PRODUCT CASE STUDY · B2B SALES EXECUTION · MOBILE-FIRST · RUPAK GHANPATHI

100 open leads. 10 actions today.

Due isn't the same as urgent. This is a To-Do module that tells a salesperson what to act on now, why, and what to do next, without becoming another CRM or a tool for watching people.

100+
Open leads and quotations a salesperson may carry at once

10
Ranked actions on the Today screen (configurable)

0
AI in V1: every position in the list can be explained by a rule

The problem

Those 100+ records don't all need attention today. The hard part is knowing which need action now, which have crossed their expected time, which are stuck or waiting for approval, and which have already moved on. Showing all of them on a phone doesn't help. So the To-Do module is an **action layer on top of the sales workflow**: it surfaces the work that needs attention, explains why, and shows the next step. Records stay in the CRM.

Action, not storage
Each task links to a CRM record; it never duplicates it.

Explainable ranking
Simple rules a salesperson can read, so they trust what's on top.

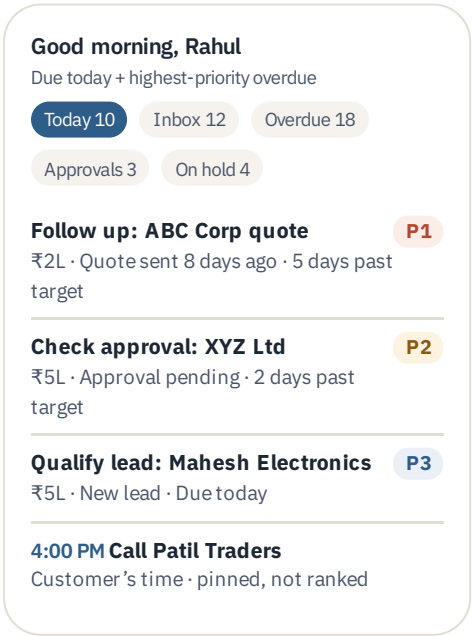
Exceptions, not activity
Managers see where work is stuck, not what each person did all day.

Assumptions

- The platform already holds leads, quotations, customers and workflow stages.
- Each task type has a target. My defaults, configurable per customer: **qualify a lead** within 1 working day · **follow up a quote** after 3 days · **complete an approval** within 1 working day · **callback** at the time agreed with the customer.
- The salesperson owns the workflow by default; other roles join only when the workflow needs them (a manager for an approval).

From HDFC: working with ownership buckets taught me the chain reaction: wrong owner → wrong workload → wrong manager view → wrong intervention. Ownership rules come first here for that reason.

01 The experience: Today, not everything



Tab	What it holds
Today	Top 10 ranked actions from due-today and the highest-priority overdue tasks
Inbox	Tasks that exist but aren't due yet
Overdue	The full overdue backlog, oldest first
Approvals	Approvals to act on, or the status of ones you're waiting for
On hold	Stuck tasks, each with a mandatory reason and revisit date

Why 10: enough for a day, few enough to finish; configurable, and nothing below it disappears.

Every task card shows

The action · customer, lead or deal · deal value where useful · current stage · due date or days overdue · priority · **a one-line reason** (“Quote sent 8 days ago”). Action + context + urgency, and nothing that turns it into a CRM screen.

Task actions in V1

Complete in one tap · **Reschedule** when a commitment changes · **On hold** with a reason and revisit date · **Reassign** by permission, only to an eligible owner. No separate snooze: reschedule does the same job.

Notifications: few, and only when they change what someone does

Trigger	Who gets it	Why
Morning summary	Salesperson	One push: “10 actions today, 2 are P1”
Task becomes P1	Salesperson	Five days past target is where deals go cold
Approval requested	Approver	Approvals block deals, so they can’t wait for a login
Callback in 15 minutes	Salesperson	A promise to a customer

No push for new Inbox tasks or P2/P3 changes: alert fatigue would teach people to ignore the P1 that matters.

02 How a task lives and ends

Created by a workflow event or manually → **Inbox** not due yet → **Today** due, or ranked overdue → **Done** completed by owner

Overdue past target; ages into P2, P1

On hold reason + revisit date; returns on that date

Auto-closed stage moved on; kept in history

Escalated still on hold after revisit → manager sees it

The To-Do always follows the workflow. If a lead is already marked Qualified while “Qualify lead” is open, the old task auto-closes and the stage change creates “Prepare quotation”. The salesperson is never asked to do work that’s already done.

From HDFC: ServiceNow PVT sign-off taught me that completing an action and completing the business process aren’t the same thing. That’s why tasks close on stage change, not only on a tap.

03 Where tasks come from

Workflow event	Task created	Target	Owner
New lead received	Qualify this lead	1 working day	Salesperson
Lead qualified	Prepare quotation	Configurable	Salesperson
Quotation sent	Follow up with customer	3 days	Salesperson
Approval required	Approve or reject	1 working day	Respective manager
Callback requested	Call the customer	Agreed date and time	Salesperson

Manual tasks cover work that happens on calls, WhatsApp and in meetings: action, due date, priority set by the creator, and customer context where relevant. They appear in Today only on their due date. Recurring tasks wait for a later release.

04 Prioritisation: one explicit sort order

Step 1, what needs attention: tasks due today, overdue tasks, and customer commitments whose time has come. Everything else stays in Inbox.

Step 2, the ranking, applied in this order:

1 · Priority tier
P1 = 5+ days past target · P2 = 1–4 days · P3 = due today

2 · Blocking stage
Within a tier, approvals go first: they block the deal

3 · Days overdue
Older before newer

4 · Deal value
Only a tie-break; the biggest deal doesn't jump the queue

Callbacks sit outside the ranking, pinned at the time the customer agreed, because the salesperson knows the context of that call.

Worked example

Task	Priority	Appears	Why
B · ₹2L quote, sent 8 days ago	P1 · 5 days past	1st	Follow-up target was 3 days
D · ₹5L approval, pending 3 days	P2 · 2 days past	2nd	Approval target is 1 working day
C · ₹50L new lead, today	P3 · due today	3rd	Qualification is due today; value doesn't lift it
A · ₹20L quote, sent yesterday	Not yet due	Inbox	Follow-up date hasn't arrived
E · callback requested today	Pinned	At agreed time	The customer's time decides it

05 Managers see exceptions, not activity

The flow is **team summary → exceptions → drill down → intervene**. Managers step in only where work is overdue, on hold past its revisit date, waiting for approval, or piling up on one person. V1 has no revenue rankings, productivity scores or activity tracking.

From HDFC: the MIS I built across JIRA and ServiceNow showed state, owner, ageing and time to TAT breach. It worked because managers looked at exceptions, not every ticket.

Team workload	Due	Overdue	On hold	Approvals
Rep A	8	3	1	1
Rep B	6	1	0	0
Rep C	14	**18 · flagged**	4	2
Rep D	5	0	2	0

Rep C's backlog is flagged as a workload problem, not a performance score: the manager's move is to rebalance or unblock, for example by reassigning eligible tasks.

06 What ships first, and what waits

V1

Today queue · Inbox · Overdue · Approvals · On hold with reason and revisit date · manual tasks · auto-generated tasks from five workflow events · task detail · complete, reschedule, reassign · notifications · manager workload view · task history

Later, and why

AI prioritisation: rules are explainable and easy to build · **recurring tasks**: edge cases not needed to prove the core · **outcome-based completion**: a simple Complete proves the idea · **productivity scoring**: turns a work tool into performance management

Edge cases the rules must handle

Case	Behaviour
Stage changes before the task is done	Old task auto-closes into history; the new stage creates the next task
Deal marked lost	All its open tasks auto-close with reason “Deal lost”
Same event fires twice	No duplicate: one open task per record and task type
On hold past the revisit date	Returns as active; if still unresolved, appears in the manager’s exceptions
Reassignment	Only to an eligible owner; the change is logged in history
Large overdue backlog	Today stays at 10; the Overdue tab holds the full list

07 How I’d know it worked

> **Primary metric:** % of sales tasks completed within their **original** target. Measuring against the original date, not a rescheduled one, stops “on time” being achieved by moving dates.

- % of new leads qualified within target
- % of quote follow-ups done on time
- Median age of overdue tasks
- **Guardrail:** % of tasks rescheduled more than twice or on hold past their revisit date, which catches work being hidden instead of done

Method: take a baseline before launch, then compare after rollout; where possible, compare a team using the To-Do with a similar team that doesn’t have it yet.

Revenue and deal closure depend on far more than this feature, so I’d track them as downstream outcomes, not as the result.

08 Validate before building, and what could go wrong

Validation plan

Shadow three salespeople for a day and note which records they actually act on and why. Review a month of CRM history to test the default targets. Test the Today screen as a clickable prototype with five reps before any build.

Risks and mitigations

Gaming reschedules: original-target metric and the guardrail · **Bad CRM data creates bad tasks**: stage hygiene checks before launch · **Alert fatigue**: four push triggers only · **Felt as surveillance**: workload view, no scores

> **The To-Do module should tell a salesperson what needs attention now, why, and what to do next, and give managers enough visibility to step in when work is stuck, without becoming another CRM or a tool for watching people.**

Rupak Ghanpathi · Independent product design case study: a concept, not a shipped product. Targets are configurable defaults; screens are low-fidelity illustrations; names and figures in examples are illustrative.