

PROJECT KICKOFF

LEAD MANAGEMENT SYSTEM LMS

A Centralized CRM & Sales Enablement Ecosystem for
Multi-Property Growth



PRESENTED BY

Umesh Vishwakarma

Senior Software Engineer & Tech Lead



PRODUCT OVERVIEW & VISION

— WHAT IS LMS?

A centralized platform designed to capture, manage, and convert leads across multiple properties and departments.



CENTRALIZE

Unify Web, Social, and Offline leads in one system.



CONVERT

Reduce lead-to-booking time with automation & workflows.



TRACK

End-to-end visibility from inquiry to revenue.



SCALE

Built for multi-property operations and distributed teams.

BUSINESS PROBLEMS SOLVED

! THE CHALLENGE



Scattered Leads

Leads lost across WhatsApp, Email, & Web forms.



Manual Delays

Slow, manual assignments increase response time.



Zero Accountability

No ownership; leads fall through the cracks.



Blind Spots

Guesswork in sales performance & pipeline.



No ROI Tracking

Cannot identify which marketing agencies bring revenue.



✓ THE LMS SOLUTION



Unified Capture

Centralized ingestion from all sources instantly.



Automated Distribution

Instant auto-assignment & SLA tracking.



Clear Ownership

Role-based access ensures 100% accountability.



Real-Time Visibility

Live dashboards replace manual guesswork.



Revenue Attribution

Track ROI by source, agency, and campaign.

ROLE-BASED ACCESS CONTROL

Security & Productivity tailored to the user



SYSTEM OWNER

SUPER ADMIN

Total control over masters, configurations, and global reports.



MANAGEMENT

REGIONAL MANAGER

Oversees assigned properties and tracks team performance metrics.



OPERATIONS

SALES USER

Handles daily leads, calls, and logs on-ground visits.



EXTERNAL

AGENCY USER

Submits leads directly into the system with limited tracking visibility.

DASHBOARD MODULE

Actionable Insights at a Glance



REAL-TIME INTELLIGENCE

01 LIVE SNAPSHOT ⚡

Real-time metrics for lead activity, revenue pipeline, and daily calling data updates.

02 GLOBAL FILTERS 🗑️

Quickly sort complex data by Property, Department, or specific Date Ranges instantly.

03 ROLE-SPECIFIC DATA 👤

Users only see what matters to their specific rank and region, ensuring data security.

04 OPERATIONAL HEALTH ❤️

Identify bottlenecks in the sales funnel visually without digging through spreadsheets.

LOCATION MANAGEMENT

Structured Geographic Intelligence



STRUCTURED HIERARCHY

Organized as Country → State → City to ensure pinpoint data accuracy for every operation.

DATA TAGGING

Every lead, company, and property is mandatorily mapped to a specific geographic location.

GLOBAL READY

Scalable architecture supports internationalization for seamless multi-country operations.

GEO REPORTING

Analyze sales performance and market penetration based on specific cities or regional clusters.

MASTER MANAGEMENT

— THE SYSTEM BRAIN

The "Brain" of the System:
Central configuration hub
that ensures
standardization and control
across the entire
ecosystem.



STANDARDIZATION

Centralized control for
Room Types, Rate Types,
and Designations.



CONSISTENCY

Changes here reflect
instantly across all modules
(Leads, Visits, etc.).



TEAM LOGISTICS

Define Team Groups and
Travel Modes for field staff
tracking.



EFFICIENCY

Reduce technical
dependency—admins can
update masters without
coding.



COMPANY & CONTACT MANAGEMENT

B2B RELATIONSHIPS

Building strong B2B connections with a centralized corporate repository and smart contact mapping.



CORPORATE REPOSITORY

Centralized database for corporate and institutional clients.



PARENT-CHILD GROUPS

Group multiple businesses under one parent corporate entity.



CONTACT BOOK

Map multiple decision-makers (HR, Admin, CEO) to a single company.



SMART ASSIGNMENT

Map specific "Area Users" to companies based on geography.



SALES VISIT MANAGEMENT

— TRACKING "FEET ON THE STREET"

Empower field teams with mobile-first tools to log visits, track expenses, and convert meetings into revenue instantly.



LOG ON-THE-GO

Sales reps record visit details, discussions, and outcomes instantly via mobile.



DIRECT CONVERSION

Create a lead or a PMS reservation directly from a visit log.



EXPENSE TRACKING

Capture travel mode, KM run, and lunch/entertainment costs.



VISIT INTELLIGENCE

Analyze visit frequency and conversion success per executive.

PROPERTY & STAFF MANAGEMENT

RESOURCES & UNITS

Centralized management of properties, staff hierarchies, and granular units for seamless operations.



MULTI-PROPERTY MAPPING

One agent can work across multiple hotels without duplicate accounts.



ESCALATION LEVELS

Automated Level 1, 2, and 3 alerts for unattended leads.



WEEKLY PLANNER

Managers can schedule and monitor field visits and follow-ups.



UNIT MAPPING

Granular control over individual Restaurants and Banquet halls.

LEAD MANAGEMENT (CORE ENGINE)

— THE HEART OF THE LIFECYCLE

A powerful central engine that automates lead ingestion, enforces strict ownership, and adapts dynamically to department needs.



OMNICHANNEL INGESTION

Facebook Ads, WhatsApp, Chatbots, and Web Forms flow in automatically.



STRICT OWNERSHIP

Only assigned agents can edit lead details; others have read-only access to prevent conflict.



DYNAMIC WORKFLOWS

Data collection forms adapt based on department (e.g., Rooms vs. Banquet leads).



COMMUNICATION

Integrated Airtel Cloud Calling with number masking and auto-recording capabilities.



PMS INTEGRATION & ROOM CHECK

— REAL-WORLD INVENTORY

Syncing with Real-World Inventory. Seamlessly connect your sales activities with your Property Management System to ensure accurate, real-time booking data.



LIVE AVAILABILITY

Check room status in real-time via integrated PMS.



TWO-WAY SYNC

Bookings made in LMS are saved directly to the PMS.



REVENUE MAPPING

Room revenue and taxes are automatically synced back to the lead.



ACCURACY

Eliminates manual data entry and human error in bookings.



REPORTS & ANALYTICS

Data-Driven Decision Making



STRATEGIC INTELLIGENCE

01 DISPOSITION REPORTS 🔍

See exactly where leads are getting stuck or converting to identify process gaps.

02 SOURCE ROI 📊

Identify which lead source (e.g., Facebook vs. Walk-in) is most profitable to optimize spend.

03 PERFORMANCE MATERIALIZATION 📈

Track actual revenue realized against sales effort to measure true team efficiency.

04 CUSTOM VIEWS 🗒️

Exportable summaries tailored for management meetings, audits, and performance reviews.

TECHNICAL ARCHITECTURE

Robust, Scalable, and Modern Infrastructure



BACKEND CORE

MVC

- > Built on **PHP CodeIgniter** Framework for stability and speed.
- > RESTful API architecture for seamless data flow.
- > Modular design for easy scalability.



INTEGRATIONS

API

- ✓ **Messaging:** WhatsApp Business (ORAI)
- ✓ **Social:** Facebook Lead Ads (Pabbly)
- ✓ **Voice:** Airtel Cloud Calling
- ✓ **PMS:** 2-way reservation sync



DATA LAYER

SQL

- ≡ Reliable **MySQL** Relational Database.
- ≡ Optimized indexing for fast query performance.
- ≡ Automated daily backups and redundancy.



SECURITY

SEC

- 🔒 **SSL-protected** data transmission.
- 🔒 Secure Linux-based hosting environment.
- 🔒 Role-based data encryption & access logs.



KEY BUSINESS BENEFITS

— WHY CHOOSE LMS?

LMS transforms raw data into a scalable revenue engine, ensuring accountability and measurable growth.



ZERO LEAKAGE

No lead is ever lost. Omnichannel capture ensures 100% data retention.



FASTER RESPONSE

Automation cuts response time by more than 50% vs manual methods.



IMPROVED ROI

Allocate budget effectively to lead sources that actually convert.



TRANSPARENCY

Total accountability for sales staff and third-party agencies.



REVENUE GROWTH

Better tracking leads directly to higher materialization and sales performance.



SEAMLESS INTEGRATIONS

Connecting the LMS to Your Digital Ecosystem



MESSAGING & CHAT

API V2.0

WhatsApp Business (via ORAI)

Automated conversational AI integration for instant lead engagement, query resolution, and zero-delay responses directly on WhatsApp.



SOCIAL INGESTION

WEBHOOK

Facebook & Instagram (via Pabbly)

Real-time capture of leads from Facebook Ads, Lead Forms, and social campaigns, instantly creating records in the CRM pipeline.



CLOUD TELEPHONY

VOIP

Airtel Cloud Calling

Integrated click-to-call functionality featuring number masking for privacy, automatic call recording, and detailed duration analytics.



PROPERTY MANAGEMENT

2-WAY SYNC

Core PMS Integration

Live inventory availability checks and automated reservation pushing to the PMS, eliminating manual data entry errors and overbooking.

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MORE THAN JUST A TOOL— A COMPLETE SALES ECOSYSTEM.

The LMS transforms raw data into Revenue. By automating the "busy work," your team can focus on what they do best: Closing Deals.

THANK YOU!

Umesh Vishwakarma

SENIOR SOFTWARE ENGINEER & TECH LEAD