PRODUCT CASE STUDY · B2B SALES EXECUTION · RUPAK GHANPATHI

100 open leads. 10 actions today.

Due isn't the same as urgent. A mobile 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

> **Why it matters:** on a phone, a list of everything is a list of nothing. The quote that's going cold looks exactly like the 40 records around it, so the module acts as a layer on top of the CRM that surfaces only what needs action today.

THE RANKING RULE, 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 first: they hold up the deal

3 · Days overdue
Older before newer

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

Callbacks sit outside the ranking, pinned at the time the customer agreed. Future tasks wait in Inbox; nothing below the top 10 disappears.

DESIGN DECISIONS, AND WHAT THEY COST

1. **Rules, not AI, in V1.** Less clever ranking, but a salesperson can see why a task is on top, and trust it.
2. **Tasks close when the stage moves.** No asking someone to qualify a lead that's already qualified; the next task is created instead.
3. **Four push triggers only.** Morning summary, new P1, approval request, callback due. Fewer alerts, so the important one gets read.
4. **Workload view, not scores.** Managers see where work is stuck and rebalance it; V1 has no productivity rankings.

WORKED EXAMPLE

Task	Appears	Why
₹2L quote, sent 8 days ago	1st · P1	5 days past a 3-day target
₹5L approval, pending 3 days	2nd · P2	2 days past a 1-day target
₹50L new lead, today	3rd · P3	Due today; value doesn't lift it
₹20L quote, sent yesterday	Inbox	Follow-up date not reached
Callback requested today	Pinned	The customer's time decides

Built from my HDFC work

Ownership buckets taught me wrong owner → wrong manager view. A JIRA and ServiceNow MIS taught me managers act on exceptions, not every ticket.

How I'd know it worked

% of tasks done within their **original** target, so rescheduling can't fake "on time". Guardrail: tasks rescheduled 3+ times or stuck past their revisit date.

Validate first, then risks

Shadow three reps and prototype Today with five. Main risks: bad CRM data creating bad tasks, alert fatigue, and the tool feeling like surveillance.

Skills shown: problem framing · workflow and state design · prioritisation rules · edge cases · MVP scoping · success metrics and guardrails

Independent product design case study: a concept, not a shipped product. Targets are configurable defaults; examples are illustrative. Full 4-page case study available on request.