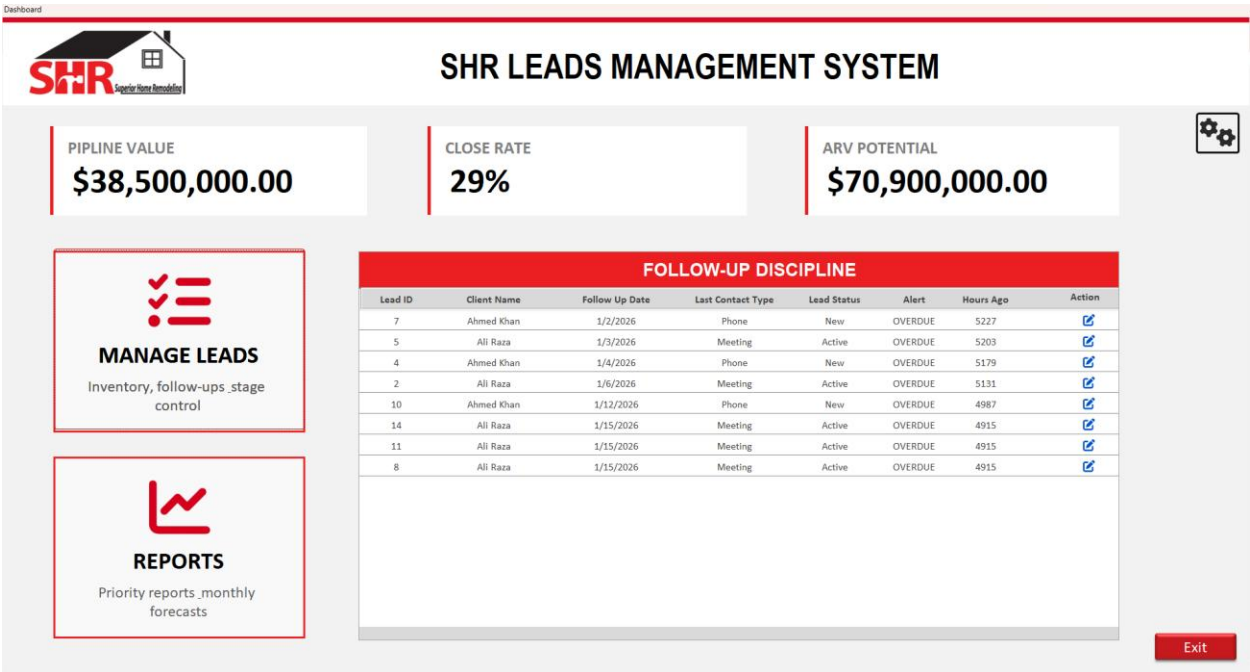


# Construction & Home Remodeling Leads Management System

Admyon Systems

Building Smarter Business Solutions



## Project Overview

The SHR Leads Management System is a high-octane Sales CRM built specifically for construction firms and high-ticket home remodeling contractors. It focuses on tightening the sales cycle by strictly monitoring follow-up discipline, forecasting start-month revenues, and tracking critical pre-construction readiness metrics like deposits and final plan approvals.

**Business Problem**

Home remodeling companies handle multi-million dollar pipelines, but they often lose lucrative deals due to poor follow-up discipline. Standard CRMs do not cater to the specific phases of construction sales—such as calculating After Repair Value (ARV) or tracking when architectural plans are finalized. This results in disorganized sales teams, delayed project start dates, and highly inaccurate revenue forecasting.

**Our Solution**

Admyon Systems developed a highly specialized CRM that introduces strict "Momentum" and "Discipline" tracking to the contractor sales process. The system forces sales agents to log every meeting and call, automatically flagging overdue follow-ups on the main dashboard. By incorporating a "Closing & Pre-Con Readiness" module, the application bridges the gap between closing a sale and actually starting the physical construction work, ensuring seamless project handoffs.

**Key Features**

- Dynamic Executive Dashboard (Pipeline Value, Close Rate, ARV Potential)
- Automated Follow-Up Discipline Alerts (Overdue Tracking)
- Pre-Construction Readiness Tracking (Contracts, Deposits, Plans)
- Start-Month Revenue Forecasting
- Active Engagement Momentum & Success Probability Scoring
- Advanced Lead Prioritization (High, Medium, Low)

**Technologies Used**

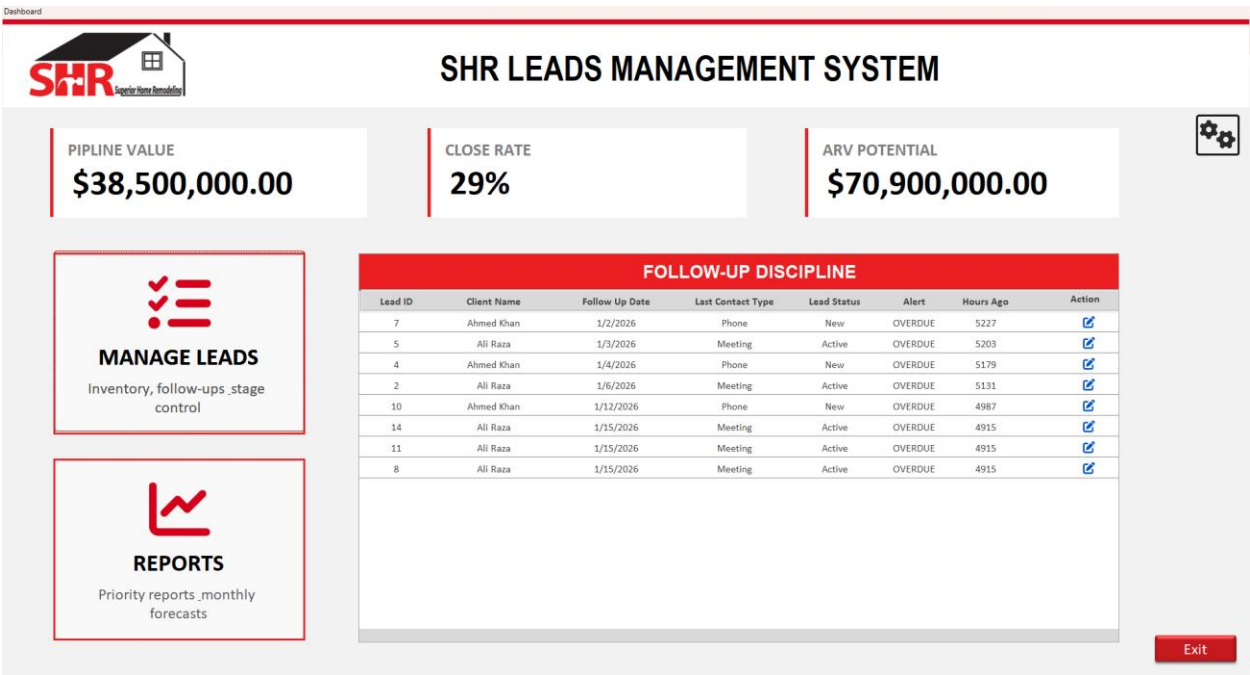
| Technology                          | Used                                                                                  |
|-------------------------------------|---------------------------------------------------------------------------------------|
| Microsoft Access                    |  |
| VBA (Visual Basic for Applications) |  |
| SQL                                 |  |

System Modules

- Executive Leads Dashboard
- Lead Details & Project Intelligence
- Master Leads Inventory
- Settings & Lead Sources Configuration
- Pipeline Revenue & Forecasting Reports
- Priority & Overdue Log Analytics

Screenshots

Executive Leads Dashboard



A high-impact control center that instantly displays the total pipeline value, overall close rates, and a strict "Follow-Up Discipline" grid that flags overdue communications in red.

Lead Intelligence & Pre-Con Form

Lead Details

X Close

Lead Entry .Project Intelligence

Lead Status

Disqualified

Client Name

Ahmed Khan

Project Type

Budget Range

\$2,500,000.00

Date Lead Came In

05/01/2026

Phone

03011234567

Email

ahmed@gmail.com

Scope Of Work

Full kitchen remodel

Lead Source

Google

City

Lahore

ARV Status

Estimated

Assigned To

Job Address

Model Town A

Own Home

Need Plans

Have Plans

Decision Maker ID

Active Engagement .Momentum

Meeting Control

In-Person Meeting Completed

Mtg Date/Time

On-Site Follow Up Needed

On-Site Follow Up Date

10/01/2026

Sales Control

Lead Priority

High

Success Probability

75

Estimate Sent Date

Target Start Month

March

Discipline

Last Contact Date

06/01/2026

Last Contact Type

Phone

Follow-Up Date

1/7/2026

Last Modify:

1/8/2026 12:09:49 PM

Closing & Pre-Con Readiness

Contract Issued

Date Issued

Contract Signed

Deposit Made

Final Plans Status

Pending

Disqualified

Save & Update Record

A specialized CRM entry screen capturing granular construction data such as ARV Status, Scope of Work, and Pre-Con Readiness (tracking whether contracts are signed and deposits are made).

Manage Leads Inventory

Manage Leads

RefreshX Close

Search by ID, Lead Status, Lead Source, Assigned To, Client Name or Project Type

SearchClear

+ New Lead

| Lead ID | Lead Status  | Lead Source | Assigned To | Client Name | Project Type | Budget Range   | ARV Status | Actions                                                                                                                                                                     |
|---------|--------------|-------------|-------------|-------------|--------------|----------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1       | Disqualified | Google      |             | Ahmed Khan  |              | \$2,500,000.00 | Estimated  |   |
| 2       | Active       |             | Staff A     | Ali Raza    | Full Reno    | \$1,200,000.00 | Estimated  |   |
| 3       | Closing      |             | Staff B     | Usman Tariq | Bath         | \$7,500,000.00 | Verified   |   |
| 4       | New          |             |             | Ahmed Khan  |              | \$2,500,000.00 | Potential  |   |
| 5       | Active       |             | Staff A     | Ali Raza    | Full Reno    | \$1,200,000.00 | Estimated  |   |
| 6       | Closing      |             | Staff B     | Usman Tariq | Full Reno    | \$7,500,000.00 | Verified   |   |
| 7       | New          |             |             | Ahmed Khan  |              | \$2,500,000.00 | Potential  |   |
| 8       | Active       |             | Staff B     | Ali Raza    | Bath         | \$1,200,000.00 | Estimated  |   |
| 9       | Closing      |             | Staff A     | Usman Tariq | Bath         | \$7,500,000.00 | Verified   |   |
| 10      | New          |             |             | Ahmed Khan  |              | \$2,500,000.00 | Potential  |   |
| 11      | Active       |             | Staff A     | Ali Raza    | Kitchen      | \$1,200,000.00 | Estimated  |   |
| 12      | Closing      |             | Adnan       | Usman Tariq | Kitchen      | \$7,500,000.00 | Verified   |   |
| 13      | Closing      |             | Adnan       | Ahmed Khan  | Addition     | \$2,500,000.00 | Potential  |   |
| 14      | Active       |             | Staff A     | Ali Raza    | New Build    | \$1,200,000.00 | Estimated  |   |
| 15      | Won          |             |             | Usman Tariq |              | \$7,500,000.00 | Verified   |   |
| 16      | Won          |             |             | Ahmed Khan  |              | \$2,500,000.00 | Potential  |   |
| 17      | Won          |             |             | Ali Raza    |              | \$1,200,000.00 | Estimated  |   |
| 18      | Won          |             |             | Usman Tariq |              | \$7,500,000.00 | Verified   |   |
| 19      | Won          |             |             | Ahmed Khan  |              | \$2,500,000.00 | Potential  |   |
| 20      | Won          |             |             | Ali Raza    |              | \$1,200,000.00 | Estimated  |   |

The master directory for all active, closing, and won projects, providing a clear overview of assigned sales staff, project types (Full Reno, Kitchen, Bath), and high-ticket budget ranges.

Start-Month Forecast Report

| Start-Month Forecast Report |              |              |             |                 |
|-----------------------------|--------------|--------------|-------------|-----------------|
| Target Start Month          | Client Name  | Project Type | Lead Status | Budget Range    |
| April                       |              |              |             |                 |
|                             | Ali Raza     | New Build    | Active      | \$1,200,000.00  |
|                             | Ali Raza     | Kitchen      | Active      | \$1,200,000.00  |
|                             | Ali Raza     | Bath         | Active      | \$1,200,000.00  |
|                             | Ali Raza     | Full Reno    | Active      | \$1,200,000.00  |
|                             | Ali Raza     | Full Reno    | Active      | \$1,200,000.00  |
| February                    |              |              |             |                 |
|                             | Adnan Mohsin | Bath         | New         | \$5,000.00      |
|                             | Usman Tariq  | Kitchen      | Closing     | \$7,500,000.00  |
|                             | Usman Tariq  | Bath         | Closing     | \$7,500,000.00  |
|                             | Usman Tariq  | Full Reno    | Closing     | \$7,500,000.00  |
|                             | Usman Tariq  | Bath         | Closing     | \$7,500,000.00  |
| March                       |              |              |             |                 |
|                             | Ahmed Khan   | Addition     | Closing     | \$2,500,000.00  |
|                             | Ahmed Khan   |              | New         | \$2,500,000.00  |
|                             | Ahmed Khan   |              | New         | \$2,500,000.00  |
|                             | Ahmed Khan   |              | New         | \$2,500,000.00  |
| Total Revenue:              |              |              |             | \$46,005,000.00 |

A critical operational report that groups won and closing leads by their targeted construction start month, enabling the business to accurately schedule labor and forecast cash flow.

Pipeline Revenue Report

Pipeline Revenue Report

| Client Name    | Project Type | Success Probability | Lead Status | Assigned To | Budge Range     |
|----------------|--------------|---------------------|-------------|-------------|-----------------|
| Ali Raza       | Full Reno    | 65                  | Active      | Staff A     | \$1,200,000.00  |
| Usman Tariq    | Bath         | 90                  | Closing     | Staff B     | \$7,500,000.00  |
| Ali Raza       | Full Reno    | 65                  | Active      | Staff A     | \$1,200,000.00  |
| Usman Tariq    | Full Reno    | 90                  | Closing     | Staff B     | \$7,500,000.00  |
| Ali Raza       | Bath         | 65                  | Active      | Staff B     | \$1,200,000.00  |
| Usman Tariq    | Bath         | 90                  | Closing     | Staff A     | \$7,500,000.00  |
| Ali Raza       | Kitchen      | 65                  | Active      | Staff A     | \$1,200,000.00  |
| Usman Tariq    | Kitchen      | 90                  | Closing     | Adnan       | \$7,500,000.00  |
| Ahmed Khan     | Addition     | 75                  | Closing     | Adnan       | \$2,500,000.00  |
| Ali Raza       | New Build    | 65                  | Active      | Staff A     | \$1,200,000.00  |
| Total Revenue: |              |                     |             |             | \$38,500,000.00 |

A financial analytics document detailing total potential revenue, mapped alongside specific success probabilities and assigned sales staff to gauge team performance.

Priority Analysis Report

Priority Analysis Report

| Lead Priority | Client Name  | Phone       | Project Type | Lead Status | Budget Range   |
|---------------|--------------|-------------|--------------|-------------|----------------|
| High          |              |             |              |             |                |
|               | Ahmed Khan   | 03011234567 | Addition     | Closing     | \$2,500,000.00 |
|               | Usman Tariq  | 03214567890 | Kitchen      | Closing     | \$7,500,000.00 |
|               | Ahmed Khan   | 03011234567 |              | New         | \$2,500,000.00 |
|               | Usman Tariq  | 03214567890 | Full Reno    | Closing     | \$7,500,000.00 |
|               | Ahmed Khan   | 03011234567 |              | New         | \$2,500,000.00 |
|               | Usman Tariq  | 03214567890 | Bath         | Closing     | \$7,500,000.00 |
| Low           |              |             |              |             |                |
|               | Ali Raza     | 03029876543 | New Build    | Active      | \$1,200,000.00 |
| Medium        |              |             |              |             |                |
|               | Adnan Mohsin |             | Bath         | New         | \$5,000.00     |
|               | Ali Raza     | 03029876543 | Kitchen      | Active      | \$1,200,000.00 |
|               | Usman Tariq  | 03214567890 | Bath         | Closing     | \$7,500,000.00 |
|               | Ali Raza     | 03029876543 | Bath         | Active      | \$1,200,000.00 |
|               | Ahmed Khan   | 03011234567 |              | New         | \$2,500,000.00 |
|               | Ali Raza     | 03029876543 | Full Reno    | Active      | \$1,200,000.00 |
|               | Ali Raza     | 03029876543 | Full Reno    | Active      | \$1,200,000.00 |

A segmented report that categorizes active leads into High, Medium, and Low priorities, allowing the sales team to focus their immediate efforts on the most lucrative deals.

### Overdue Log Report

#### Overdue Log Report

| Client Name | Phone       | Follow Up Date | Last Contact Date | Last Contact Type | Lead Status |
|-------------|-------------|----------------|-------------------|-------------------|-------------|
| Ahmed Khan  | 03011234567 | 1/2/2026       | 06/01/2026        | Phone             | New         |
| Usman Tariq | 03214567890 | 1/2/2026       | 03/01/2026        | In-Person         | Closing     |
| Ali Raza    | 03029876543 | 1/3/2026       | 05/01/2026        | Meeting           | Active      |
| Ahmed Khan  | 03011234567 | 1/4/2026       | 06/01/2026        | Phone             | New         |
| Usman Tariq | 03214567890 | 1/5/2026       | 03/01/2026        | In-Person         | Closing     |
| Ali Raza    | 03029876543 | 1/6/2026       | 05/01/2026        | Meeting           | Active      |
| Usman Tariq | 03214567890 | 1/8/2026       | 03/01/2026        | In-Person         | Closing     |
| Usman Tariq | 03214567890 | 1/8/2026       | 03/01/2026        | In-Person         | Closing     |
| Ahmed Khan  | 03011234567 | 1/12/2026      | 06/01/2026        | Phone             | Closing     |
| Ahmed Khan  | 03011234567 | 1/12/2026      | 06/01/2026        | Phone             | New         |
| Ali Raza    | 03029876543 | 1/15/2026      | 05/01/2026        | Meeting           | Active      |
| Ali Raza    | 03029876543 | 1/15/2026      | 05/01/2026        | Meeting           | Active      |
| Ali Raza    | 03029876543 | 1/15/2026      | 05/01/2026        | Meeting           | Active      |

An accountability tool for sales managers to track dropped communications, detailing exactly when a lead was last contacted and by what method.

## System Settings

Settings

Settings

X Close

Manage Lead Sources

| Lead Source ID | Lead Source |  |
|----------------|-------------|--|
| 1              | Referral    |  |
| 2              | Website     |  |
| 3              | Facebook    |  |
| 4              | Google      |  |
| 5              | Cold Call   |  |
| (New)          |             |  |

Manage Project Types

| Project Type ID | Project Type Name |  |
|-----------------|-------------------|--|
| 1               | Kitchen           |  |
| 2               | Bath              |  |
| 3               | Full Reno         |  |
| 4               | Addition          |  |
| 5               | New Build         |  |
| (New)           |                   |  |

Manage Staff

| Staff ID | Staff Name |  |
|----------|------------|--|
| 1        | Adnan      |  |
| 2        | Staff A    |  |
| 3        | Staff B    |  |
| (New)    |            |  |

The administrative backend where management can dynamically define Lead Sources (Google, Facebook, Referrals) and Project Types to customize the CRM to their specific services.

## Business Benefits

- ✓ Drastically reduced lead leakage by enforcing strict follow-up discipline and overdue alerts
- ✓ Improved operational planning through accurate Start-Month revenue forecasting
- ✓ Streamlined the transition from sales to operations via the Pre-Con Readiness tracker
- ✓ Enhanced marketing ROI tracking by accurately logging which lead sources generated the highest ARV
- ✓ Fostered a high-performance sales culture through visible momentum and probability metrics

## **Project Highlights**

- Construction-Specific Sales Logic
- ARV (After Repair Value) Tracking
- Strict Accountability Alerts
- Pre-Construction Handoffs
- Aggressive, High-Contrast UI

## **Future Enhancements**

Future versions of this system may include:

- API integration with estimating software (e.g., Buildertrend or Procore) to push won leads directly into project management
- Automated SMS and email drip campaigns to nurture "Cold" or "Low Priority" leads
- Digital signature integration (e.g., DocuSign) to execute remodeling contracts directly from the CRM
- Before/After photo attachment capabilities for the project intelligence module

## **Project Summary**

The Construction & Home Remodeling Leads Management System proves Admyon Systems' capability to optimize high-ticket sales environments. By replacing generic CRM workflows with construction-specific milestones like ARV calculations and Pre-Con readiness, the platform equips remodeling contractors to scale their revenue with ruthless efficiency.