



Good Software

Product Requirements
Document

CleverApp Sales Automation Platform

Version 2.6 (DRAFT)

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CleverApp Sales Automation Platform Version 2.6 - DRAFT

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1. Problem Statement

Based on our Q2 market research and interviews with 15 mid-market sales teams, we've identified a significant efficiency gap. Sales representatives spend an average of **8-10 hours per week** on manual, non-revenue-generating tasks, including repetitive data entry into CRMs, manual email follow-ups, and tracking pipeline progression. This administrative burden directly reduces active selling time by up to 25%, slows down the average sales cycle, and leads to inconsistent prospect engagement, directly impacting top-line revenue.

This problem represents a clear business opportunity. The market for sales automation tools is growing, but existing solutions are often overly complex, require technical expertise to implement, or are prohibitively expensive for mid-market teams. By failing to address this, we risk losing potential customers to more agile competitors.

2. Objective

CleverApp enables sales teams to automate and scale their outreach, follow-ups, and pipeline management through an intuitive no-code workflow builder. Our objective is to reduce repetitive manual work and increase productivity, allowing sales reps to spend more time selling and less time managing tools. This aligns with Good Software's mission to unleash productivity for business teams by building software that's powerful, yet easy to use.



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3. User Personas



Sam the Sales Rep

- **Role:** Account Executive, Mid-Market Tech
- **Quote:** *"My commission depends on building relationships and closing deals, not on data entry. Every minute I spend updating the CRM is a minute I'm not selling."*
- **Goals:**
 - Hit and exceed his quarterly sales quota.
 - Spend more time actively communicating with high-value prospects.
 - Maintain a clean and accurate pipeline with minimal effort.
- **Frustrations:**
 - Forgetting to follow up with leads, causing them to go cold.
 - Juggling multiple tools (email, calendar, CRM, spreadsheets) to track his work.
 - Team-wide processes that feel rigid and add administrative overhead.



Maria the Manager

- **Role:** Sales Manager, 2-8 direct reports
- **Quote:** *"I need a clear view of my team's activity and pipeline health to forecast accurately and coach effectively. If the data in the CRM isn't reliable, I'm flying blind."*
- **Goals:**
 - Ensure her team collectively meets or exceeds its sales targets.
 - Provide accurate sales forecasts to leadership.
 - Effectively coach reps by identifying bottlenecks and sharing best practices.
- **Frustrations:**
 - Inconsistent processes across her team leading to variable results.
 - Chasing reps to update their opportunities in the CRM.
 - Lack of real-time visibility into outreach performance (e.g., email open rates, reply rates).

4. Success metrics

Goal	Success Metric
Reduce time-to-close for sales teams by automating key steps	Decrease average sales cycle length by 20% within 6 months
Increase visibility into sales pipeline performance	Reach 80% adoption rate within the first month of rollout
Make it easy for teams to scale outreach with personalized workflows	Reduce manual sales task volume by 50% per user within the first quarter
Ensure usability and satisfaction of the product	Maintain Customer Satisfaction (CSAT) score of 4.5+

Analytics & Measurement Plan

Success Metric	Measurement Plan
Decrease sales cycle length by 20%	Metric: Avg. days between <code>opportunity_created</code> and <code>opportunity_closed_won</code> dates in the CRM. Report: A time-series dashboard in our BI tool comparing this metric for CleverApp users vs. a pre-launch baseline.
80% adoption rate	Metric: Percentage of licensed users who log in and trigger at least one workflow action per week. Report: A weekly cohort analysis dashboard in Amplitude/Mixpanel.
Reduce manual task volume by 50%	Metric: Ratio of automated actions (<code>email_sent_by_workflow</code> , <code>crm_updated_by_workflow</code>) to total actions. Report: An in-app dashboard for Sales Managers showing a per-user breakdown of automated vs. manual tasks.
Maintain CSAT of 4.5+	Metric: Average score from an in-app survey asking, "How satisfied are you with CleverApp?" Report: A quarterly report from our customer feedback tool (e.g., Pendo, Qualtrics) triggered 30 days after a user's first session.

5. Assumptions

- Sales teams already use tools like Salesforce, HubSpot, or Pipedrive.
- Users want to automate without coding or technical knowledge.

- Teams want flexible playbooks that adapt to their business needs.

6. Milestones

Q3 2025: Foundation & Alpha (July 1, 2025 - September 30, 2025)

- **Goal:** Build and validate the core engine of CleverApp with a small group of alpha testers.
- **Key Milestones:**
 - **Workflow Builder (MVP) Development:**
 - **Target:** July 7, 2025 - August 29, 2025
 - *Focus on the primary drag-and-drop functionality and core logic.*
 - **Initial CRM Integration (Salesforce & HubSpot):**
 - **Target:** July 21, 2025 - September 12, 2025
 - *This runs in parallel with the builder, ensuring the core components can connect to data sources.*
 - **Internal Alpha Release & Feedback:**
 - **Target:** September 15, 2025 - September 30, 2025
 - *Onboard internal teams and pilot customers. Gather critical feedback to prepare for the Public Beta.*

Q4 2025: Core Feature Expansion & Public Beta (October 1, 2025 - December 31, 2025)

- **Goal:** Expand the feature set to cover the full sales rep and manager lifecycle and prepare for a public launch.
- **Key Milestones:**
 - **Email Sequencing Module Development:**
 - **Target:** October 6, 2025 - November 7, 2025
 - *Build out template creation, scheduling, and reply-tracking functionalities.*
 - **Metrics Dashboard (V1) & Role-Based Permissions (MVP):**
 - **Target:** October 20, 2025 - December 5, 2025
 - *Develop the initial dashboard for managers and basic access controls for teams.*
 - **Public Beta / General Availability Launch:**
 - **Target:** Week of December 8, 2025
 - *Launch the platform to the public and begin tracking key success metrics (adoption, CSAT).*
 - **Holiday Code Freeze & Stability Monitoring:**
 - **Target:** December 19, 2025 - January 5, 2026

- *Pause new feature development to ensure platform stability during the holiday period.*

Q1 2026: Scale & Intelligence (January 6, 2026 - March 31, 2026)

- **Goal:** Enhance the platform based on user feedback and data, and introduce intelligent features to accelerate productivity.
- **Key Milestones:**
 - **Smart Suggestions (V1) Development:**
 - **Target:** January 13, 2026 - February 27, 2026
 - *Begin development of the AI-powered recommendation engine using data from the public launch.*
 - **Expanded CRM Integrations (Based on Demand):**
 - **Target:** February 2, 2026 - March 20, 2026
 - *Begin work on integrating the next most-requested CRMs from customer feedback.*
 - **Advanced Dashboard & Reporting Features:**
 - **Target:** February 23, 2026 - March 31, 2026
 - *Roll out enhancements to the metrics dashboard, including more filters and export options.*

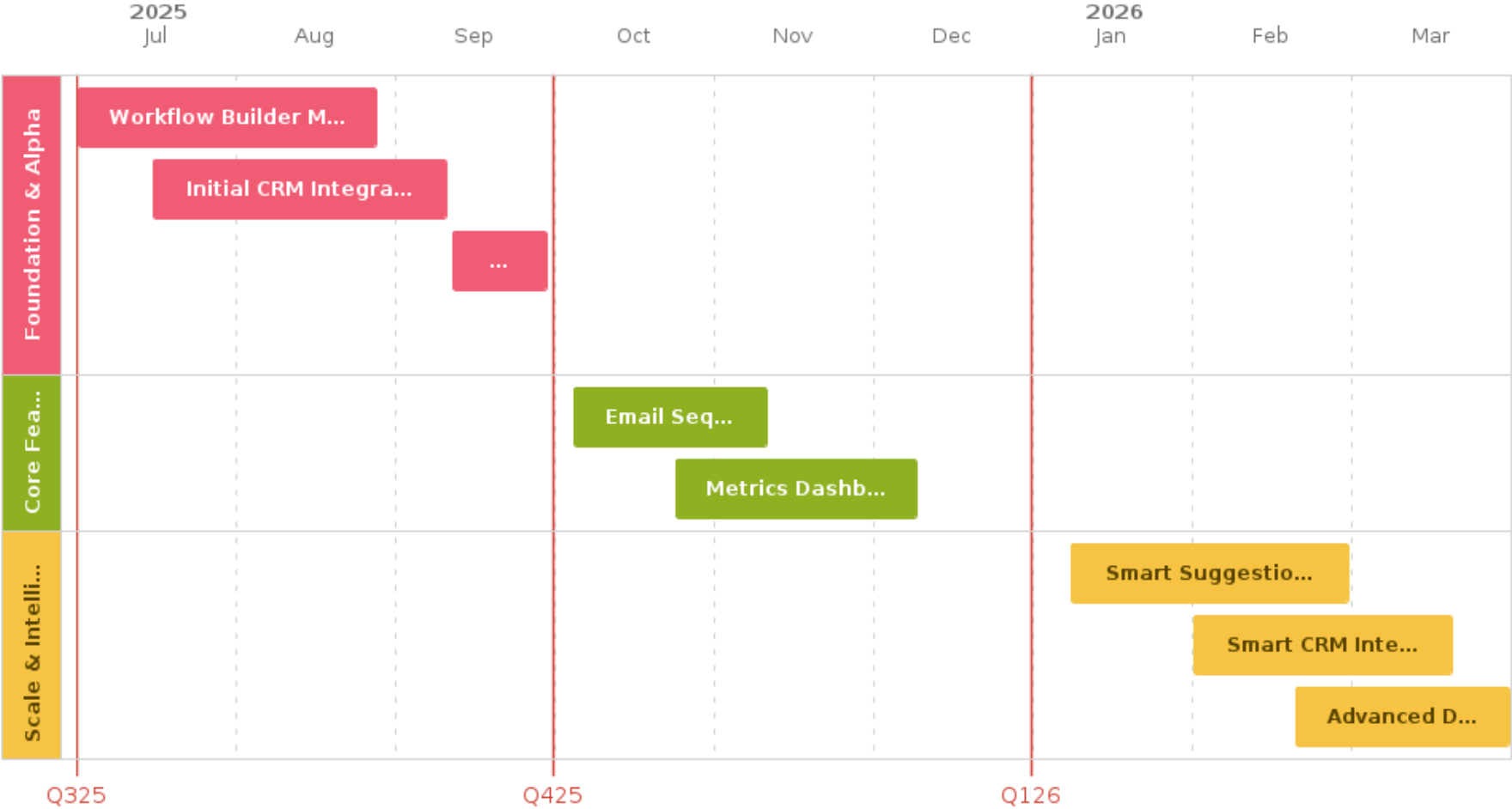
Milestones Roadmap



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Milestones Roadmap Snapshot

7. Requirements

Requirement	User Story	Importance	Jira Issue	Notes
Workflow Builder	As a Sales Manager, I want to define sales workflows using drag-and-drop building blocks, so my team can run consistent, high-performing processes.	HIGH	CLEVER-101 ⁸	Supports modular automation for sales teams. First feature to validate in alpha testing.
CRM Integration	As an Operations Admin, I want to integrate CleverApp with our CRM and email tools, so data is synced and up to date.	HIGH	CLEVER-102 ⁹	Initially launching with Salesforce and HubSpot support. Others based on demand.
Email Sequencing	As a Sales Rep, I want to schedule personalized emails as part of workflows, so I can automate follow-ups.	HIGH	CLEVER-103 ¹⁰	Includes templates and reply tracking.
Smart Suggestions	As a Sales Rep, I want AI-powered recommendations for my next action, so I can act faster and smarter.	LOW	CLEVER-104 ¹¹	AI components will be trained using anonymized workflow data.
Metrics Dashboard	As a Sales Manager, I want to see workflow performance metrics, so I can optimize outreach and remove bottlenecks.	HIGH	CLEVER-105 ¹²	Key for demonstrating ROI of CleverApp to stakeholders.
Role-Based Permissions	As an Admin, I want to control access to workflows and data, so our team data is secure and roles are clear.	MEDIUM	CLEVER-106 ¹³	Follows Good Software's permission framework. MVP includes basic role levels.

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8. User interaction and design

Design Direction

- Clean, modular UI aligned with Good Software’s design language.
- Focus on clarity and guidance for non-technical users.



First sketches of design direction

Accessibility

- Full keyboard navigation
- WCAG 2.1 AA compliance
- Tooltips, error states, and focus indicators

9. Dependencies

Dependent Team	Reason for Dependency
Marketing	Collaboration on launch announcements and blog posts.
Legal & Privacy	Review of data handling practices for GDPR compliance.

Dependent Team	Reason for Dependency
Customer Support	Training on new features to prepare for user questions.

10. Open Questions

Question	Answer	Date Answered
What is the minimum number of CRM integrations needed at launch?	—	—
How should users be onboarded into workflow creation (tours, templates, AI help)?	—	—
Should we support exporting workflows to other systems (e.g., JSON format)?	—	—

11. Out of Scope

- Mobile apps
- Advanced AI sales forecasting
- Support for non-sales use cases (e.g., marketing automation)

12. Reference materials

- **User Interview Synthesis:** [Sales Team Productivity Pain Points](#)¹⁴
- **Competitive Analysis:** [Competitive Analysis: Sales Automation Landscape Q2 2025](#)¹⁵
- **UI/UX Design Mockups:** [CleverApp - Figma Mockups & Prototypes \(V1\)](#)¹⁶
- **Technical Documentation:** [Technical Architecture Proposal for CleverApp CRM Integration](#)¹⁷
- **Project Kick-off Meeting:** [CleverApp Kick-off Meeting Notes & Decisions](#)¹⁸

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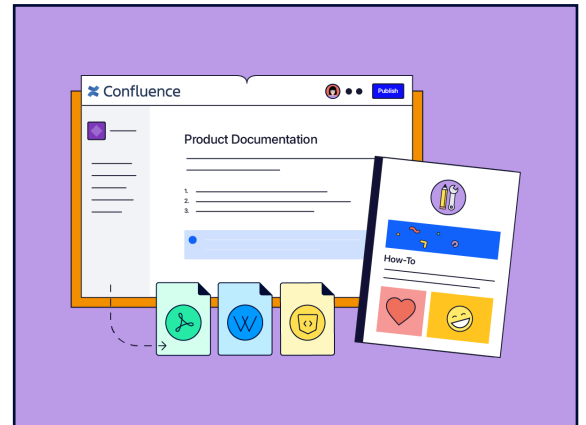
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