



Sales funnel analytics

Dental care centers

Extracted sales funnel data to cleanse, analyze and summarize, and draw meaningful insights on funnel performance and drivers of the trends

Identified key normalized metrics for each step of the funnel, i.e., leads, schedules, consults, starts (gross and net), and overall conversion, both by lead segment (based on credit worthiness), and in aggregate

Dental care company needs to conduct “root analysis” of its sales performance

Picture this...

You’re looking to extract, cleanse, analyze and summarize sales data to draw meaningful insights on funnel performance and drivers of the trends. Currently, you do not have clear visibility into the sales funnel due to complexity of the data and analytics nuances in developing robust performance metrics.

You turn to Accordion.

We partner with your team to extract sales funnel data to cleanse, analyze and summarize, and draw meaningful insights on funnel performance and drivers of the trends, including:

- 1) Developing a sales funnel analytics framework to track each step from marketing to net collections
- 2) Extracting the raw data and refined it into a clean structure to track the lead through its journey across various steps and departments
- 3) Identifying key normalized metrics for each step of the funnel, i.e., leads, schedules, consults, starts (gross and net), and overall conversion, both by lead segment (based on credit worthiness), and in aggregate
- 4) Drawing robust insights to identify drivers of funnel performance by each step, and providing recommendations to improve the overall conversion rates

Your value is enhanced.

You have improved conversion rates by 20 bps, which is equivalent to \$3 Mn in additional revenues. Your one-time data extraction, set-up, cleansing and analyses helped automate the process to track the sales funnel analytics on a weekly basis, which reduced overall TAT by 80%.

SALES FUNNEL ANALYTICS

KEY RESULT

- 20 bps improved conversion rates.
- \$3 Mn in additional revenues
- 80% overall TAT reduced

VALUE LEVERS PULLED

- Sales funnel analytics framework

Sales funnel analytics for a pe-owned network of dental care providers

Situation

- Client did not have clear visibility into its sales funnel due to complexity of the data and analytics nuances in developing robust performance metrics at each stage of the funnel and also by sales representatives
- Partnered with the client to extract the data, cleanse, analyze and summarize to draw meaningful insights on funnel performance and drivers of the trends

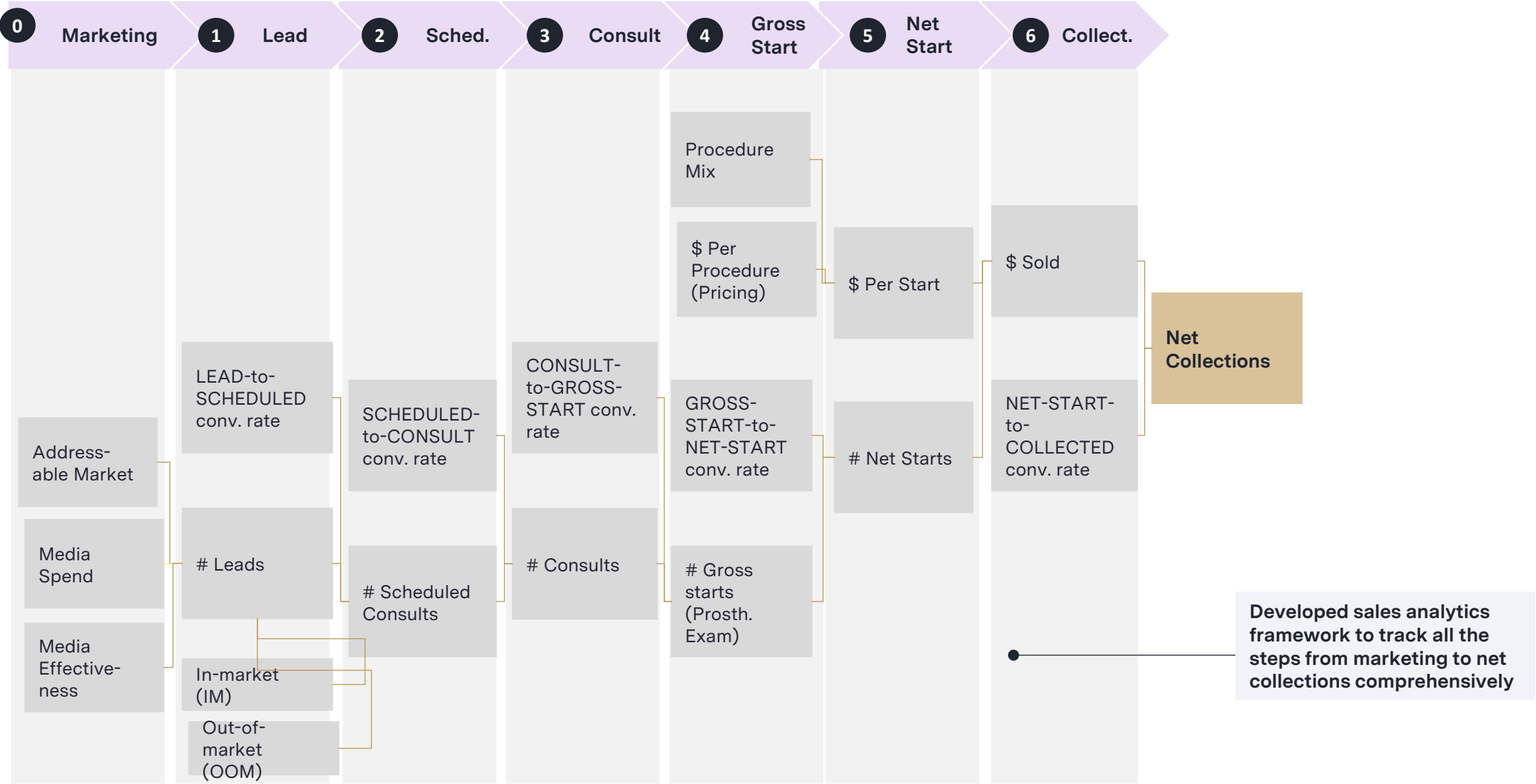
Accordion Value Add

- Developed a sales funnel analytics framework to track each step from Marketing to Net Collections
- Extracted the raw data and refined it into a clean structure so as to track the lead through its journey across various steps and departments
- Identified key normalized metrics for each step of the funnel, i.e., Leads, Schedules, Consults, Starts (Gross and Net), and overall conversion, both by lead segment (based on credit worthiness), and also in aggregate
- Drew robust insights to identify drivers of funnel performance by each step, and provided recommendations to improve the overall conversion rates

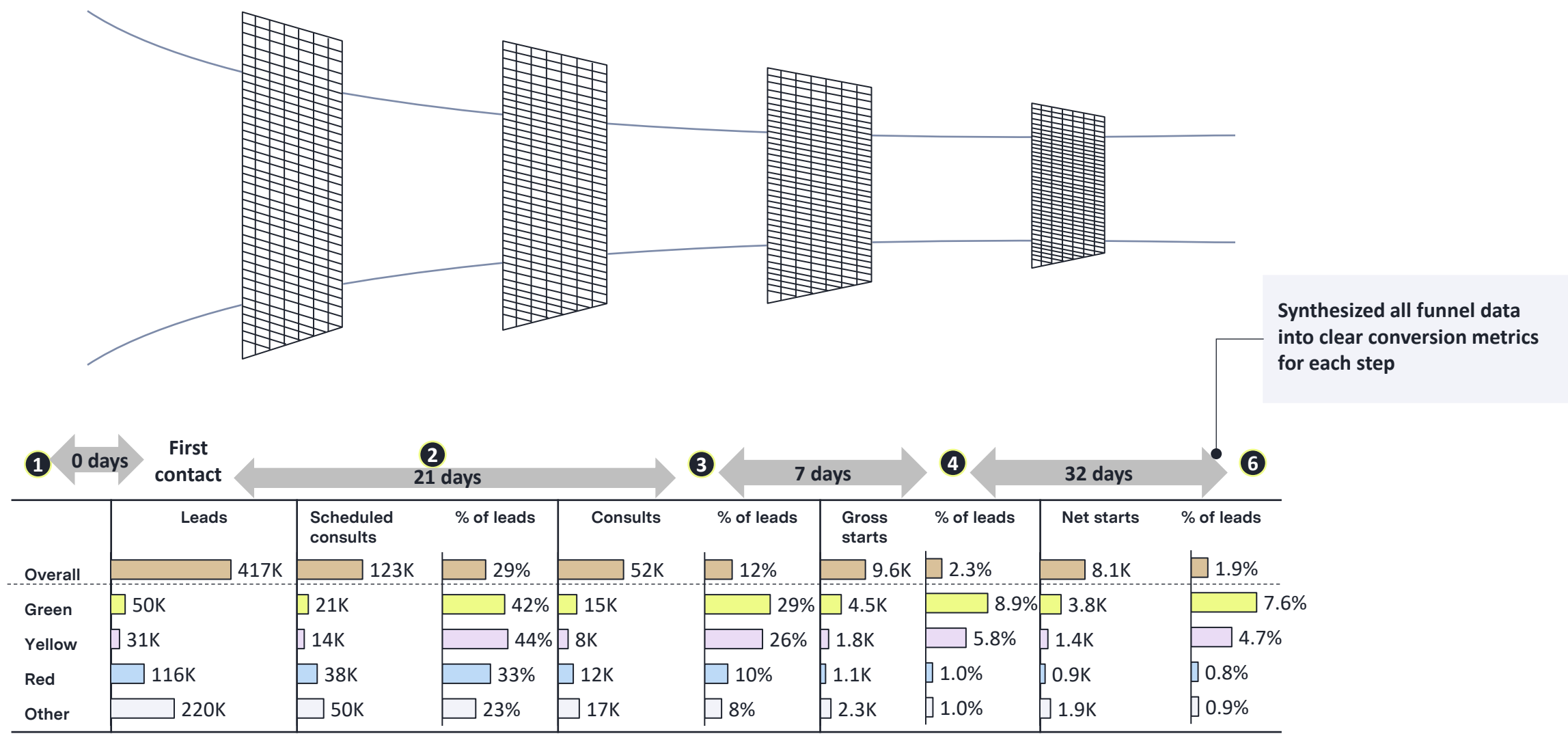
Impact

- Overall Conversion rates improved by 20 bps, which is equivalent to \$3 Mn in additional revenues
- The one-time data extraction, set-up, cleansing and analyses helped automate the process to track the sales funnel analytics on a weekly basis, which reduced overall TAT by 80%

Sales funnel analytics framework



Sales funnel conversion analyses



Sales funnel trends and drivers analyses

