



AN AI INNOVATION VENTURE BY CREATORS TOUCH

LEAD PIPELINE & FOLLOW-UP SYSTEM

Spark CRM

Never lose a lead again

Most leads are not lost to competitors. They are lost to a second follow-up that nobody made.

SUBSCRIPTION

MONTHLY

YEARLY

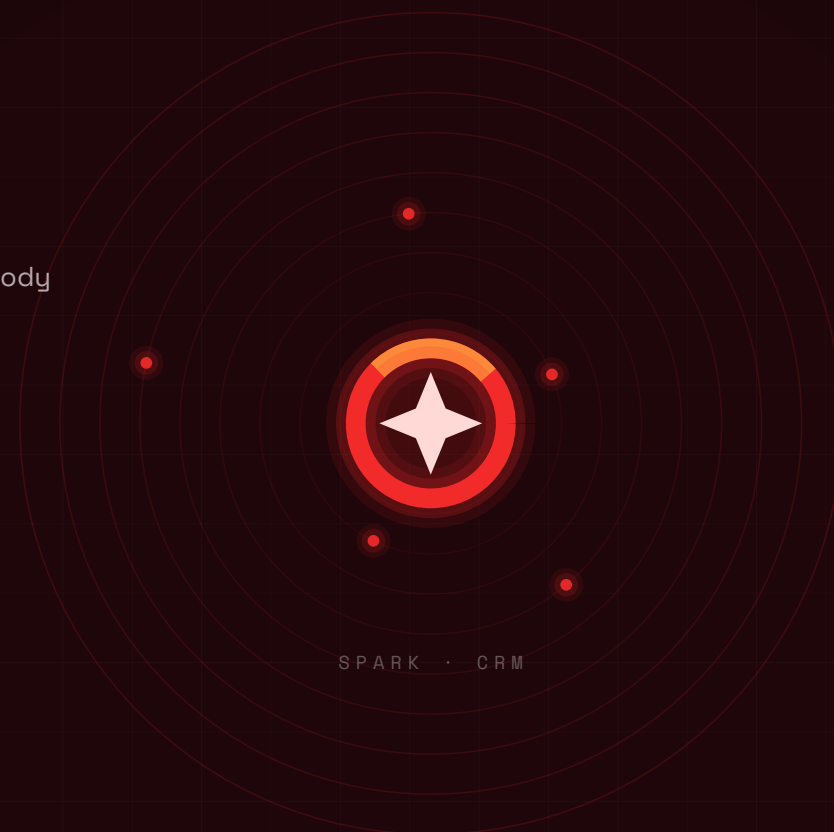
INDIVIDUAL

PRODUCT DEMO PACKAGE

15 pages — problem, design, architecture, interface, rollout

sparkopus.com/products

Confidential — prepared for your evaluation



02

CONTENTS

WHAT'S IN THIS PACKAGE

A fifteen-page walkthrough of Spark CRM: the problem it removes, how SPARK OPUS designed and engineered it, exactly what it looks like in use, and what it takes to get you live.

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1 pipeline

EVERY CHANNEL

Calls, forms, WhatsApp, ads and walk-ins land in one queue.

< 1 min

CAPTURE TO ASSIGNED

A new lead reaches a named owner before it can go cold.

0

LEADS WITHOUT A NEXT STEP

Every open lead carries a scheduled action and a due...

AT A GLANCE

Spark CRM

Never lose a lead again

BUILT FOR

Sales teams, agencies, real estate, education, healthcare, B2B services

RUNS ON

Web app, mobile-friendly, WhatsApp and web-form capture

DATA IT HOLDS

Leads, activities, assignments, stages, deals, reports

LANGUAGES

English interface; customer-facing messages multi-language

TIME TO LIVE

1–2 weeks including data import

OWNERSHIP

Your pipeline, your contacts, full export at any time

PRICING

Monthly or discounted yearly. Individual & team plans.

MONTHLY

YEARLY

INDIVIDUAL

TEAMS

03 — THE PROBLEM

THE PROBLEM IT REMOVES

Lead leakage is quiet. Nothing crashes, nobody complains, and the monthly number is simply lower than the enquiry count says it should be. The leak is almost always between capture and the second follow-up.

01

Leads arrive in six different places

Website form to an inbox, ad leads in a dashboard, WhatsApp on a personal phone, calls in a notebook. There is no single queue, so there is no single truth.

02

Nobody owns the new lead

When a lead belongs to everyone it belongs to nobody. The first hour — the hour that matters most — passes while it waits to be noticed.

03

The second follow-up never happens

The first call is easy to remember. The one four days later, after a 'call me next week', is the one that closes — and the one that gets forgotten.

04

Status lives in people's heads

'What happened with that enquiry?' costs a meeting. Nobody can see the pipeline without asking the person who owns it.

05

Reporting is a monthly reconstruction

Numbers are assembled from memory and spreadsheets, arrive late, and are too coarse to change anything.

WHAT IT COSTS RIGHT NOW

6 places

LEADS CURRENTLY LIVE

Every extra inbox is another place a lead can quietly die.

Hours

BEFORE FIRST CONTACT

The gap between enquiry and first call is where intent...

Monthly

VISIBILITY, AT BEST

By the time the report exists, the month is already spent.

04 — THE ALTERNATIVES

WHY THE USUAL FIXES FAIL

Every business we onboard has already tried at least two of these. The pattern is consistent: the tool is not wrong, it is unfit for the way the team actually works.

WHAT BUSINESSES TRY	WHAT ACTUALLY HAPPENS	WHY IT BREAKS
A shared spreadsheet	Columns for name, number, status and 'remarks'.	No reminders, no ownership, no history — and two people overwrite each other.
An enterprise CRM	A powerful platform with sixty fields per lead.	Reps stop updating it within a month, and stale data is worse than none.
WhatsApp groups for leads	New enquiries are forwarded into a team group.	A group is a feed, not a queue. Nothing is assigned, tracked or closed.
The rep's own notebook	Each person runs their own private system.	The pipeline walks out of the door when they do.
Nothing formal	Good people, good memory, high pressure.	It works up to a volume, then fails silently and exactly at the moment of growth.

THE GAP

The requirement is a system light enough that a busy rep will actually keep it current, and strict enough that no lead can sit without an owner and a next step.

SPARK OPUS BUILT SPARK CRM TO CLOSE EXACTLY THIS GAP.

05 — THE SOLUTION

WHAT WE BUILT INSTEAD

IN ONE PARAGRAPH

Spark CRM funnels every channel into one pipeline, assigns each lead to a named human within a minute, and refuses to let an open lead exist without a scheduled next action. Reporting is a by-product of the work, not a separate exercise.

01

One queue, every source

Web forms, WhatsApp, ad platforms, phone and walk-ins all become the same kind of record with the same rules.

02

Ownership within the minute

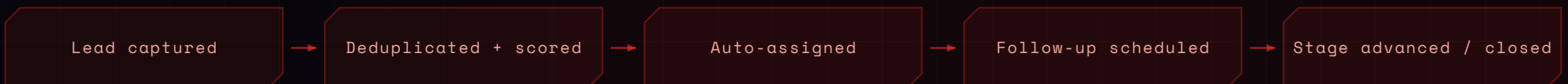
Round-robin, territory or skill-based assignment puts a name and a deadline on every lead the moment it lands.

03

Follow-ups that chase you

The system carries the memory. Every open lead has a due action; overdue actions escalate rather than disappear.

THE LOOP IT RUNS, EVERY TIME



WHERE WE DREW THE LINE

What it deliberately does not do: demand sixty fields before a rep can save a lead, auto-message your prospects without your approval, or bury the pipeline behind reports nobody opens.

06 — DESIGN

HOW SPARK OPUS DESIGNED IT

We designed Spark CRM against a hard constraint: a rep between two site visits, on a phone, with one hand free, must be able to log an outcome in under fifteen seconds. Everything else follows from that.

P 1**Fifteen seconds to update**

Logging an outcome must be faster than not logging it. If a field slows that down, it is optional or it is inferred.

P 2**A lead is never idle**

Open leads always carry a next action and a due date. 'No next step' is treated as a data error, not a state.

P 3**The pipeline is the report**

Managers read the same live board reps work in. There is no separate reporting reality to reconcile.

P 4**Import your mess as-is**

Onboarding accepts the messy spreadsheet you actually have. Cleaning happens inside the system, not as a prerequisite.

THE PROCESS WE RAN

01**Map the sources**

We list every route a lead currently takes into your business, including the informal ones.

02**Define the stages**

Your real sales stages — not a textbook funnel — with entry and exit criteria in plain words.

03**Assignment rules**

Round-robin, territory, product or seniority, plus what happens when someone is on leave.

04**Pilot with one team**

One squad runs live for a week while the old sheet keeps running beside it.

05**Roll out and tune**

Reminder timing, stage definitions and reports adjusted from real usage data.

07 — ARCHITECTURE

HOW SPARK OPUS BUILT IT

The engineering effort sits in three places: reliable capture, deduplication, and a scheduler that never drops a reminder. Those are the parts that make or break trust in a CRM.

THE SYSTEM, LAYER BY LAYER

CAPTURE

Web-form endpoint, WhatsApp intake, ad-platform webhooks, CSV import and a fast manual-add for walk-ins and calls.

NORMALISATION

Phone and email canonicalisation, fuzzy deduplication against existing records, source attribution and tagging.

ROUTING

Assignment engine: round-robin, territory, product-skill and load-aware, with holiday and out-of-office fallbacks.

ACTIVITY ENGINE

Scheduled follow-ups, overdue escalation, activity timeline, notes, call and message outcomes.

PIPELINE

Configurable stages, deal values, win/loss reasons, and stage-transition rules with an immutable history.

REPORTING

Live funnel, source performance, rep leaderboard, ageing and conversion analytics, plus scheduled exports.

WHAT IT IS MADE OF

FRONTEND

Vue / Nuxt app

Mobile-first board

Offline-tolerant forms

Keyboard-fast entry

CORE

Assignment engine

Dedup service

Scheduler + escalation

Immutable activity log

SERVICES

Node / Nitro APIs

MongoDB

Job runner

Signed webhook intake

INTEGRATIONS

WhatsApp

Web forms

Ad-platform leads

CSV / Sheets export

NOTE 01

Deduplication runs at capture, not as a cleanup job — a returning enquiry attaches to its existing record with its full history intact.

NOTE 02

The activity log is append-only. Stage changes, reassignments and edits are all recoverable, which is what makes disputes resolvable.

NOTE 03

Reminders are durable scheduled jobs with escalation: an overdue action climbs to the manager's view rather than fading from a list.

08 — FEATURE DEEP DIVE

FEATURE DEEP DIVE — 1 OF 2

Every feature on the product page, taken apart: what it does, how we engineered it, and the business reason it exists.

Capture leads from all channels

WHAT IT DOES

Website forms, WhatsApp, ad platforms, phone calls, walk-ins and bulk imports all land in one pipeline.

HOW WE BUILT IT

Signed webhook endpoints plus a fast manual-add path, normalised into a single lead schema with source attribution.

WHY IT MATTERS

One queue means one truth. Nothing can be lost in a channel nobody is watching today.

Follow-up reminders

WHAT IT DOES

Every open lead carries a scheduled next action; overdue actions escalate to the manager's view.

HOW WE BUILT IT

Durable scheduled jobs with escalation rules, surfaced as a daily 'due today' list per rep.

WHY IT MATTERS

Deals close on the second and third contact. This is the single feature that recovers the most revenue.

Team assignment

WHAT IT DOES

New leads route automatically to the right person by rotation, territory, product or current load.

HOW WE BUILT IT

A rules engine evaluated at capture time, with leave and out-of-office fallbacks so a lead never waits on an absent rep.

WHY IT MATTERS

Ownership within the minute — the first hour is where conversion is won or lost.

09 — FEATURE DEEP DIVE

FEATURE DEEP DIVE — 2 OF 2

The second half of the feature set — the parts that turn a working system into a compounding one.

Status tracking

WHAT IT DOES

A visual pipeline of your real stages, with an immutable history of every movement and outcome.

HOW WE BUILT IT

Configurable stages with entry criteria, drag-to-advance on the board, and an append-only transition log.

WHY IT MATTERS

'What happened to that enquiry?' becomes a two-second lookup instead of a meeting.

Reports

WHAT IT DOES

Live funnel, conversion by source, rep performance, ageing leads and win/loss reasons.

HOW WE BUILT IT

Aggregations computed directly from the pipeline and activity log, with scheduled email and CSV export.

WHY IT MATTERS

Decisions about spend and staffing get made on this month's data, not last month's memory.

No lost leads

WHAT IT DOES

Structural guarantees: nothing unassigned, nothing without a next step, nothing silently ageing out.

HOW WE BUILT IT

Automated audits flag unowned leads, missing actions and stalled stages into a daily exceptions queue.

WHY IT MATTERS

The promise of the product is enforced by the system rather than by anyone's diligence.

10 — INTERFACE

WHAT IT LOOKS LIKE

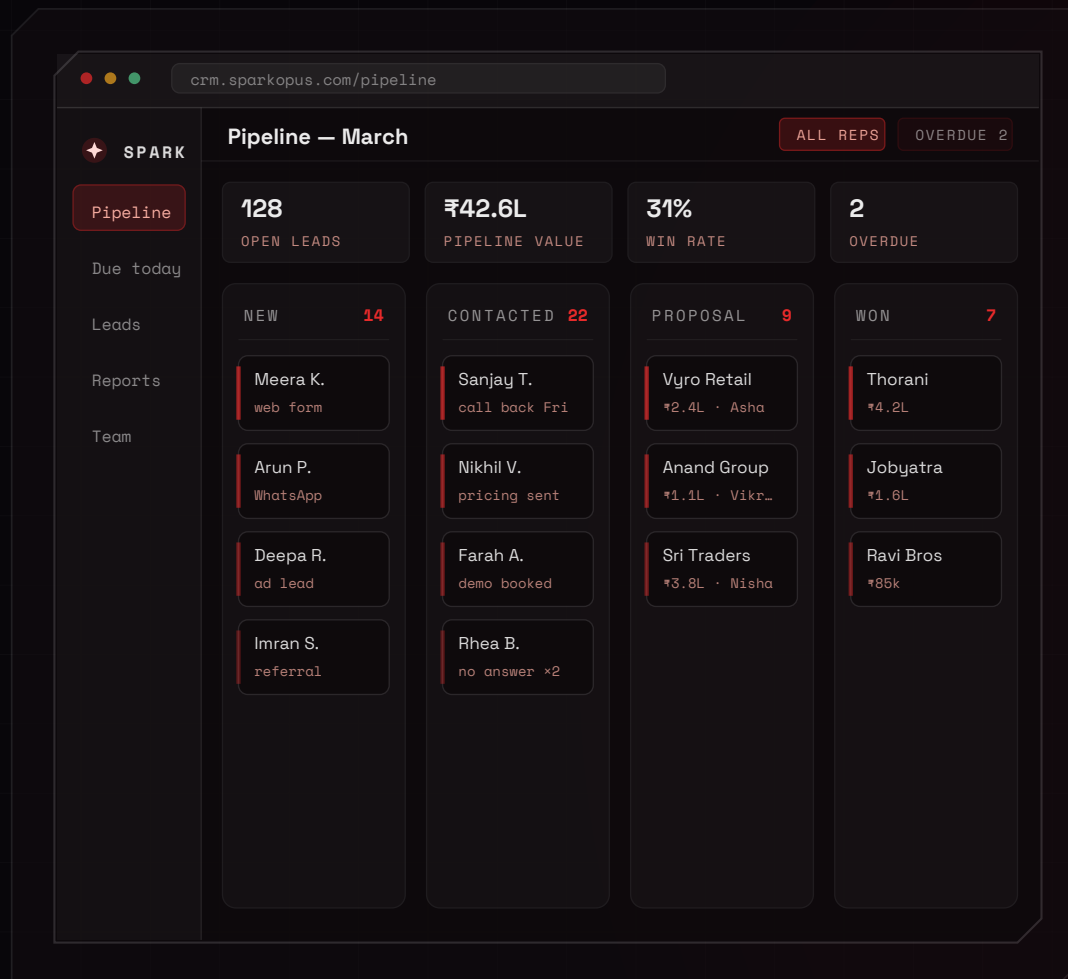
The pipeline board: every lead, its owner, its stage and its next action — the same screen reps work in and managers read.

WHAT'S HAPPENING ON THIS SCREEN

- **Source on every card**
Where the lead came from travels with it, so channel performance is a fact rather than an estimate.
- **Owner and due date**
No card exists without a name and a next action. Overdue cards surface in red.
- **Drag to advance**
Stage changes are one gesture, and every movement is written to an immutable history.
- **Live totals**
Stage counts and values update as the board is worked — the report is the pipeline.

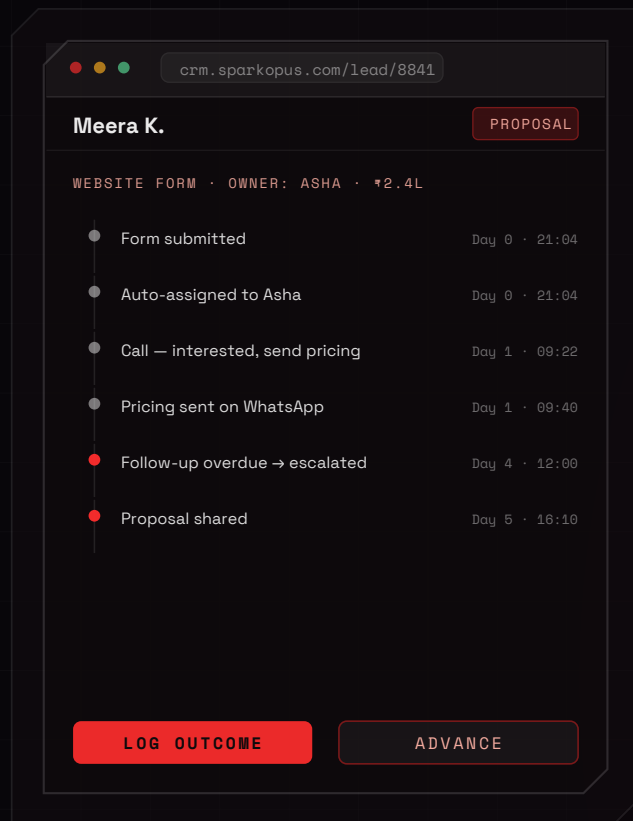
NOTE

These are design representations of the shipped interface. Final screens carry your brand, your terminology and your catalogue.

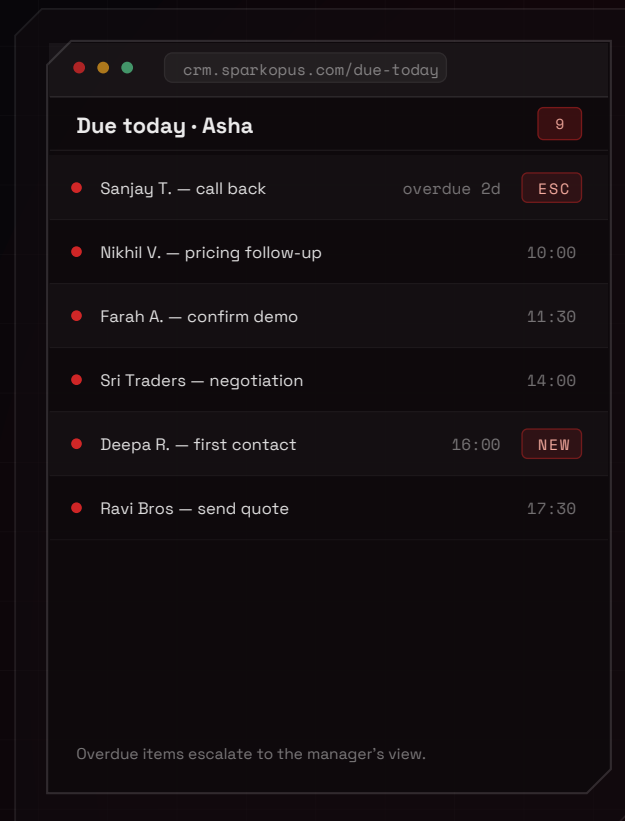


11 — INTERFACE

THE SUPPORTING SCREENS



01 Lead detail — the full timeline: every call, message, note and stage change in one scroll.



02 Due today — each rep's working list, ordered by urgency, with overdue items escalating to the manager.



03 Reports — conversion by source and by rep, ageing analysis and win/loss reasons, exportable.

12 — IN PRACTICE

A DAY IN THE LIFE

One lead, from a 9pm form submission to a closed deal eleven days later — and the three moments the system prevented a loss.

21:04

Captured

A website form submits. The lead is normalised, deduplicated against existing records and tagged to its campaign.

21:04

Assigned

Round-robin routing gives it to the on-duty rep with a first-contact action due at 09:30.

09:22

First contact

The rep calls, logs 'interested, send pricing' in twelve seconds, and the system schedules the follow-up.

Day 4

Save #1

The follow-up goes overdue at noon and escalates to the manager's exceptions list. It is actioned that afternoon.

Day 7

Save #2

The prospect messages the WhatsApp number instead. Deduplication attaches it to the same record — no duplicate, no lost context.

Day 11

Closed won

Stage advances to won with a value and a reason. The funnel report updates immediately.

WHAT THAT ADDS UP TO

Nothing here required extra discipline from the rep. The saves came from assignment rules and a scheduler that treats an unattended lead as an error condition.

INTEGRATIONS, DATA & SECURITY

It has to fit the tools you already run, and it has to be safe with the data you are handing over. Both are product requirements, not afterthoughts.

CAPTURE

- Website forms
- WhatsApp / SparkObot
- Ad-platform lead forms
- CSV & Sheets import

COMMUNICATION

- WhatsApp templates
- Click-to-call logging
- Email follow-ups
- SMS

SPARK ECOSYSTEM

- SparkObot handoff
- Appointment of Opus
- Socialopus lead capture
- SparkPOS customers

EXPORT

- CSV / Excel
- Google Sheets sync
- Scheduled email reports
- API access

HOW YOUR DATA IS HANDLED

S1

Role-based visibility

Reps see their own leads; managers see the team; owners see everything. Configurable per role.

S2

Append-only history

Edits, reassignments and stage changes are logged with who and when — disputes are resolvable.

S3

Export on demand

Your pipeline is yours. Full export in a standard format, whenever you ask, without friction.

S4

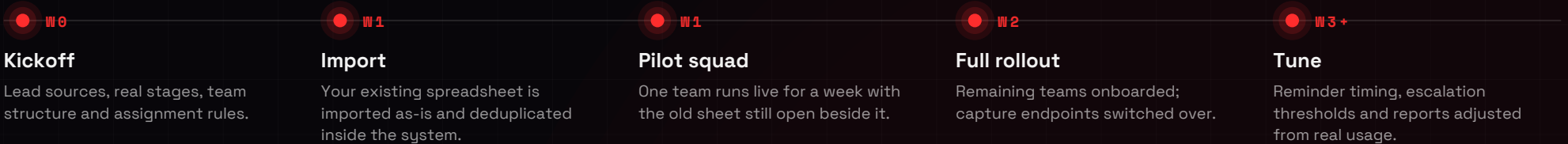
Contact-data hygiene

Deduplication and opt-out flags are respected across every outbound channel.

14 ROLL OUT

HOW WE GET YOU LIVE

The risk in a CRM rollout is adoption, not installation. Our sequence is built to earn the reps' trust in week one, because a CRM nobody updates is worse than a spreadsheet.



WHAT'S INCLUDED, AT NO EXTRA COST

- Lead-source audit and mapping
- Pipeline and stage configuration
- Data import with deduplication
- Assignment and escalation rules
- Rep training (30 minutes, once — by design)
- Manager reporting setup
- Capture endpoint integration
- Monthly review of pipeline health

AND AFTER YOU'RE LIVE

Named contact

Someone who knows your stages and your team structure.

Rule changes

New territories, products or team members configured with you.

Adoption check

We watch update rates in month one and fix the friction, not blame the rep.

WHAT GOOD LOOKS LIKE

< 1 min

CAPTURE TO OWNER

Design target for automatic assignment...

0

UNOWNED OPEN LEADS

Enforced by a daily automated...

100%

LEADS WITH A NEXT STEP

An open lead without a scheduled action...

Live

FUNNEL VISIBILITY

The pipeline is the report — no monthly...

	HOW IT WORKS TODAY	WITH SPARK CRM
Where leads live	Six inboxes and a notebook	One pipeline with source attribution
Ownership	Whoever notices first	Assigned automatically within a minute
Second follow-up	Remembered, or not	Scheduled, and escalated when overdue
Pipeline visibility	Ask the rep	A live board anyone authorised can read
Reporting	Assembled monthly from memory	Generated continuously from the work itself

These are engineering targets we design and monitor against, not a guarantee of business results. We baseline your current capture-to-contact time and follow-up completion in week one so gains are measured against your own starting point.

PRICING

Individual A single seat for a solo operator or consultant, with the full pipeline and reminders.

Teams Multi-user with assignment rules, role-based visibility and manager reporting.

Monthly / Yearly Either plan monthly with no lock-in, or yearly at a discount with quarterly reviews.

NEXT STEPS

01 Discovery call

Twenty minutes on your lead sources, team structure and where deals stall.

02 Import your sheet

We load your real data and show you your own pipeline, deduplicated.

03 Pilot week

One squad runs live while the old system stays open as a safety net.

04 Roll out

Remaining teams, capture endpoints and reporting.



You will see your own leads on your own board before you are asked to commit to anything.

hello@sparkopus.ai

sparkopus.com/contact — or tap “Call back in 2 mins”