.

Final Presentation on Capstone Project

Sales Funnel Analytics & Optimization

Duration: 5 Weeks

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Project Objectives

- Map lead-to-deal sales funnel
- Track and visualize funnel metrics
- Identify drop-off points and performance variances
- Automate reporting for stakeholders

Project Plan(5 weeks)

Week 1: Planning,Setup & DataSourceIntegration

Week 2: Data Cleaning, ETL & SQL Modeling

Week 3: KPI Computation & EDA

Week 4: Dashboarding & Automation

Week 5: Final Presentation & Documentation

Funnel Definition(Week 1)

- Lead → Contacted → Demo → Proposal → Deal/Lost
- Mock CRM data created (CSV/Sheets)
- Drafted CRM schema (leads, opportunities, activities)
- Base ingestion setup with Google Sheets

Data Preparation (Week 2)

- Cleaned raw CRM data (standardized labels & timestamps)
- ETL pipeline using Python
- SQL CASE, JOIN, DATE_DIFF for stage classification
- Structured data loaded into Sheets/SQLite/BigQuery

KPI and Exploratory Analysis(Week 3)

- Total Leads by Industry/Region
- Total Revenue by Industry/Region
- Average Deal Size
- Total Ongoing Deals
- Win rate

Dashboarding(Week 4)

- Interactive dashboard in Looker Studio
- Views by Funnel Stage, Region, Rep
- Drill-down KPIs with live tracking

Strategic Insights

● High drop-off at Demo → Proposalstage

● Regions underperform in early lead contact

● Reps with low conversions need training

● Prioritize high-fit leads for efficiency

Tools and Tech stacks

Clean structured CRM database
- ETL pipeline (Python)
- SQL scripts for funnel classification
- EDA notebook & KPI tables
- Interactive Dashboard
- Final presentation deck & documentation

Dashboard

Dashboard-Link

Detailed Work Outcomes

● A structured, data-driven funnel view empowers the sales team to:

● Identify bottlenecks faster.

● Improve rep and regional performance.

● Focus on leads that actually convert.