DemandFlow CRM and Outbound Campaigns

DEMANDFLOW®

Contacts, accounts, leads, deals, quotes and outbound email in the same platform as the services you sell and the projects that deliver them

DATA SHEET

Most sales teams run on a CRM that knows nothing about the business behind the deal. The pipeline sits in one tool, the outbound sequences in another, the quote in a document, the signature in a third service, and the customer's services, contracts and projects somewhere the sales team cannot see. Every handover is a re-key, and every forecast is a spreadsheet.

DemandFlow® keeps the whole commercial record in one place: the company, its contacts and the account overlay that scores and stages it; the leads that come in from web forms; the deals moving through pipelines with their stage history, products and versioned quotes; the calls, meetings and emails logged against them; and the outbound campaigns that fill the top of the funnel from your own Microsoft 365 mailboxes. A won deal becomes the customer whose service contracts roll up to ARR and whose projects and services sit on the same record.

What it is

A CRM and outbound campaign module inside DemandFlow: companies, accounts, contacts, leads, pipelines, deals, deal products, quotes, activities, notes, static and smart lists, scoring rules, sales quotas, lead forms, lead sources and email templates. On top of the records sit My day, a deals kanban with a KPI strip, a pipeline dashboard, a forecast against quota, a lead funnel, duplicate merging, a timeline on every contact, company, lead and deal, and email sent from the user's own Microsoft mailbox and logged as an activity.

Outbound campaigns send a first email and up to three follow-ups to a list, from connected Microsoft 365 email accounts with daily caps, send windows, gaps and ramp-up, and detect replies and bounces from the mailbox itself so a sequence stops the moment a prospect answers.

What a sales team gets

- **A day that starts organised.** My day lists each owner's due and overdue follow-ups, overdue tasks and new replies, with Done and Snooze on the row; a daily reminder arrives in the app at 06:30.
- **A pipeline you can read at a glance.** The kanban shows open pipeline, weighted forecast, won this quarter, stalled deals, deals past their close date and the 90-day win rate above the stage columns.
- **A forecast against quota.** Weighted pipeline by month and by owner against sales quotas, with a stale deals tab to clear before the review.
- **Leads that score themselves.** Rule-based fit and engagement points score open leads and accounts every night and band them hot, warm or cold.
- **Quotes signed without leaving the deal.** A versioned quote from the deal's products, a PDF, and Send for signature through DemandSign with the deal contact as signer.
- **Outbound that stops on reply.** Up to four steps in the same Outlook thread, replies and bounces detected from the mailbox, the owner told in the app and the recipient taken out of the sequence.
- **Compliance built into the send.** Opt-outs always win, tenant daily caps apply, sole traders and recipients without a company need express consent, and Check a send shows who would be skipped before a bulk email goes.
- **One record from first touch to ARR.** The lead converts to a contact, account and deal; the won deal's customer carries service contracts whose lines roll up to ARR, with customer reporting and QBR on the same record.

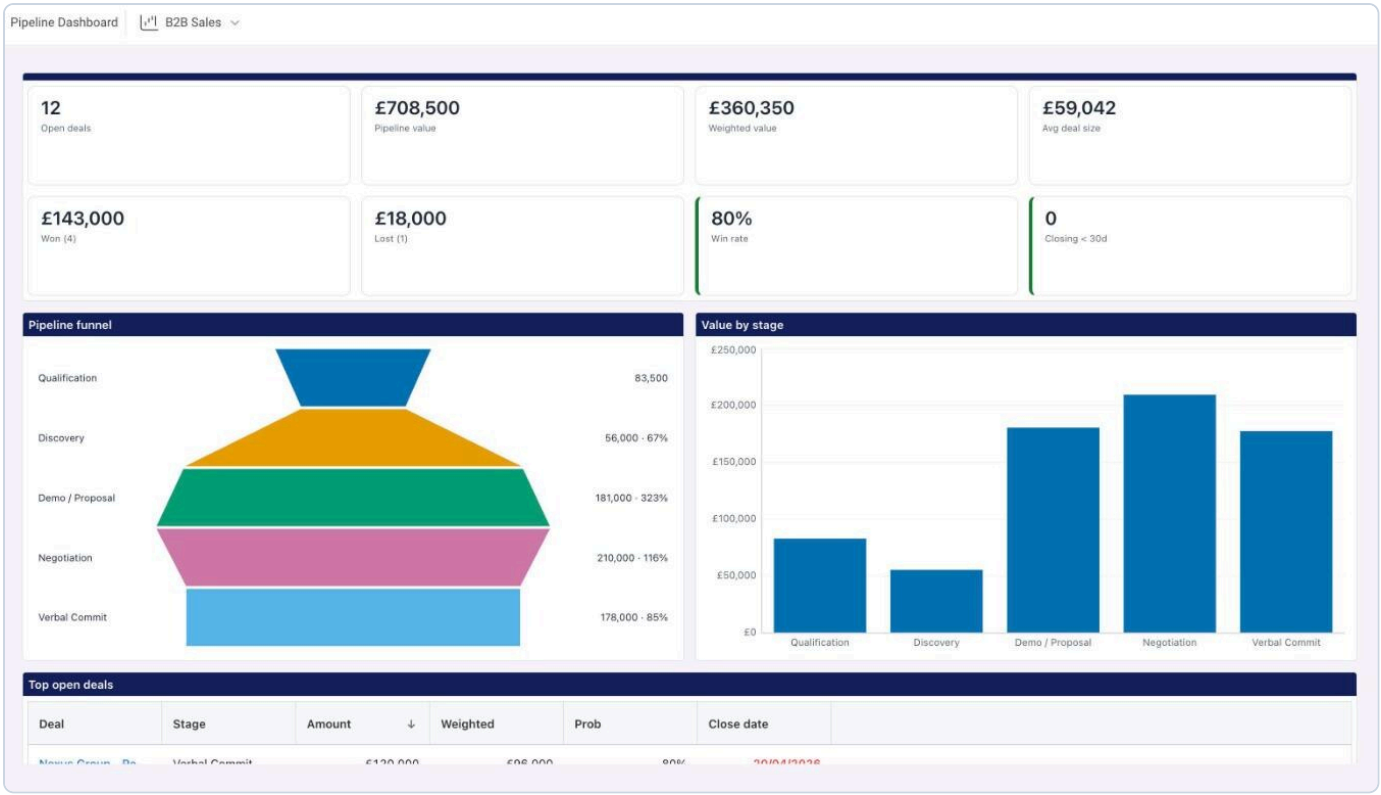


FIGURE 1. THE PIPELINE DASHBOARD: 12 OPEN DEALS WORTH 708,500 GBP, WEIGHTED TO 360,350, WITH AVERAGE DEAL SIZE, WON, LOST AND AN 80 PER CENT WIN RATE, THE FUNNEL BY STAGE AND THE VALUE HELD AT EACH STAGE

Companies, contacts and leads

A company carries its owner, parent company, industry, website, LinkedIn page, whether it is a sole trader, when it was last contacted and when the next follow-up is due. The account overlay adds the sales view: account owner, status (prospect, qualified, active, nurture, churned or dormant), account type, lead source and account score. A client is the company you serve, with client status, owners, credit and billing, and an ARR figure taken from its service contracts or entered by hand. Customer reporting shows each client's project KPIs, RAID, financials, milestones and timeline, with a QBR launcher on the toolbar.

A contact belongs to a company and holds name, job, email, phone, do-not-call, social profiles, persona, seniority, likelihood to buy, marketing opt-out, consent basis and the source it came from. Save hooks on every activity keep last contacted and next follow-up current on the contact and the company without anyone editing them.

Leads. A lead extends a contact with a status (new, contacted, qualified, proposal, won, lost, disqualified or converted), source, form, territory, score and band. Convert lead creates the contact, account and deal and marks the lead as converted and linked; nothing is deleted. The funnel report shows where leads sit and where they stall.

Web-to-lead. A lead form defines its fields, consent text and basis, lead source, owner and territory, with a captcha provider, a per-hour limit, allowed domains and a redirect page. Embed code with a live preview drops it into any website; a submission creates the contact and lead with consent captured, and a repeat submission for an open lead logs an activity instead of a duplicate.

Duplicates. Likely duplicate contacts and companies are shown side by side and merged in one action, keeping activities, deals and list memberships; the losing record becomes a pointer, never a deletion.

Prospecting. Find people on a list by department, seniority and job-title words through Hunter.io, verify emails in bulk, and have every result stamped with its source, consent basis, confidence and verification status.

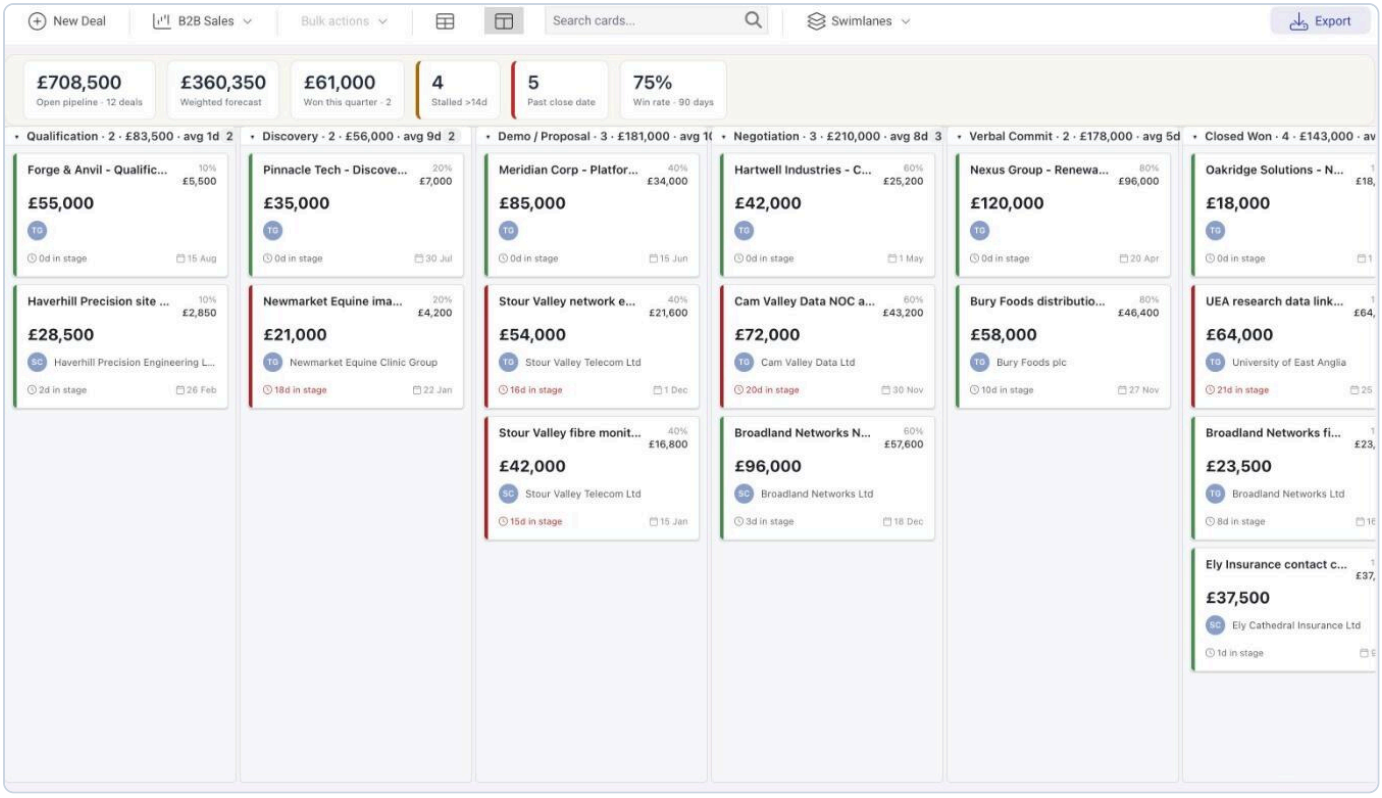


FIGURE 2. THE DEALS KANBAN: OPEN PIPELINE, WEIGHTED FORECAST, WON THIS QUARTER, STALLED, PAST CLOSE DATE AND WIN RATE ABOVE THE QUALIFICATION, DISCOVERY, DEMO/PROPOSAL, NEGOTIATION, VERBAL COMMIT AND CLOSED WON COLUMNS, EACH CARD SHOWING PROBABILITY, WEIGHTED VALUE, COMPANY, DAYS IN STAGE AND CLOSE DATE

Pipelines, deals and quotes

A pipeline defines its stage columns, each with a probability and won or lost flags, its swimlanes and its own custom fields, so an SMB quick-close pipeline and an enterprise pipeline can run side by side with different stages and different fields. A deal belongs to a pipeline and an account and records its type (new business, renewal, upsell, cross-sell or resourcing), priority, source, amount, probability, primary contact, champion, decision maker, originating lead, owner, close date, and on closure its won or lost date and lost reason. A resourcing deal names the client, start date and duration for the people it will place.

Every stage change writes a stage history row with days in stage, which is what the kanban's stalled count, the deal health score and the forecast's stale deals tab read. Deal products carry quantity, unit price, discount, line total and whether the line recurs.

Deal page. The stage track across the top, the amount, weighted value, probability from the stage, close date and owner; a deal health score with days in stage, last contact, activities in the last 30 days and whether a champion is identified; a next best action; recent activity; deal details; team and key dates; and a Conversation panel to send an email, write an internal note or log a call without leaving the page.

Pipeline dashboard and forecast. Per pipeline, the KPIs, the funnel, the stage breakdown and the top and overdue deals. The forecast shows weighted pipeline by month and by owner against each owner's monthly or quarterly quota in amount and deal count.

Quotes. Create quote on the deal builds a versioned quote from the deal products with a status of draft, sent, accepted, rejected, superseded or expired, its lines, totals and a PDF. Send for signature raises a DemandSign envelope with the deal contact as signer; Refresh signature writes the outcome back onto the quote.

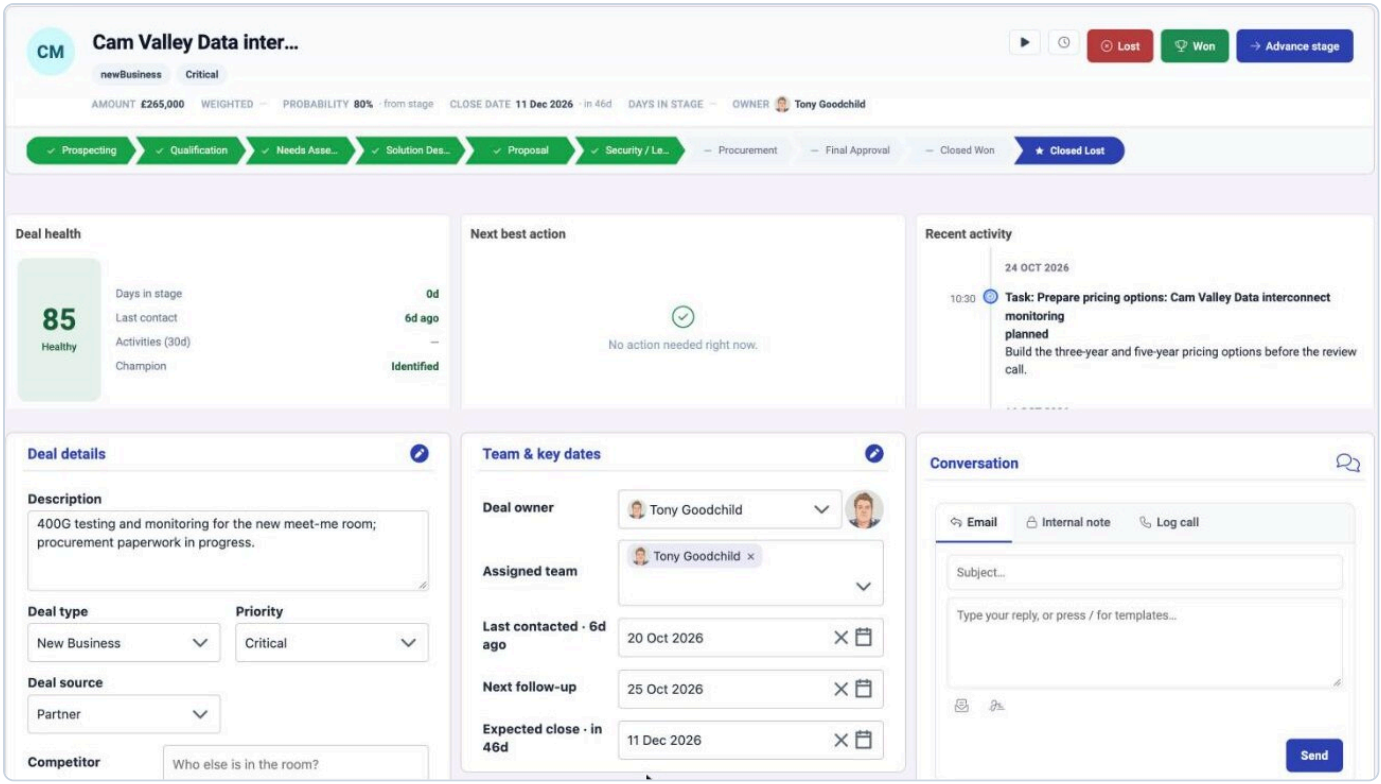


FIGURE 3. A DEAL: THE STAGE TRACK, AMOUNT, PROBABILITY, CLOSE DATE AND OWNER; DEAL HEALTH AT 85 HEALTHY WITH DAYS IN STAGE, LAST CONTACT, ACTIVITIES AND CHAMPION; NEXT BEST ACTION, RECENT ACTIVITY, DEAL DETAILS, TEAM AND KEY DATES, AND THE CONVERSATION PANEL FOR EMAIL, INTERNAL NOTE AND LOG CALL

Activities, email and calendar

An activity is a call, meeting, email, task, demo, proposal or note against a deal, contact, company or lead, with its date, duration, status (planned, completed or cancelled), outcome, direction and next step. The timeline on every contact, company, lead and deal merges activities, tracked emails, message events, notes, stage changes and the activity stream into one feed, with a composer at the top for an email, a logged call or a note.

Email goes from the user's own Microsoft mailbox through Microsoft Graph and is written back as an email activity on the record; inbound replies arrive through a Graph notification and opens are recorded. Email templates cover marketing and transactional messages.

Calendar sync. Each user connects their Microsoft 365 or Google calendar with the tenant's own app credentials from a panel on their profile. Meetings with matched contacts become meeting activities on the contact, marked with their source, kept current by delta sync.

Scoring. Scoring rules target leads or accounts on a fit or engagement dimension and award points for a field value, an activity, a message, recency or an open deal within a window of days. A nightly run at 02:15 scores every open lead and account and writes the score and band straight onto the record.

Lists. A list holds contacts, companies or leads, either static or smart from rules. From a list: create a task for every member, find people through Hunter, and Check a send to see who the guard would skip before a bulk email.

Outbound campaigns

A campaign targets a list, optionally narrowed by role words, and sends from one email account or a group of them with a per-mailbox daily cap and a start time. Its page has tabs for Audience, Steps, Schedule and accounts, Launch and Results, with preview, test send,

Replies and bounces. A Graph subscription on each active or paused account, renewed every six hours, delivers inbound mail to DemandFlow. A reply or a bounce marks the recipient, adds an activity to the

launch, pause, resume and stop. The engine ticks every minute; only a draft or scheduled campaign can be launched, and a campaign moves through draft, scheduled, running, paused, finished and stopped.

Steps. One first email and up to three follow-ups, each with a delay in days, a subject and a body. Same thread keeps the follow-ups in the same Outlook conversation as the first email, so a prospect sees one thread, not four messages. Stop on reply is always on.

Email accounts. Connect a Microsoft 365 mailbox with OAuth, set the from and reply-to addresses, who may use it, its daily cap, minimum and maximum gap between sends, send window days and hours, time zone and ramp-up. Check health reports the token, SPF, DKIM, DMARC and the seven-day bounce rate; an account that goes wrong is paused automatically with the reason shown.

contact, sends the campaign owner an in-app message and updates the campaign counters. No polling, no shared inbox to watch.

Results. Each campaign counts recipients, sent, replied, bounced, opened, clicked, unsubscribed and skipped, with open and click tracking switched on per campaign when wanted. Each recipient shows its status, current step and next send time.

Consent and unsubscribe. Every send passes the guard: opt-outs win over everything, the tenant daily cap applies, a sandbox tenant redirects to its admin, marketing to Australia and New Zealand needs consent, and sole traders and recipients without a company need express consent. An unsubscribe link records the opt-out on the address and the contact; STOP replies do the same for SMS and WhatsApp.

Verify before send. A campaign can verify each address before the first email leaves, so bad addresses are skipped rather than bounced.

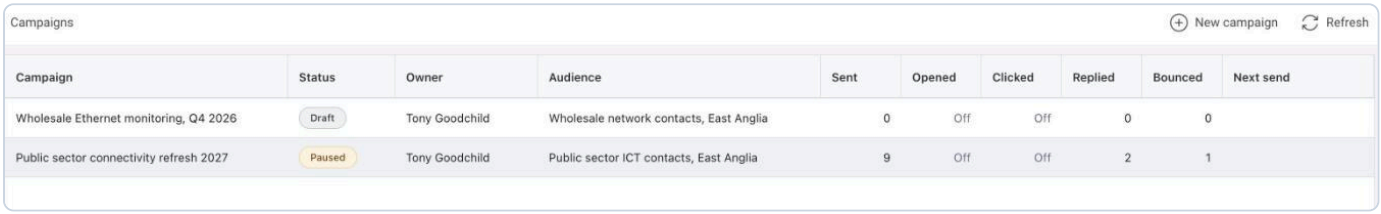


FIGURE 4. THE CAMPAIGNS LIST: EACH CAMPAIGN WITH ITS STATUS, OWNER, AUDIENCE, SENT, OPENED, CLICKED, REPLIED, BOUNCED AND NEXT SEND

Connected to the rest of the business

Companies can be pushed to HubSpot from a bulk action or an automation using a Private App token, and accounts can be pulled from Dynamics 365 with their related entities into clients and lookups. Integration flows read and write CRM records alongside every other entity in DemandFlow.

A won deal's client holds its service contracts, whose lines roll up to ARR on the client record. The customer services it buys sit in the network model, so a network change lists the customers and services it affects, and customer reporting shows the client's projects, financials and milestones on the same page as its deals.

Every CRM record is a DemandFlow record: the same automations, imports, REST API, webhooks and assistant tools apply, and a resourcing deal, a quote and a DemandSign envelope are the same objects the delivery, finance and e-signature modules use. The pure logic behind My day, duplicates, forecasting, scoring, conversion, the send guard and the campaign planner lives in 22 tested modules, so the numbers on the screen are the numbers in the tests.

Summary of specifications

Item	Detail
Records	Company, account overlay, client, contact, lead, pipeline, deal, deal stage history, deal product, quote, activity, note, list, scoring rule, sales quota, lead form, lead source, email template, service contract

Item	Detail
Account status	Prospect, qualified, active, nurture, churned, dormant; client status suspect, prospect, client; ARR from contracts or manual
Leads	8 statuses from new to converted; source, form, territory, score and band (hot, warm, cold); Convert lead to contact, account and deal; funnel report
Web-to-lead	Form fields, consent text and basis, captcha (Turnstile or reCAPTCHA), per-hour limit, allowed domains, redirect; embed code with live preview; repeat submission logs an activity
Pipelines and deals	Stages with probability and won or lost flags, swimlanes, custom fields per pipeline; 5 deal types; priority 1 to 4; amount, probability, champion, decision maker, close, won and lost dates, lost reason; stage history with days in stage
Views	My day; kanban with open pipeline, weighted forecast, won this quarter, stalled, past close date, 90-day win rate; pipeline dashboard with KPIs, funnel, stage breakdown, top and overdue deals; forecast by month and owner against quota with stale deals
Quotes	Versioned from deal products; draft, sent, accepted, rejected, superseded, expired; PDF; Send for signature through DemandSign; outcome written back
Activities	7 types (call, meeting, email, task, demo, proposal, note); planned, completed, cancelled; outcome, direction, next step; manual, Microsoft 365 or Google source; last contacted and next follow-up kept current
Email and calendar	Send from the user's Microsoft mailbox, logged as an activity; inbound and opens recorded; per-user Microsoft 365 or Google calendar sync creating meeting activities
Scoring and reminders	Fit and engagement rules on field, activity, message, recency or open deal signals with points and window; nightly scoring at 02:15; owner reminders daily at 06:30 in the app
Lists	Contacts, companies or leads; static or smart; Create tasks, Check a send, Find people (Hunter); duplicate merge keeps activities, deals and memberships
Campaigns	Audience list and role words; up to 4 steps (first email plus 3 follow-ups) with delay days and same-thread; status draft, scheduled, running, paused, finished, stopped; preview, test send, launch, pause, resume, stop; engine tick every minute; stop on reply always on
Email accounts	Microsoft 365 OAuth; from and reply-to; allowed users and teams; daily cap, min and max gap, send window days and hours, time zone, ramp-up; health check for token, SPF, DKIM, DMARC and 7-day bounce rate; auto-pause with reason
Replies and results	Graph subscription per account renewed every 6 hours; reply and bounce mark the recipient, log an activity and message the owner; counters for recipients, sent, replied, bounced, opened, clicked, unsubscribed, skipped
Consent	Opt-outs win; tenant daily cap; sandbox redirect; consent required for AU and NZ; express consent for sole traders and recipients without a company; unsubscribe link and SMS or WhatsApp STOP write the opt-out
Integrations	Hunter.io find and verify; push companies to HubSpot; import accounts from Dynamics 365; DemandSign; service contracts to ARR; customer reporting and QBR

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