

Predictive CRM: Your Next Big Customer

Implementing AI-Based Lead
Scoring in dRyZe CRM

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Agenda

- Why Predictive Lead Scoring Matters
- Data Preparation & Quality
- Feature Engineering
- Model Selection & Training
- CRM Integration & Workflows
- Monitoring & Continuous Improvement
- Case Study: “Project Phoenix”
- Q&A



Why Predictive Lead Scoring Matters



- Manual qualification misses subtle signals
- AI scores leads (0–100) based on patterns
- Typical impact: 30–50% higher win rates; >30% reduced wasted outreach



Phase 1 – Data Preparation & Quality

- Gather 12–24 months of leads, activities, outcomes
- Clean: deduplicate, normalize, impute/drop missing
- Label each record: won, lost, in-progress



Phase 2 – Feature Engineering

- Core: RFM metrics, engagement velocity, channel mix
- Advanced: decayed recency scores, behavioral clusters, sequence patterns



Phase 3 – Model Selection & Training

- Algorithms: logistic regression, Random Forest/GBM, AutoML
- Validation: 70/15/15 split or k-fold; AUC-ROC ≥ 0.75 , Precision@10
- Iterate: hyperparameter tuning, feature pruning/augmentation



Phase 4 – Integration with dRyZe CRM

- Package model: REST endpoint or PMML
- Configure: Settings → AI & Automation → Lead Scoring
- Map fields; choose batch vs. real-time scoring



Phase 5 – Workflows & Automation

- Dynamic Lists: “Hot Prospects” (Score ≥ 80)
- Alerts: Slack/Email when thresholds cross
- Task Automation: “Call within 24h” for hot leads
- Dashboards: Score distribution & lift charts

55%
PERSONAL DATA
COMPLETION



Phase 6 – Monitoring & Continuous Improvement

- Drift Detection: feature & prediction shifts
- Retraining Cadence: quarterly full, monthly incremental
- A/B Tests: old vs. new models, threshold tuning
- Sales Feedback Loop: rep override tags



Case Study & Next Steps

- “Project Phoenix”
Results: conversion
↑175%, deal size +18%,
16 days faster, 30% time
saved
- Next Steps: sandbox
setup, first-pass model
training, pilot alerts