

pivotal retention

2020

The Basics

Pivotal Retention is a workflow automation tool that helps marketing companies keep their drivers. It uses the sales developer and designer, and charged with architecture, UI, UX, product spec, and implementation plan and process for the platform.

2020

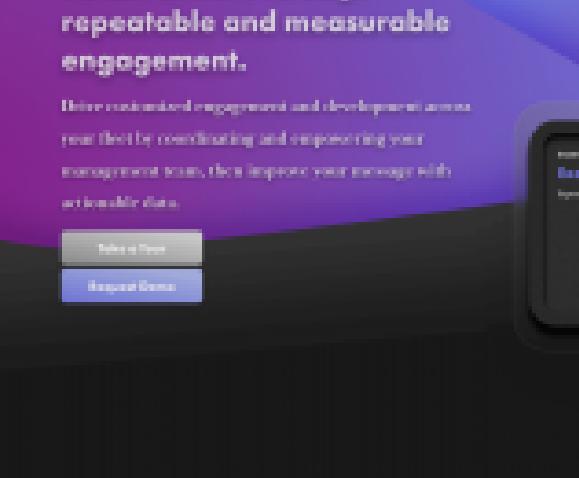
1.0.0 (Release) | 10+ Unique Screens | 60+ Custom REST APIs

Tech Stack

Production Environment

Heroku Dyno (8 Threads)

PM2 Cluster (NodeJS)



Application Stack

JavaScript

REST APIs | SSR (Express.js) | Scheduled Tasks (Task Queue)

Node.js | Express.js

Mongoose | MongoDB

PM2 Cluster (Multi-thread & Load Balance)

Heroku (Compile & Compute)

Support Systems

Git (Version Repository)

Goldilocks (DMS)

Twilio SendGrid (Email)

Google Analytics (Site Analytics)

Amplitude (App Analytics)

Costiller (Cost Compliance)

Adobe TypeKit (Fonts)

Papa Parse (CSV/JSON)

Conversion

Cloud9 (VTPM)

Cookie-Parser (NPM)

Compress (NPM)

All Other External Integrations

Planned Stack Modifications

- Separate Heroku Dynos or PM2 threads for Scheduled Tasks, REST APIs, and Front end service

Key Product Requirements

- A mobile design to match customer personas
- A simple, low-clutter interface for easy adoption
- An adaptable product capable of creating new steps quickly
- Solid path and modules for completion based on business strategy
- Smooth rollout to front line client and support after
- Marketing and sales tools in line with business needs

The Landing Page

Retain drivers through repeatable and measurable engagement.

Drive customer engagement and development success year over year by coordinating and responding to your engagement tasks, then improve your message with actionable data.

From inside our own fleet, you have unique needs. It may be a dedicated service that you are providing, a specific training track, or a specialized process. Any unique message can easily be added and defined consistently.

For Pivotal

Is Pivotal Right For You?

Every fleet has different needs. The Pivotal system is built around a core solution that lets you use the best of your current practices and deliver them consistently across your fleet.

Once you get started, you can use Pivotal's data insights to continuously improve the system and adapt to changing conditions in real time.

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For Pivotal

Voices of the Industry

Feature List

Workflow & Task Creation and Editing System

- Workflow builder system with user data driven custom tools
- Task flow system for driving dynamic task interface
- Template, duplicate, and "mapping" system
 - Duplicate tool for custom creation
 - Mapping system to quickly manage tasks to user needs
- Task creation and quick edit system
 - Dynamic, user-driven fields and forms
 - Validation of created task
 - Escalation settings system for failed/ skipped tasks

Workflow Task Instance System

- All changes to workflow & task pushed live immediately to all future and current workflows
- Cross instance tracking tasks, live status, live feedback, request status, task creation, result & validation status for all key events
- Validation of task and workflow instance creation and assignment
- Multi-threaded Cross instance system

Workflow Task Completion

- Automated tracking of tasks and completion items
- Home and personal reminder system
- Real-time reported feedback from task completion
- Multi-threaded feedback system

Reporting Tools

- Drag and drop data visualization system (pivot table, line chart, bar chart, scatter plot, etc.)
- Detailed reports and automatic visualization tools (complete, failed, task response, completed task, etc.)
- Real-time data visualization tools (real-time task status, user activity, task flow, task processing, match entry, system status, task status, etc.)

Organizational Accounts

- Organization and data sharing between accounts and individuals
 - Cross account and data sharing between accounts and individuals
 - Organization and data sharing between accounts and individuals

Users

- User accounts
- Account creation
- Password hashing & storage (bcrypt)
- OAuth authentication

Profile

- Detailed profile system with robust user handling
 - Detailed profile system with robust user handling
 - Profile search and uniquely identifiable profile display each user
 - Bulk profile creation from CSV
 - Bulk profile import from CSV
 - Bulk validation for user creation
 - Data validation for all user validation

Activity

- User activity and event tracking system
 - Cross account and event tracking system

Customization

- Customization and data sharing between accounts and individuals
 - Cross account and data sharing between accounts and individuals
 - Organization and data sharing between accounts and individuals

APIs

- REST API for external integration
 - Cross account and data sharing between accounts and individuals
 - Organization and data sharing between accounts and individuals

Mobile

- Mobile application and mobile website
 - Cross account and data sharing between accounts and individuals
 - Organization and data sharing between accounts and individuals

Cloud & Data

- Cloud integration and machine readable blueprints for cloud-based project
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Security

- Security and data protection
 - Cross account and data protection
 - Organization and data protection

Integrations

- Integration with external systems
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