



STREAMLINING SALES PIPELINE MANAGEMENT WITH AUTOMATION TOOLS

Mou Man Tai

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INTRODUCING OUR BEST TEAM



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Tunku Abdul Rahman University
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Bachelor of Science (Honours)
Applied Mathematics with
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**WHY DO WE NEED
SALES PIPELINE?**

PROBLEM STATEMENT

1. Inefficient Sales Process
2. High Customer Attrition
3. Inconsistent Sales Forecasting
4. High Cost CRM System
5. Low Scalability

LETS GET STARTED







GOOGLE SHEETS



APPSCRIPT



GOOGLE FORM

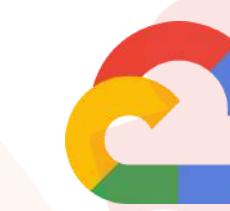


GOOGLE WORKSPACE MARKETPLACE

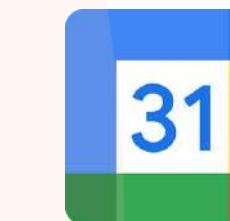


LOOKER

HOW WE FIX THEM?



BIG QUERY



GOOGLE CALENDAR



GMAIL

GOOGLE SHEET



HOW WE WORK ?

Used to store and manage all sales data, tracking every stage of the sales process from initial lead to final outcome. This ensures organized monitoring of sales closure probabilities, revenue forecasting, and sales team workflow management.

| Expected Revenue | Start Date | Last Modified | Team |
|--------------------|-------------|---------------|----------|
| 1% RM 165,000.00 | 1-Jan-2023 | 31-Mar-2023 | Jr |
| 0% RM 0.00 | 5-Jan-2023 | 4-Apr-2023 | Janice |
| 100% RM 132,500.00 | 18-Jan-2023 | 17-Apr-2023 | Michael |
| 0% RM 0.00 | 25-Jan-2023 | 24-Apr-2023 | Donna |
| 0% RM 0.00 | 29-Jan-2023 | 28-Apr-2023 | Susan |
| 0% RM 0.00 | 9-Feb-2023 | 9-May-2023 | Samantha |
| 100% RM 175,000.00 | 12-Feb-2023 | 12-May-2023 | John |
| 100% RM 87,500.00 | 14-Feb-2023 | 14-May-2023 | Jr |
| 0% RM 0.00 | 19-Feb-2023 | 19-May-2023 | Janice |
| 0% RM 0.00 | 28-Feb-2023 | 28-May-2023 | Michael |
| 25% RM 45,000.00 | 5-Mar-2023 | 3-Jun-2023 | Donna |
| 100% RM 120,000.00 | 13-Mar-2023 | 11-Jun-2023 | Janice |
| 100% RM 55,000.00 | 16-Mar-2023 | 14-Jun-2023 | Donna |
| 0% RM 0.00 | 26-Mar-2023 | 24-Jun-2023 | Susan |
| 0% RM 0.00 | 4-Apr-2023 | 3-Jul-2023 | Samantha |
| 100% RM 85,000.00 | 5-Apr-2023 | 4-Jul-2023 | John |
| 50% RM 87,750.00 | 8-Apr-2023 | 7-Jul-2023 | Jr |
| 0% RM 0.00 | 18-Apr-2023 | 17-Jul-2023 | Janice |
| 25% RM 37,500.00 | 24-Apr-2023 | 23-Jul-2023 | Michael |
| 100% RM 62,500.00 | 27-Apr-2023 | 26-Jul-2023 | Donna |
| 25% RM 27,500.00 | 2-May-2023 | 31-Jul-2023 | Susan |
| 50% RM 37,500.00 | 7-May-2023 | 5-Aug-2023 | Samantha |
| 100% RM 92,500.00 | 9-May-2023 | 7-Aug-2023 | John |
| 50% RM 90,000.00 | 14-May-2023 | 12-Aug-2023 | Jr |
| 25% RM 16,250.00 | 17-May-2023 | 15-Aug-2023 | Janice |
| 100% RM 140,000.00 | 21-May-2023 | 19-Aug-2023 | Donna |
| 0% RM 0.00 | 24-May-2023 | 22-Aug-2023 | Susan |
| 0% RM 0.00 | 30-May-2023 | 28-Aug-2023 | Samantha |
| 100% RM 72,500.00 | 5-Jun-2023 | 3-Sep-2023 | John |
| 25% RM 30,000.00 | 10-Jun-2023 | 8-Sep-2023 | Jr |
| 0% RM 0.00 | 14-Jun-2023 | 12-Sep-2023 | Janice |
| 100% RM 175,000.00 | 20-Jun-2023 | 18-Sep-2023 | Michael |
| 25% RM 22,000.00 | 25-Jun-2023 | 23-Sep-2023 | Donna |
| 0% RM 0.00 | 1-Jul-2023 | 20-Sep-2023 | Susan |
| 0% RM 0.00 | 5-Jul-2023 | 27-Sep-2023 | Samantha |

APPSCRIPT </>

- Sends reminder emails to sales reps and clients, tracks sales targets, adds new sales opportunities to the "Sales Pipeline" sheet, and notifies team members.
- It manages data entry, updates records, deletes records, and integrates with Google Calendar for event scheduling, ensuring timely follow-ups and streamlined workflow management.

```
function sendReminderEmails() {
  var salesPipelineSheet = SpreadsheetApp.getSheetByName("Sales Pipeline");
  var settingsSheet = SpreadsheetApp.getSheetByName("Settings");

  // Get the number of days from last interaction
  var daysThreshold = settingsSheet.getRange("D2").getNumber();
  var today = new Date();
  var lastInteractionIndex = 12;

  // Get the sales pipeline data and rep email addresses
  var pipelineData = salesPipelineSheet.getRange("A2:D" + lastInteractionIndex).getValues();
  var repsData = settingsSheet.getRange("A2:B" + lastInteractionIndex).getValues();

  // Create a map of email addresses for quick lookup
  var emailMap = {};
  repsData.slice(1).forEach(row => {
    if (row[0] && row[1]) {
      emailMap[row[0]] = row[1];
    }
  });

  // Loop through the sales pipeline data
  pipelineData.slice(1).forEach(row => {
    if (row[lastInteractionIndex]) {
      var lastInteractionDate = new Date(row[lastInteractionIndex]);
      var daysDifference = Math.floor((today - lastInteractionDate) / (1000 * 60 * 60 * 24));

      if (daysDifference > daysThreshold) {
        var [repEmail, subject, body] = [
          emailMap[row[0]],
          "Sales Pipeline Update",
          `Hello ${row[1]},\n\nWe hope this message finds you well. As we approach the end of the quarter, we wanted to remind you about our current sales pipeline. Please find an overview below.\n\n${row[2]}\n${row[3]}`];
        MailApp.sendEmail(repEmail, subject, body);
      }
    }
  });
}
```



GOOGLE FORM



Serves as a data collection tool to gather information from new customers interested in our products. It ensures continuous engagement with potential clients and supports strategic decision-making.

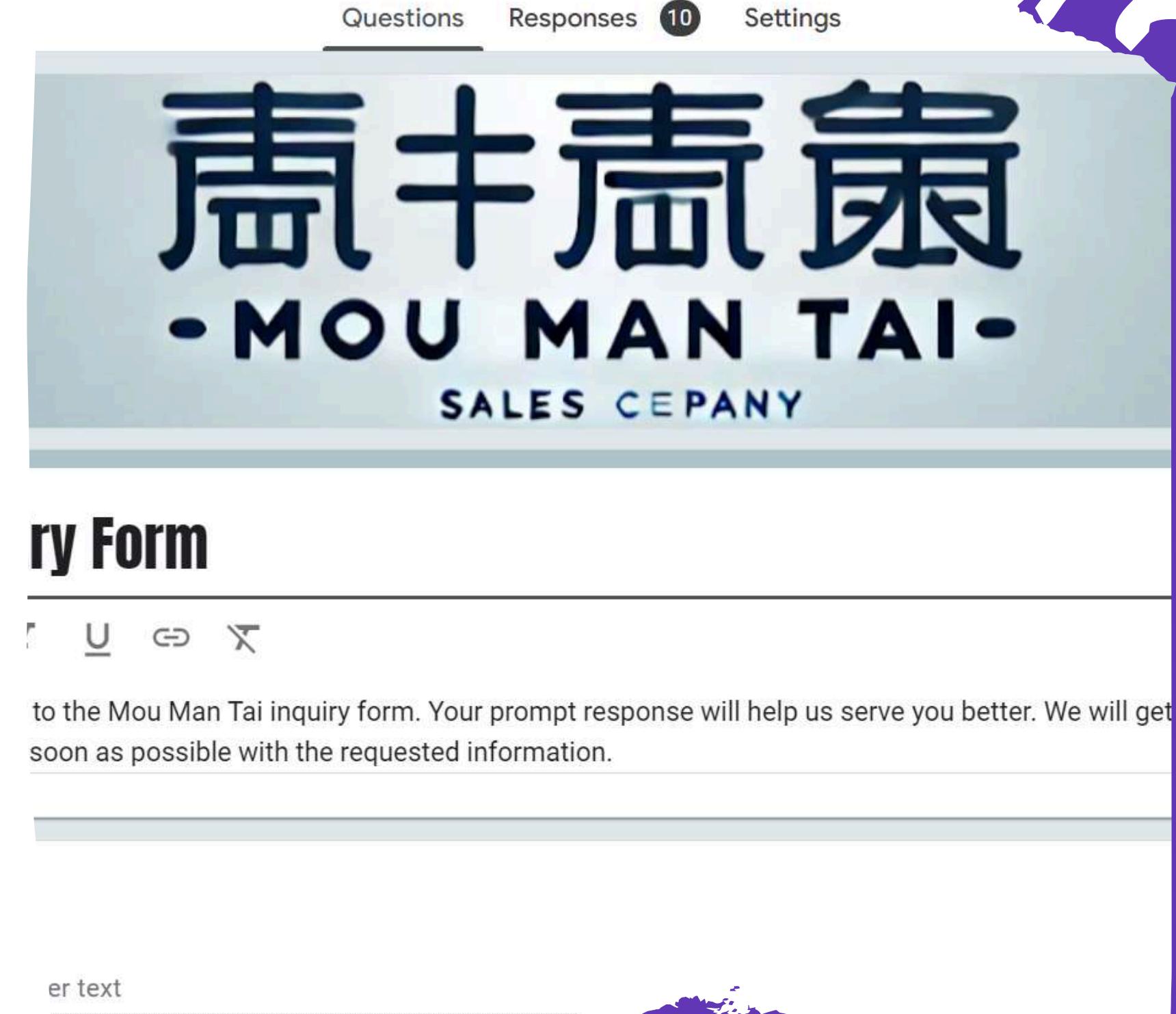
Questions Responses 10 Settings

問 半 壓 崗
- MOU MAN TAI -
SALES CEPANY

Inquiry Form

to the Mou Man Tai inquiry form. Your prompt response will help us serve you better. We will get soon as possible with the requested information.

er text



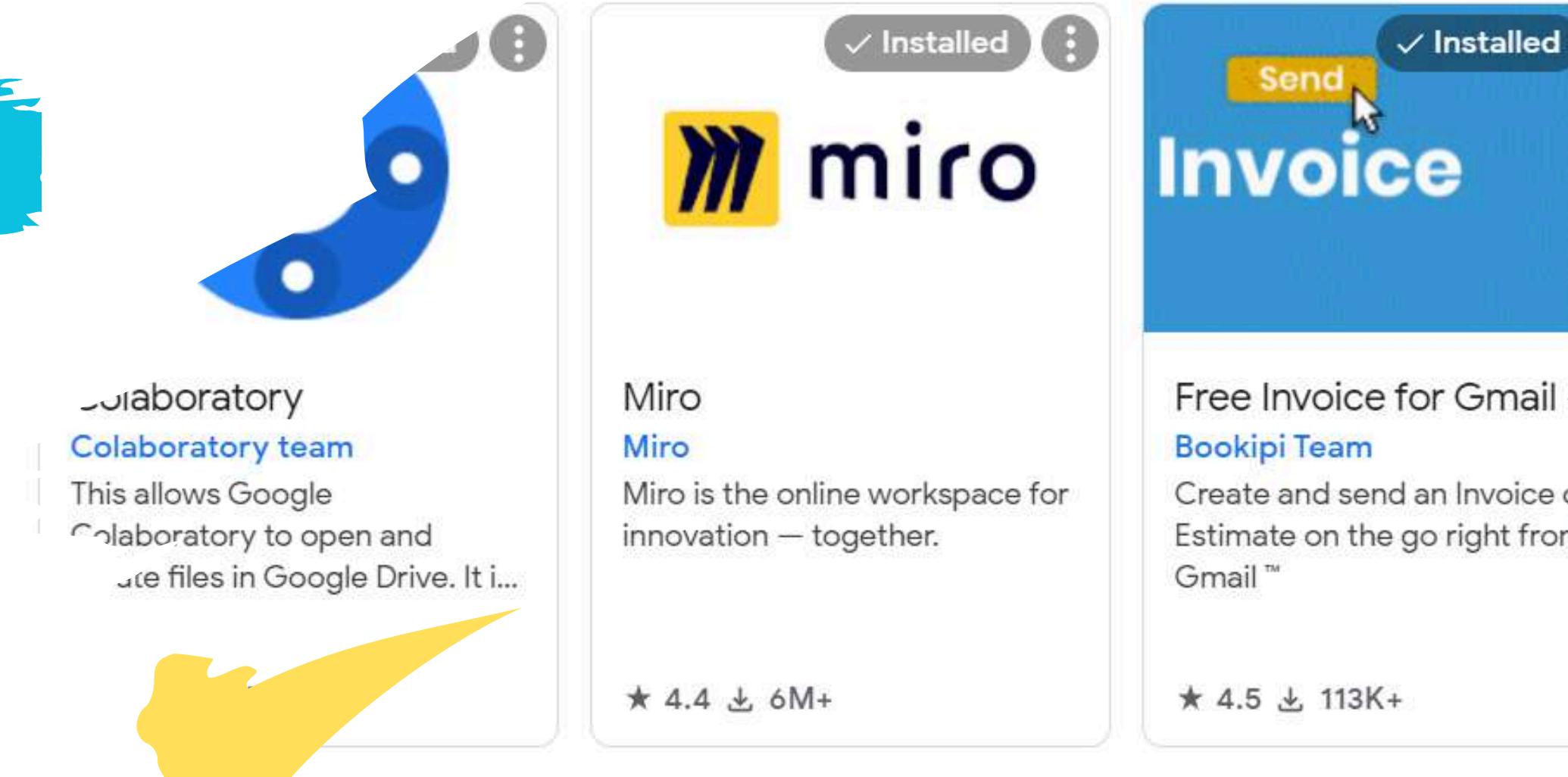
GOOGLE CALENDAR

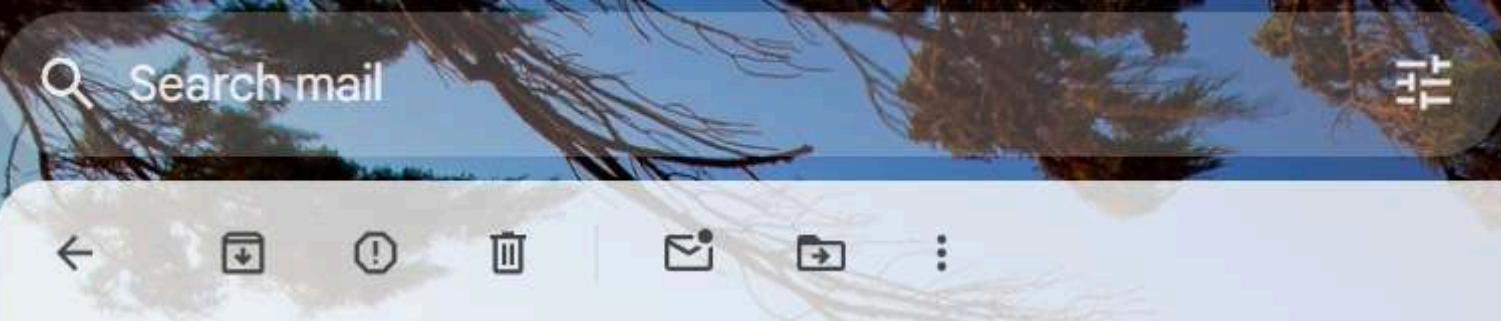
Marking down the dates when Google Forms are sent and appointments are set. This integration ensures that all client interactions and follow-up activities are scheduled and tracked, facilitating efficient management of sales processes and improving client engagement.

| July 2024 | | | | | | |
|-----------|----|----|----|----|----|----|
| S | M | T | W | T | F | S |
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |

GOOGLE WORKSPACE MARKETPLACE

Provides additional apps and integrations to streamline the sales management process, enhancing the functionality of our system.





Reminder: Yearly Target Progress

Inbox x



reallyhat@gmail.com

20:47 (12 hours ago)



to me ▾

Dear Janice,

This is a reminder of your progress towards the sales target for this year. You **434000** in sales.

You need **RM 66000** more to reach your yearly target of **RM 500000**.

Your progress towards the target is **86.80%**.

There are **5** months left to hit the target.

Keep pushing to achieve your goal!

Best regards,

Sales Team

Reply

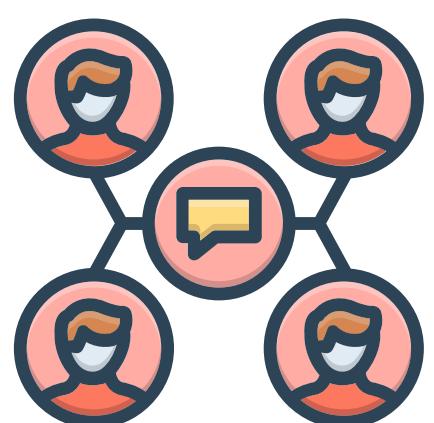
Forward



GMAIL

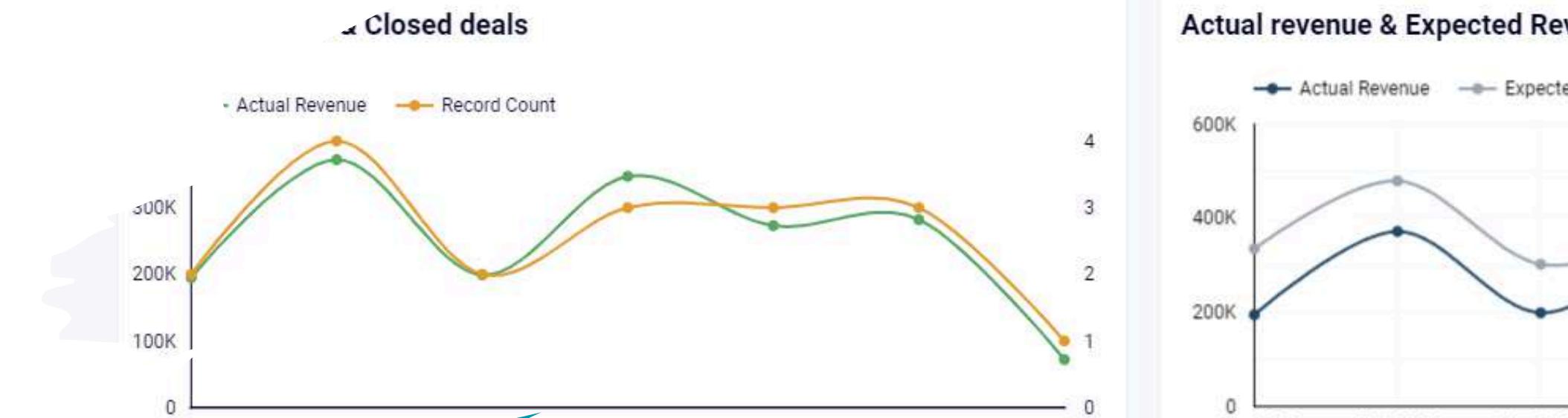


Used for automated email interactions with customers and sales reps, including reminders, notifications, and sending invoices to companies.



LOOKER

Used to visualize and analyze the data stored in Google Sheets/BigQuery, providing clear insights into sales performance and helping to make data-driven decisions.



BIG QUERY



Providing powerful storage capabilities within Google Workspace. It allows the company to handle large datasets from various sources and perform complex queries quickly.



PRICING

BigQuery pricing

Overview of BigQuery pricing

On-demand compute pricing

Capacity compute pricing

Storage pricing

Data Transfer Service pricing

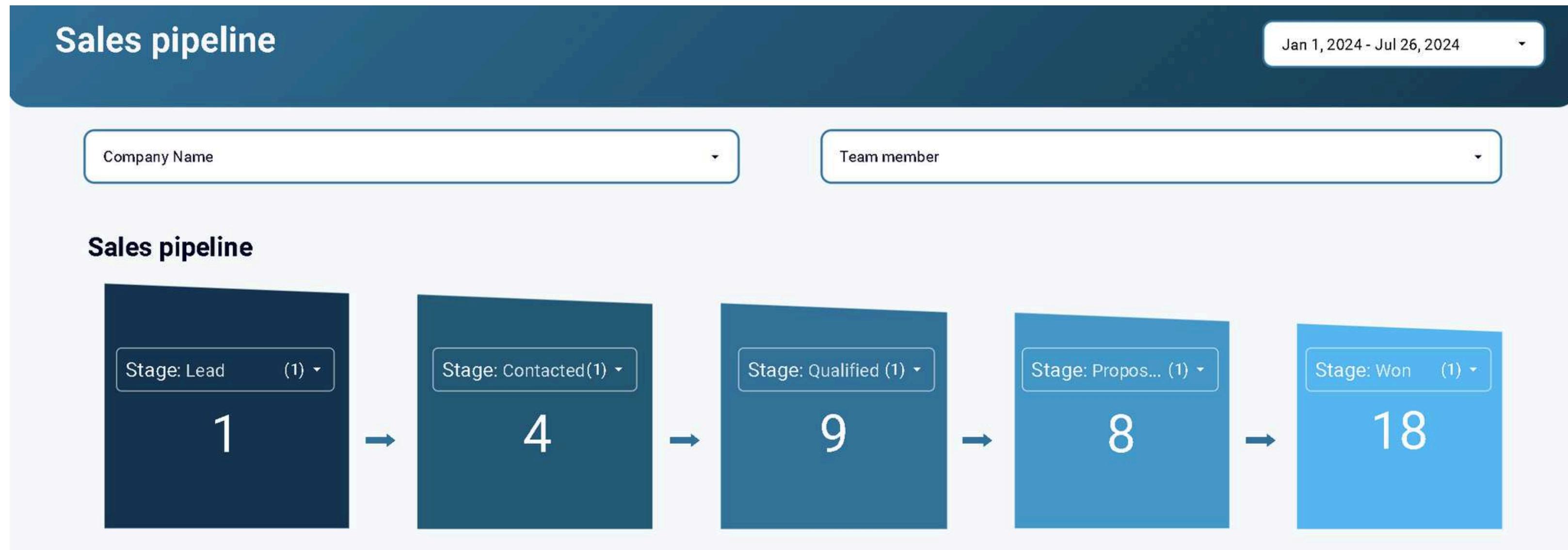
DEMONSTARTION TIME!

BY JANICE

**HOW DO WE ADDRESS
EACH PROBLEM?**

PROBLEM: INEFFICIENT SALES PROCESS

With Looker, we can streamline each stage of sales process & address them accordingly



PROBLEM: HIGH CUSTOMER ATTRITION

| M | N |
|---------------------------|--|
| Last interacted on | Cells highlighted in red mean you haven't been in contact with this lead for 7 days (by default). |
| 2- Mar-2023 | You can change the number of days after which you're reminded to follow up in the 'Settings & Instructions' sheet. |
| 6- Mar-2023 | |
| 19- Mar-2023 | |
| 26- Mar-2023 | |
| 30- Mar-2023 | Retarget later |
| 10- Apr-2023 | Retarget later |

Automated reminder to sales representative to follow up clients.

Follow-up Reminder for Company B ▾

 reallyhat@gmail.com
to laijienweng ▾

Sat, Jul 13, 5:04 PM    

Dear Jr,

This is a friendly reminder to follow up with Oprah Winfrey from Company B (oprah@companyb.com). It has been **14 days** since the last interaction.

Next Step: Follow-up

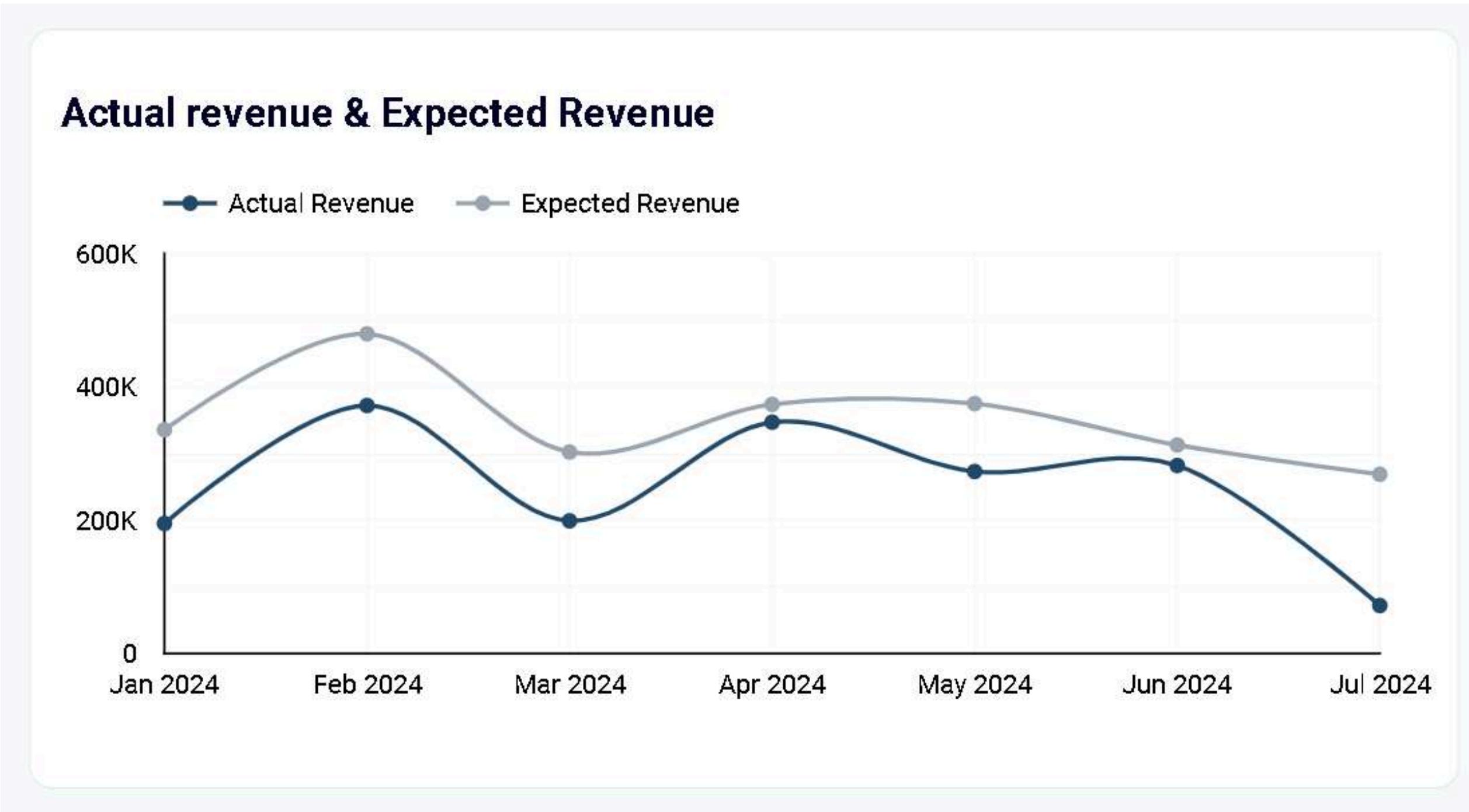
Please ensure to complete the necessary actions as soon as possible to keep the sales process on track. If you need any assistance or have any questions, do not hesitate to reach out.

Thank you for your attention to this matter.

Best regards,
Sales Team

PROBLEM: INCONSISTENT SALES FORECASTING

Utilizes Looker to forecast expected sales in the upcoming time.



PROBLEM: HIGH COST CRM SYSTEM

Note: Google Workspace is free for the first 15GB storage per user

The image shows the Google Workspace pricing page. At the top, it lists 'Every plan includes' with icons for Gmail, Drive, Meet, Calendar, Chat, Docs, Sheets, Slides, Keep, Sites, Forms, and AppSheet. A 'Featured add-on' section highlights Gemini with a 'New' badge. Below this, four plans are listed:

- Business Starter**: For the first step in running a professional business. Priced at RM12.50 MYR (RM25* per user/month, 1-year commitment). Includes 30 GB pooled storage per user* and secure custom business email. Available with a Gemini add-on. [Start a trial](#).
- Business Standard**: For growing businesses that collaborate and connect often. Priced at RM30 MYR (RM50* per user/month, 1-year commitment). Includes 2 TB pooled storage per user*. Available with a Gemini add-on. [Start a trial](#).
- Business Plus**: When extra security and compliance is a top priority. Priced at RM75 MYR (per user/month, 1-year commitment). Includes 5 TB pooled storage per user*. Available with a Gemini add-on. [Start a trial](#).
- Enterprise**: Scaled productivity solutions for more than 300 users. Priced by contact sales. Includes 5 TB pooled storage per user, with the ability to request more*. Available with a Gemini add-on. [Contact sales](#).

PROBLEM: LOW SCALABILITY

Cloud Storage i

Cloud Storage configuration

RM96.12 / month

Advanced settings x

Location type* i

Region

Location* i

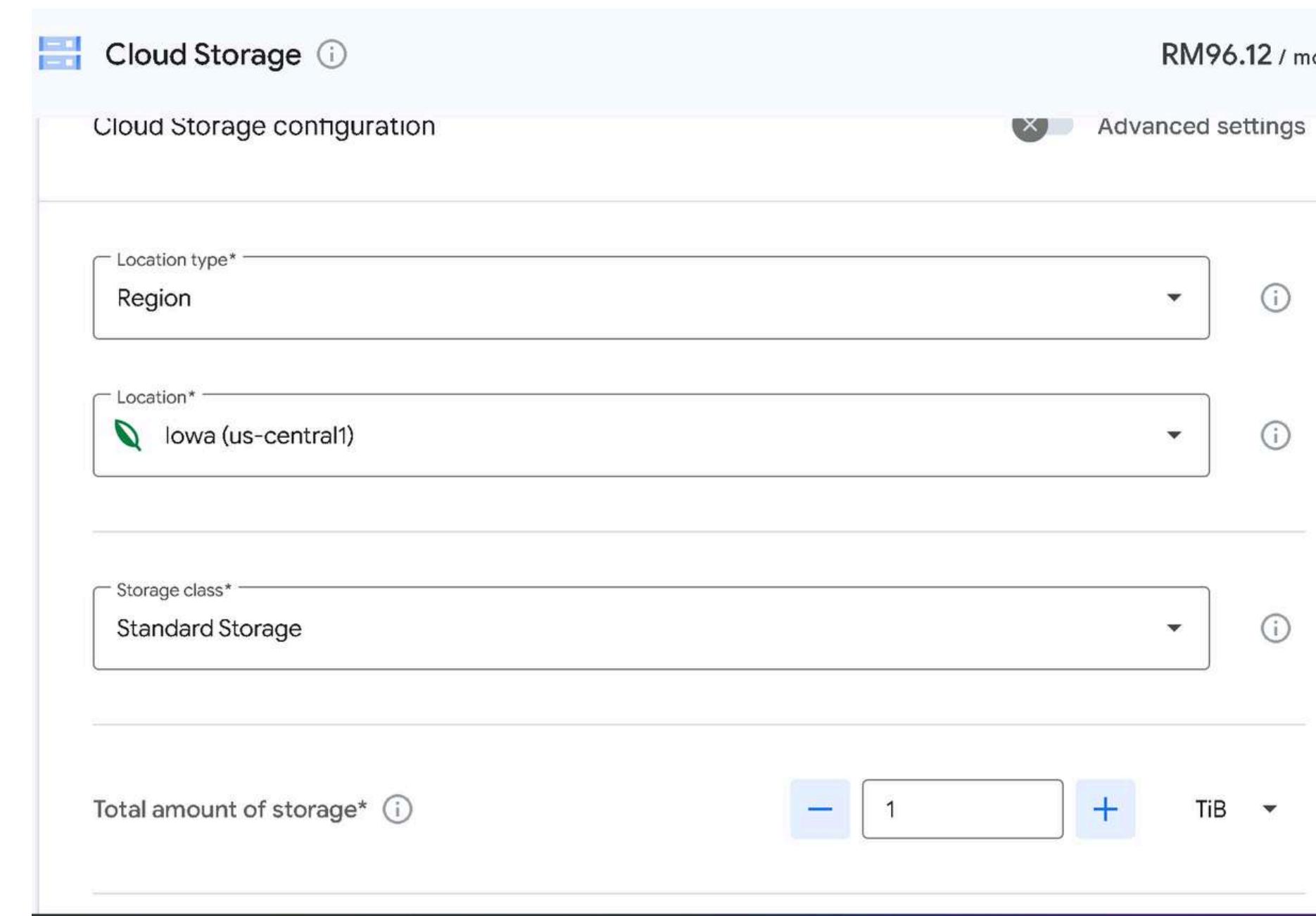
Iowa (us-central1)

Storage class* i

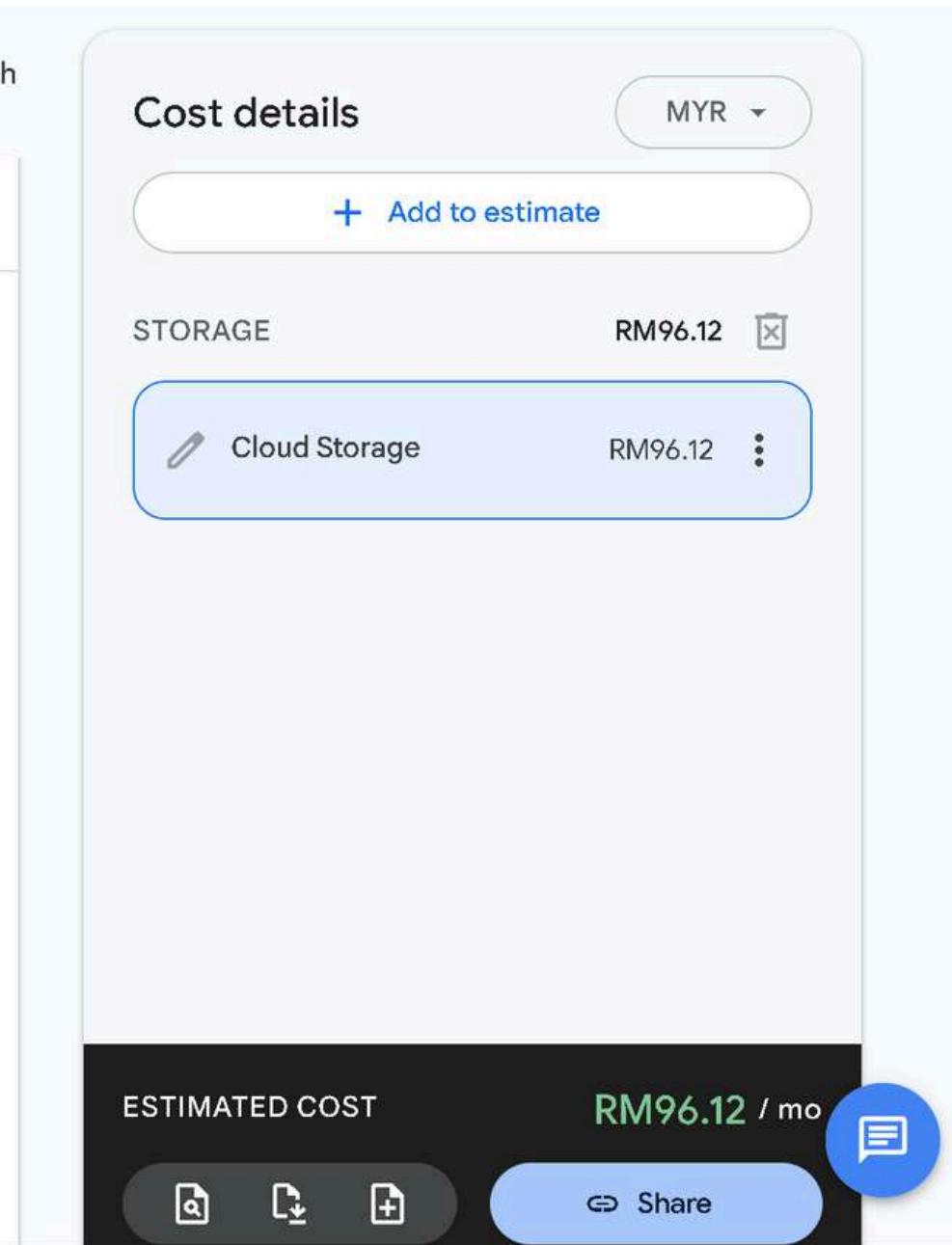
Standard Storage

Total amount of storage* i

1 TiB



AppScript works seamlessly with
BigQuery as business upscale.
Note: 1TiB storage RM96.12 per month



**IS THE PRODUCT
FEASIBLE IN LONG TERM?**

YES!

WHY IS IT FEASIBLE?

MARKET DEMAND

- Growing Number of SMEs
- Digital Transformation

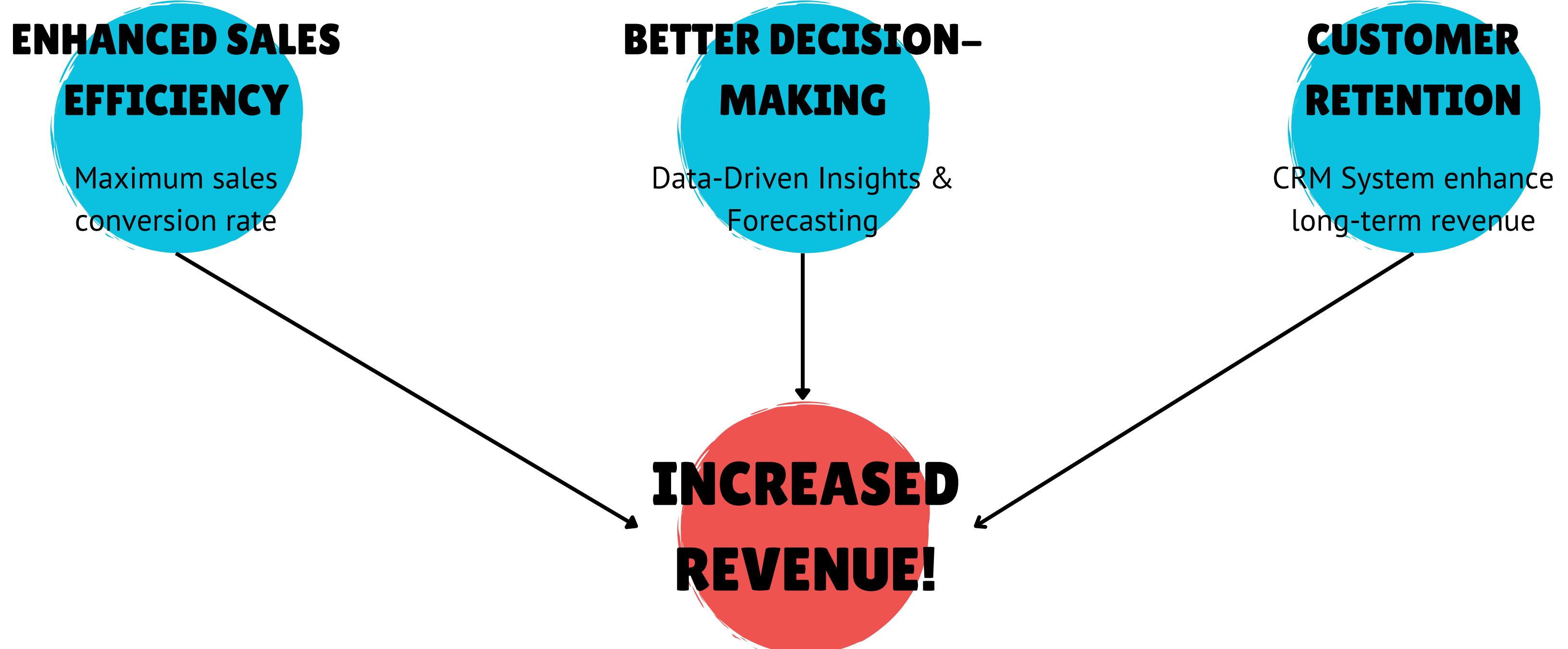
TECHNOLOGICAL ADVANCEMENTS

- Cloud Computing
- Integration Capabilities
- High Scalability

COST-EFFECTIVENESS

- Minimal Initial Investment
- Subscription Revenue Model

BUSINESS VALUES



BUSINESS VALUES

STORAGE



**SCALABILITY
& COST EFFECTIVE**

**UNLIMITED
INTEGRATION**



EASE OF ACCESS



TAM
TOTAL ADDRESSABLE MARKET

GLOBAL SME MARKET:

400 MILLIONS



**USD 52.64 BILLION
(WITH 10.6% P.A GROWTH)**

SAM
SERVICEABLE ADDRESSABLE MARKET

SOUTHEAST ASIA SME MARKET

70 MILLION



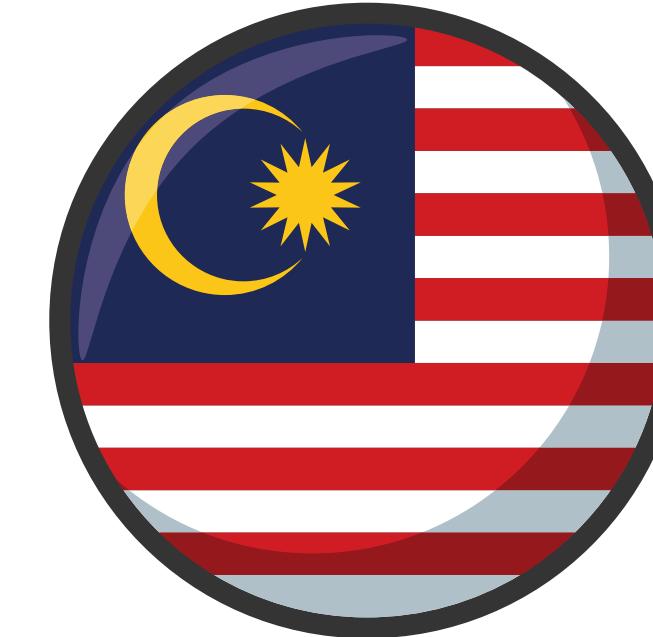
50% TECH ADOPTION

TARGET: 35 MILLION SME

SOM
SERVICEABLE OBTAINABLE MARKET

MALAYSIA SME MARKET

1.15 MILLION



**0.5% MARKET
PENETRATION
PER YEAR**

TARGET: 5,750 SME PER YEAR

**WHY CHOOSE YOU,
NOT OTHERS?**



CRM solutions to start fast and scale.

Starter and Pro Suites bring marketing, sales, service, and commerce together into one easy-to-use suite, so you have the tools you need to grow fast, all in one place. When you're ready to elevate your sales growth to the next level, Enterprise is here to assist with advanced sales solutions.

Starter Suite

The simple CRM suite with marketing, sales, service, and commerce.

\$25

USD/User/Month

(Billed monthly or annually)

- ✓ Simplified Setup and Onboarding
- ✓ Lead, Account, Contact, and Opportunity Management
- ✓ Email Integration and Automated Activity Capture

Try for free ↗

Pro Suite

The enhanced CRM suite with even more marketing, sales, service, and commerce tools.

\$100

USD/User/Month

(Billed annually)

- ✓ Greater Customisation and Automation
- ✓ Sales Quoting and Forecasting
- ✓ Enhanced, Real-Time Chat

Try for free ↗

Enterprise

The CRM for sales with more flexibility and web API.

\$165

USD/User/Month

(Billed annually)

- ✓ Sales capabilities in Pro Suite, plus Advanced Pipeline Management & Deal Insights
- ✓ Conversation Intelligence
- ✓ Workflow and Approvals Automation

Try for free ↗

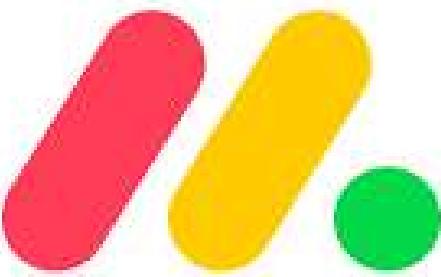


Choose the right plan for your team

Your Pro Trial has ended, choose your team plan

Choose team size: 5 seats

Yearly SAVE 18% | Monthly



Basic

\$12 seat / month

Total \$60 / month

Billed annually

Basic plan includes:

Unlimited customizable pipelines

Unlimited contacts

Standard

\$17 seat / month

Total \$85 / month

Billed annually

[Why Standard?](#)

Includes Basic, plus:

Advanced account, contact, & deal management

Pro

\$28 seat / month

Total \$140 / month

Billed annually

[Why Pro?](#)

Includes Standard, plus:

Sales forecasting

Email tracking & automations

Enterprise



For teams, businesses, organizations wanting to maximize growth and scale fast.

[Contact us](#)

Includes Pro, plus:

Hi there I'm the monday.com chatbot and I'm here to help.



Help

COMPARISON

| PLATFORM | Google Workspace |  |  |
|----------------|---|---|---|
| STARTING PRICE | 0 USD | 25 USD | 12 USD |
| SCALABILITY | Unlimited | Unlimited | Unlimited |
| INTERFACE | Simple setup and minimal learning curve | Requires extensive training | Easy to set up and customize workflows |



KEY FINDINGS

KEY FINDINGS

We offer Google-based sales pipeline system to:

STREAMLINE SALES PROCESS

MAKE DATA-DRIVEN DECISION

ENHANCE CUSTOMER RETENTION RATE

Solution featuring:

COST-EFFECTIVE

CLOUD-BASED

HIGHLY SCALABLE

HIGHLY CUSTOMIZABLE

THANK YOU!

Feel free to connect and contact us!

LAI JIEN WENG



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www.linkedin.com/in/jienweng

JANICE NG



www.linkedin.com/in/janice-ng-zhi-yan-21a829305