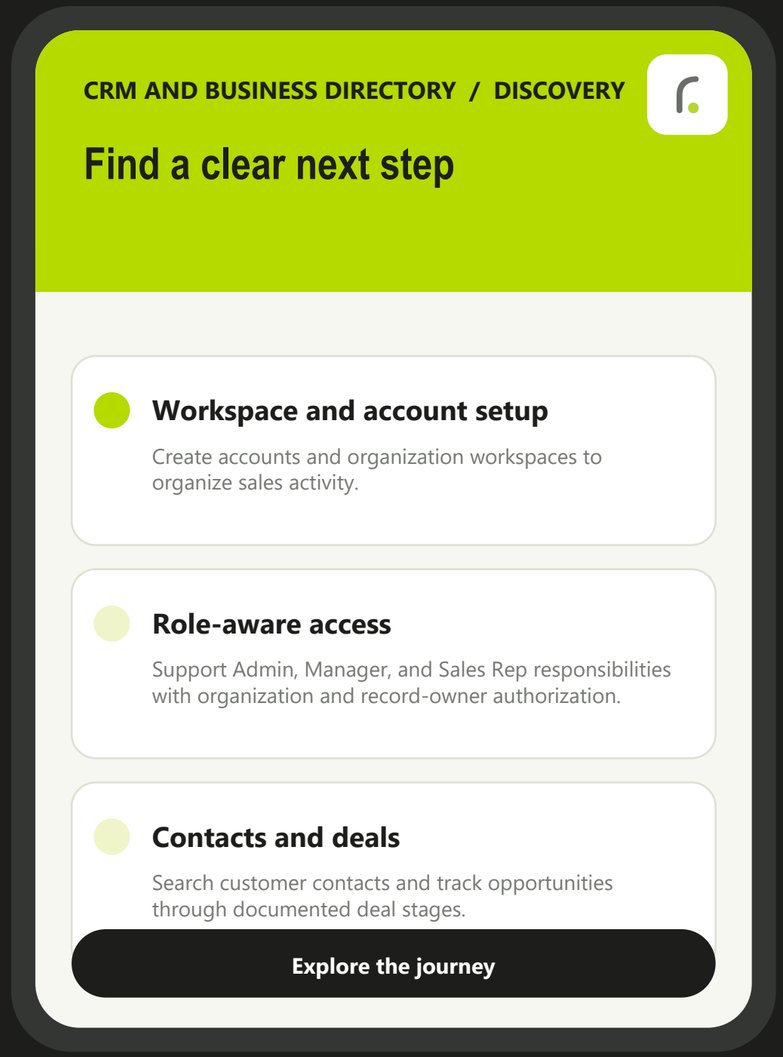
CRMDirectory

Mobile-first B2B sales workspace

A mobile-first sales workspace for customer relationships, deal pipelines, follow-up tasks, and organization-scoped access.

DOCUMENTED STATUS

Documented sales workspace; production hosting and CRM integrations out of scope



Illustrative interface based on documented project scope

The project in brief

CRMDirectory brings core B2B sales workflows into a clear, mobile-friendly workspace for the web and supported mobile platforms. Its documented scope covers organization workspaces, contacts, deals, tasks, pipeline summaries, and role-aware access for administrators, managers, and sales representatives.

PROJECT CHALLENGE

Sales teams need a dependable way to keep customer relationships, deal progress, and follow-up work connected. Teams also need organization and record-level access that reflects different responsibilities.

01 / PLATFORM

Mobile-first B2B sales workspace

02 / APPROACH

An organization-scoped workspace combines sales overview, searchable contacts, deal stages, and follow-up tasks, with role and record access enforced by the application.

03 / STATUS

Documented sales workspace; production hosting and CRM integrations out of scope

The summary describes documented project scope; it does not claim unverified results.

A clearer route through the challenge

Sales teams need a dependable way to keep customer relationships, deal progress, and follow-up work connected. Teams also need organization and record-level access that reflects different responsibilities.

DESIGN INTENT

An organization-scoped workspace combines sales overview, searchable contacts, deal stages, and follow-up tasks, with role and record access enforced by the application.

Project scope

The project documentation identifies production hosting, production customer data, and third-party CRM integrations as out of scope. The case study describes documented application workflows and does not claim integration with an external CRM.

Documented status

Documented sales workspace; production hosting and CRM integrations out of scope

Turn the brief into a coherent experience

An organization-scoped workspace combines sales overview, searchable contacts, deal stages, and follow-up tasks, with role and record access enforced by the application.

01	**Workspace and account setup**	Create accounts and organization workspaces to organize sales activity.
02	**Role-aware access**	Support Admin, Manager, and Sales Rep responsibilities with organization and record-owner authorization.
03	**Contacts and deals**	Search customer contacts and track opportunities through documented deal stages.
04	**Tasks and sales overview**	Review pipeline, contacts, and tasks due, then manage follow-up work.

Three capabilities shape the product

A visual index of the documented features in this project.

01

Workspace and account setup

Create accounts and organization workspaces to organize sales activity.

Role-aware access

Support Admin, Manager, and Sales Rep responsibilities with organization and record-owner authorization.

Contacts and deals

Search customer contacts and track opportunities through documented deal stages.

The cards summarize the project brief; they do not represent measured outcomes.

From discovery to a considered next step

The four stages below follow the project’s documented workflow.

Establish a workspace

An administrator creates an account and organization workspace.

Organize relationships

Find and maintain customer contacts in the sales workspace.

Track opportunities

Review deals and their current pipeline stages.

Plan follow-up

Use tasks and contact actions to keep next steps visible.

Workflow steps are documented journey descriptions, not evidence of completed or live transactions.

The documented product surface

A structured view of the feature set and its stated boundary.

Workspace and account setup

Create accounts and organization workspaces to organize sales activity.

Role-aware access

Support Admin, Manager, and Sales Rep responsibilities with organization and record-owner authorization.

Contacts and deals

Search customer contacts and track opportunities through documented deal stages.

Tasks and sales overview

Review pipeline, contacts, and tasks due, then manage follow-up work.

Workspace and account setup

Create accounts and organization workspaces to organize sales activity.

DOCUMENTED SCOPE

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Illustrative page concept; not a screenshot of a live product.

ILLUSTRATIVE CONCEPT

01 **Establish a workspace**

An administrator creates an account and organization workspace.

02 **Organize relationships**

Find and maintain customer contacts in the sales workspace.

07 / FEATURE SPOTLIGHT 2

Role-aware access

Support Admin, Manager, and Sales Rep responsibilities with organization and record-owner authorization.

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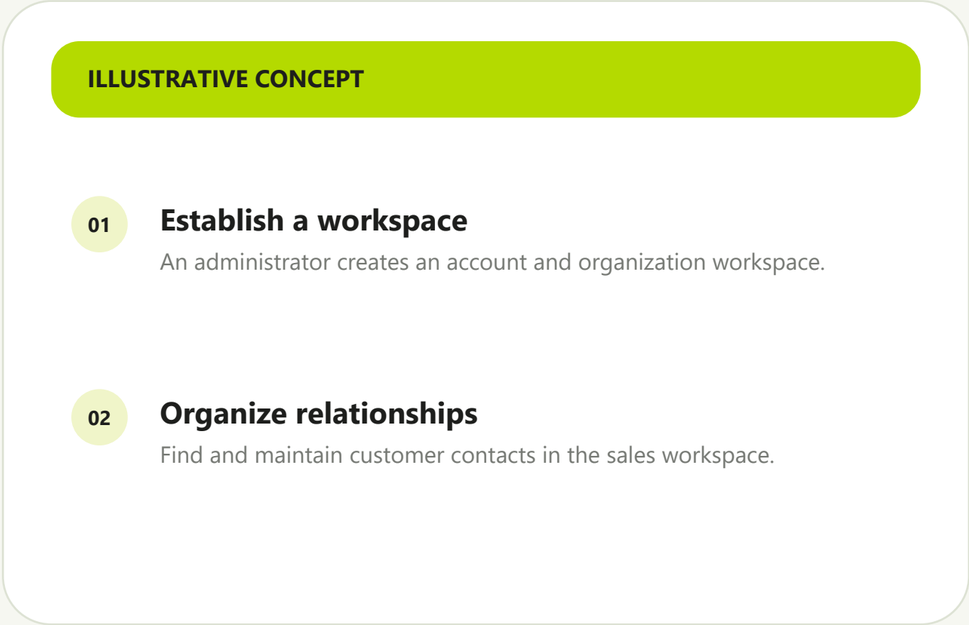

How the stages connect

A storyboard view of the documented journey, shown without invented users or outcomes.

01

Establish a workspace

An administrator creates an account and organization workspace.

02

Organize relationships

Find and maintain customer contacts in the sales workspace.

03

Track opportunities

Review deals and their current pipeline stages.

04

Plan follow-up

Use tasks and contact actions to keep next steps visible.

The sequence represents documented product intent; it does not imply a live customer transaction.

One product, connected capabilities

The feature groups below are presented as a conceptual map, not a technical architecture.

Workspace and account setup

Create accounts and organization workspaces to organize sales activity.

Role-aware access

Support Admin, Manager, and Sales Rep responsibilities with organization and record-owner authorization.

Contacts and deals

Search customer contacts and track opportunities through documented deal stages.

Relationships are illustrative and do not claim integrations or implementation details.

Separate the challenge from the solution

This comparison keeps the project problem and documented product response in view.

01 / CHALLENGE

Sales teams need a dependable way to keep customer relationships, deal progress, and follow-up work connected. Teams also need organization and record-level access that reflects different responsibilities.

02 / APPROACH

An organization-scoped workspace combines sales overview, searchable contacts, deal stages, and follow-up tasks, with role and record access enforced by the application.

The product, from entry point to next step

A simple blueprint drawn from the documented experience and feature set.

START

EXPLORE

CONTINUE

Establish a workspace

An administrator creates an account and organization workspace.

Workspace and account setup

Create accounts and organization workspaces to organize sales activity.

Plan follow-up

Use tasks and contact actions to keep next steps visible.

What the brief says

A concise reference for the product concept, its status and its documented scope.

Industry

CRM and Business Directory

Product

Mobile-first B2B sales workspace

Status

Documented sales workspace; production hosting and CRM integrations out of scope

Scope

The project documentation identifies production hosting, production customer data, and third-party CRM integrations as out of scope. The case study describes documented application workflows and does not claim integration with an external CRM.

Questions to validate before release

These are review recommendations, not completed project work or tested results.

User needs

Confirm the intended audience, core tasks and acceptance criteria.

Content clarity

Review language, labels and decision points for the relevant product context.

Responsive behavior

Test supported screen sizes, navigation and layouts on target devices.

Quality checks

Validate accessibility, error handling, privacy and operational expectations.

Scope matters as much as features

This summary reflects the documented project scope and does not add unsupported outcomes.

The project documentation identifies production hosting, production customer data, and third-party CRM integrations as out of scope. The case study describes documented application workflows and does not claim integration with an external CRM.

Documented status

Documented sales workspace; production hosting and CRM integrations out of scope

No unverified outcomes

No performance, customer, financial or operational results are claimed by this case study.

What comes before production

These general review areas are recommendations, not capabilities claimed as delivered.

Validate requirements

Confirm scope, acceptance criteria and user needs.

Review privacy and security

Define appropriate protections and operational controls.

Verify integrations

Confirm required external systems and validate them before launch.

Plan operations

Establish ownership, support, monitoring and maintenance responsibilities.

The concept at a glance

A mobile-first sales workspace for customer relationships, deal pipelines, follow-up tasks, and organization-scoped access.

Workspace and account setup

Create accounts and organization workspaces to organize sales activity.

Role-aware access

Support Admin, Manager, and Sales Rep responsibilities with organization and record-owner authorization.

Contacts and deals

Search customer contacts and track opportunities through documented deal stages.

Documented status: Documented sales workspace; production hosting and CRM integrations out of scope

EXPLORE THE PROJECT

A considered foundation

CRMDirectory

A mobile-first sales workspace for customer relationships, deal pipelines, follow-up tasks, and organization-scoped access.

VIEW PROJECT

Documented sales workspace; production hosting and CRM integrations out of scope

Documented project scope only; no unverified results are claimed.