CRM-ANALYTICS SQL REPORT

Lead KPI's

1. Total Lead

SELECT count(`Lead ID`) as total_leads FROM leads ;

```
3    -- Total lead
4 •  SELECT count(`Lead ID`) as total_leads FROM leads ;
5
6
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

total_leads
10000

2. Expected Amount from Converted Leads

SELECT SUM(CAST(REPLACE(REPLACE(o.`Expected Amount`, ',', ''), '$', '') AS DECIMAL(20, 2))) AS Total_Expected_Amount_Converted_Leads

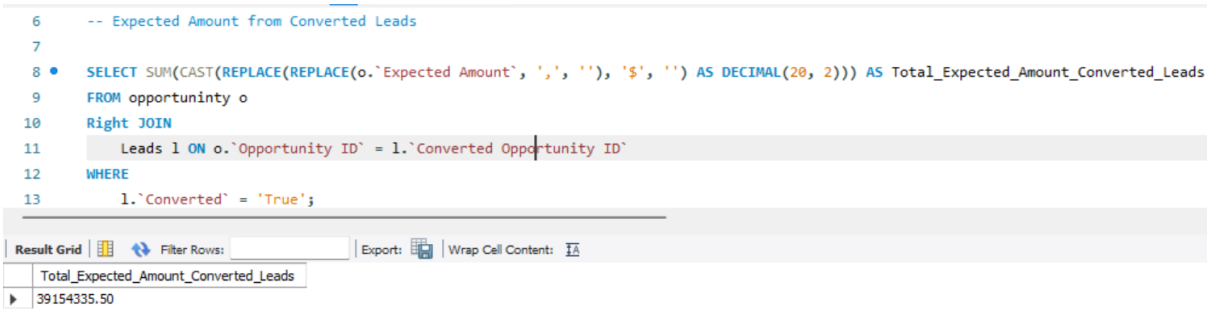
FROM opportuninty o

Right JOIN

Leads l ON o.`Opportunity ID` = l.`Converted Opportunity ID`

WHERE

l.`Converted` = 'True';



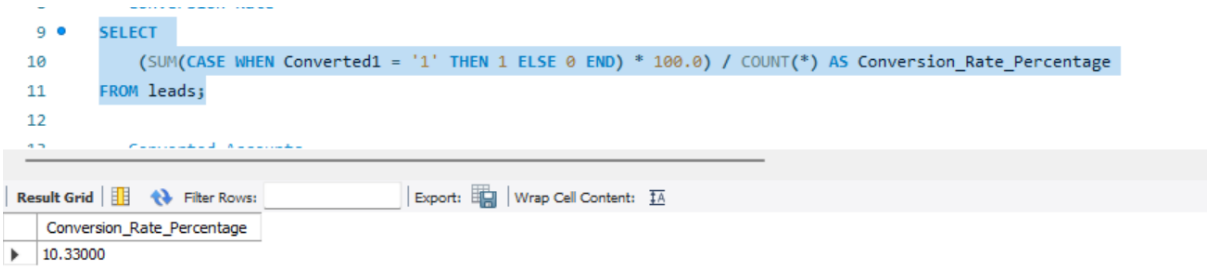
```
-- Expected Amount from Converted Leads

SELECT SUM(CAST(REPLACE(REPLACE(o.`Expected Amount`, ',', ''), '$', '') AS DECIMAL(20, 2))) AS Total_Expected_Amount_Converted_Leads
FROM opportuninty o
Right JOIN
    Leads l ON o.`Opportunity ID` = l.`Converted Opportunity ID`
WHERE
    l.`Converted` = 'True';
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Total_Expected_Amount_Converted_Leads
39154335.50

3. Conversion Rate

```
SELECT
    (SUM(CASE WHEN Converted1 = '1' THEN 1 ELSE 0 END) * 100.0) / COUNT(*) AS Conversion_Rate_Percentage
FROM leads;
```



```
SELECT
    (SUM(CASE WHEN Converted1 = '1' THEN 1 ELSE 0 END) * 100.0) / COUNT(*) AS Conversion_Rate_Percentage
FROM leads;
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Conversion_Rate_Percentage
10.33000

4. Converted Accounts

```
SELECT COUNT(*) AS Converted_Accounts
FROM leads
WHERE Converted1 = 1;
```

```
13      -- Converted Accounts
14
15      SELECT COUNT(*) AS Converted_Accounts
16      FROM leads
17      WHERE Converted1 = 1;
18
```

Result Grid | Filter Rows: | Export: | W

Converted_Accounts
1033

5. Converted Opportunities

SELECT

(SUM(CASE WHEN `# Converted Opportunities` = '1' THEN 1 ELSE 0 END))as Converted_Accounts

FROM leads;

```
19      --  Converted Opportunities
20      SELECT
21          (SUM(CASE WHEN `# Converted Opportunities` = '1' THEN 1 ELSE 0 END))as Converted_Accounts
22      FROM leads;
23
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Converted_Accounts
411

6. Lead By Source

SELECT Lead_Source, COUNT('Total Leads') AS Lead_Count

FROM leads

GROUP BY Lead_Source;

-- change name

ALTER TABLE leads

CHANGE `Lead Source` Lead_Source TEXT;

```
26      -- Lead By Source
27      SELECT Lead_Source, COUNT('Total Leads') AS Lead_Count
28      FROM leads
29      GROUP BY Lead_Source;
30
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Lead_Source	Lead_Count
Website	2195
Advertisement	613
Field Sales	577
Inside Sales	2786
Advertisment	11
Other	47
Prospecting Journey	440
Referral	20
Webinar	1091
Trade Show	1610
Eblasts	298
LinkedIn	6
Eblast	1
Sales Seminar	207
Training	7
Industry Event	18
Banner Ads	5

Result 5

7. **Lead By industry**

```
SELECT Industry, COUNT('Total Leads') AS Lead_Count
FROM leads
GROUP BY Industry
```

order by Lead_Count DESC;

```
40      --  Lead By industry
41 •    SELECT Industry, COUNT('Total Leads') AS Lead_Count
42      FROM leads
43      GROUP BY Industry
44      order by Lead_Count DESC;
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Industry	Lead_Count
Safety and Security	5357
Life Sciences	4120
Distributor	98
Other	83
	53
Biotechnology	47
Apparel	44
Banking	41
Agriculture	32
Chemicals	30
Communications	26
Environmental	25
Consulting	15
Oil & Gas	15
Construction	5
Telecommunications	2
Retail	2

Opportunity KPI's

8. Expected Amount

SELECT SUM(CAST(REPLACE(REPLACE(`Expected Amount`, ',', ''), '$', '') AS DECIMAL(20, 2))) AS Expected_Amount
FROM opportuninty;

```
12 •  SELECT SUM(CAST(REPLACE(REPLACE(`Expected Amount`, ',', ''), '$', '') AS DECIMAL(20, 2))) AS Expected_Amount
13    FROM opportuninty;
14
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Expected_Amount
184143968.97

9. Active Opportunities

select Count(Closed) as Active_Opportunities

from opportuninty

where Closed = 'False';

```
15    --  Active Opportunities - changed
16 •  select Count(Closed) as Active_Opportunities
17    from opportuninty
18    where Closed = 'False';
19
20    -- Conversion Rate
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

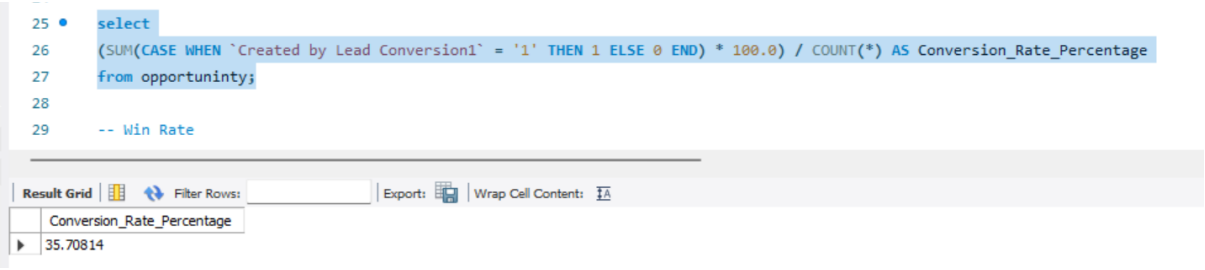
Active_Opportunities
1272

10. Conversion Rate

select

(SUM(CASE WHEN `Created by Lead Conversion1` = '1' THEN 1 ELSE 0 END) * 100.0) / COUNT(*) AS Conversion_Rate_Percentage

from opportuninty;

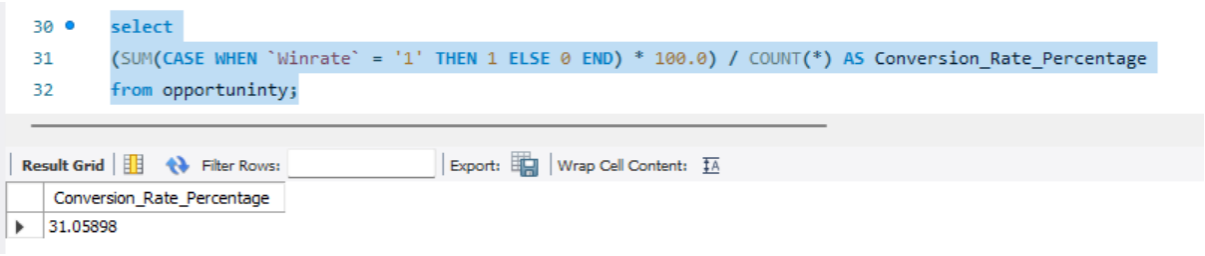


11.Win Rate

select

(SUM(CASE WHEN `Winrate` = '1' THEN 1 ELSE 0 END) * 100.0) / COUNT(*) AS Conversion_Rate_Percentage

from opportuninty;

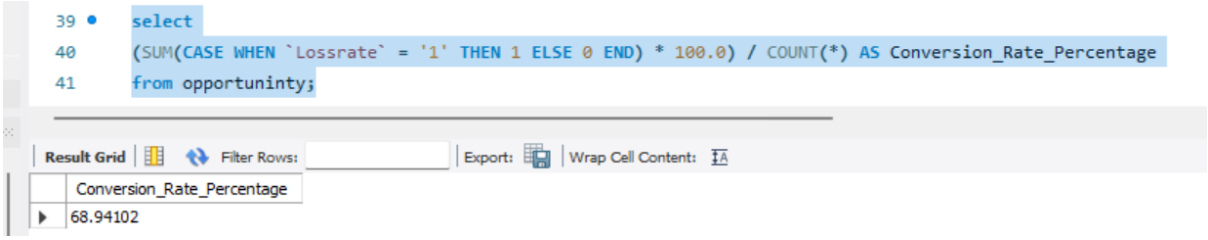


12.Loss

select

(SUM(CASE WHEN `Lossrate` = '1' THEN 1 ELSE 0 END) * 100.0) / COUNT(*) AS Conversion_Rate_Percentage

from opportuninty;



Trend Analysis

13.Running Total Expected Vs Commit Forecast Amount over Time

SELECT

`Fiscal Year`,

`Expected Amount`,

```
    SUM(`Expected Amount`) OVER (ORDER BY `Fiscal Year` ASC) AS Running_Total_Expected,
    SUM(`Forecast Q Commit1`) OVER (ORDER BY `Fiscal Year` ASC) AS
Running_Total_Commit_Forecast
FROM
    opportuninty
ORDER BY
    `Fiscal Year` ASC;
```

Fiscal Year	Expected Amount	Running_Total_Expected	Running_Total_Commit_Forecast
2011	0	55	0
2011	0	55	0
2011	0	55	0
2011	0	55	0
2011	0	55	0
2011	50,000.00	55	0
2011	5,00,000.00	55	0
2015		1508	0
2015	923	1508	0
2015	0	1508	0
2015	0	1508	0

Result 18

14. <u>Running Total Active Vs Total Opportunities over Time</u>

```
SELECT
    `Fiscal Year`,
    COUNT(*) AS Total_Opportunities,
    SUM(`Active Opp`) AS Active_Opportunities,
    SUM(COUNT(*)) OVER (ORDER BY `Fiscal Year` ASC) AS Running_Total_Opportunities,
    SUM(SUM(`Active Opp`)) OVER (ORDER BY `Fiscal Year` ASC) AS
Running_Total_Active_Opportunities
FROM
    opportuninty
GROUP BY
    `Fiscal Year`
ORDER BY
    `Fiscal Year` ASC;
```

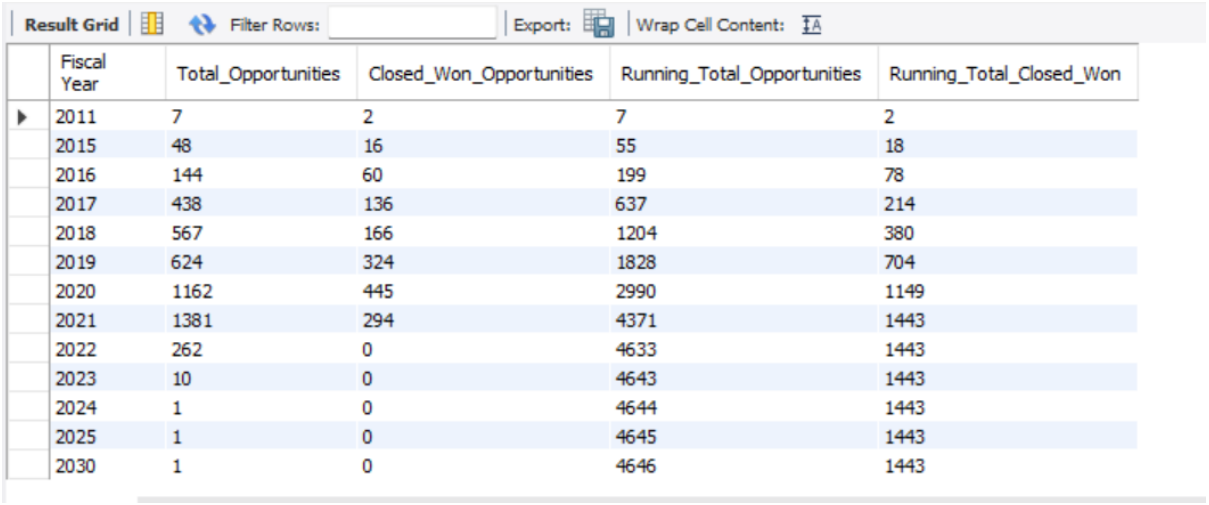
Fiscal Year	Total_Opportunities	Active_Opportunities	Running_Total_Opportunities	Running_Total_Active_Opportunities
2011	7	0	7	0
2015	48	0	55	0
2016	144	13	199	13
2017	438	171	637	184
2018	567	1	1204	185
2019	624	3	1828	188
2020	1162	103	2990	291
2021	1381	741	4371	1032
2022	262	232	4633	1264
2023	10	7	4643	1271
2024	1	1	4644	1272

Result 19

15. <u>Closed Won Vs Total Opportunities over Time</u>

```
SELECT
    `Fiscal Year`,
    COUNT(*) AS Total_Opportunities,
    SUM(CASE WHEN `stage` = 'Closed Won' THEN 1 ELSE 0 END) AS
Closed_Won_Opportunities,
    SUM(COUNT(*)) OVER (ORDER BY `Fiscal Year` ASC) AS Running_Total_Opportunities,
    SUM(SUM(CASE WHEN `stage` = 'Closed Won' THEN 1 ELSE 0 END)) OVER (ORDER BY
`Fiscal Year` ASC) AS Running_Total_Closed_Won
FROM
    opportuninty
GROUP BY
    `Fiscal Year`
ORDER BY
```

`Fiscal Year` ASC;



Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Fiscal Year	Total_Opportunities	Closed_Won_Opportunities	Running_Total_Opportunities	Running_Total_Closed_Won
2011	7	2	7	2
2015	48	16	55	18
2016	144	60	199	78
2017	438	136	637	214
2018	567	166	1204	380
2019	624	324	1828	704
2020	1162	445	2990	1149
2021	1381	294	4371	1443
2022	262	0	4633	1443
2023	10	0	4643	1443
2024	1	0	4644	1443
2025	1	0	4645	1443
2030	1	0	4646	1443

16. <u>Closed Won vs Total Closed over Time</u>

```
SELECT
    `Fiscal Year`,
    SUM(CASE WHEN `Closed` = 'True' THEN 1 ELSE 0 END) AS Total_Closed_Opportunities,
    SUM(CASE WHEN `Stage` = 'Closed Won' THEN 1 ELSE 0 END) AS
Closed_Won_Opportunities,
    SUM(SUM(CASE WHEN `Closed` = 'True' THEN 1 ELSE 0 END)) OVER (ORDER BY `Fiscal
Year` ASC) AS Running_Total_Closed_Opportunities,
    SUM(SUM(CASE WHEN `Stage` = 'Closed Won' THEN 1 ELSE 0 END)) OVER (ORDER BY
`Fiscal Year` ASC) AS Running_Total_Closed_Won
FROM
    opportuninty
GROUP BY
    `Fiscal Year`
ORDER BY
```

`Fiscal Year` ASC;

Fiscal Year	Total_Closed_Opportunities	Closed_Won_Opportunities	Running_Total_Closed_Opportunities	Running_Total_Closed_Won
2011	7	2	7	2
2015	48	16	55	18
2016	131	60	186	78
2017	267	136	453	214
2018	566	166	1019	380
2019	621	324	1640	704
2020	1059	445	2699	1149
2021	640	294	3339	1443
2022	30	0	3369	1443
2023	3	0	3372	1443
2024	0	0	3372	1443
2025	1	0	3373	1443
2030	1	0	3374	1443

Result 21

17. <u>Expected Amount by Opportunity Type</u>

SELECT `Opportunity Type`, sum(Amount) AS Amount_genrated

FROM opportuninty

GROUP BY `Opportunity Type`;

```
50 • SELECT `Opportunity Type`, sum(Amount) AS Amount_genrated
51   FROM opportuninty
52   GROUP BY `Opportunity Type`;
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Opportunity Type	Amount_genrated
	1007631891.1100004
Safety and Security Opportunity	13963187.25
Existing Business	210000
New Business	710000

18. Opportunities by Industry

SELECT `Industry`, count(CASE WHEN `Active Opp` = '1' THEN 1 ELSE 0 END) AS total_opp
FROM opportuninty
GROUP BY `Industry`
ORDER BY total_opp DESC ;

```sql
SELECT `Industry`, count(CASE WHEN `Active Opp` = '1' THEN 1 ELSE 0 END) AS total_opp
FROM opportuninty
GROUP BY `Industry`
ORDER BY total_opp DESC ;
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Industry	total_opp
Biopharma/Pharmaceuticals	1143
State and Local	558
	321
International	264
Federal	231
Communications	229
Energy	194
Military	187
Academia	182
Biotechnology	174
Agriculture	164
Telecommunications	137
Construction	112
Banking	108

Additional Key point's

- **actual difference between expected amount and Actual amount**

```sql
SELECT
   `Opportunity Type`,

   SUM(`Expected Amount`) AS Expected_Amount,
   SUM(Amount) AS Amount_generated,
   SUM(`Expected Amount`) - SUM(Amount) AS difference
FROM
   opportuninty
GROUP BY
```

`Opportunity Type`;

```
60  SELECT
61      `Opportunity Type`,
62      SUM(`Expected Amount`) AS Expected_Amount,
63      SUM(Amount) AS Amount_generated,
64      SUM(`Expected Amount`) - SUM(Amount) AS difference
65  FROM
66      opportuninty
67  GROUP BY
68      `Opportunity Type`;
69
70  -- Opportunities by Industry
```

Result Grid | Filter Rows: | Export: | Wrap Cell Content:

Opportunity Type	Expected_Amount	Amount_generated	difference
	148593.46000000005	1007631891.1100004	-1007483297.6500003
Safety and Security Opportunity	810	13963187.25	-13962377.25
Existing Business	50	210000	-209950
New Business	5	710000	-709995

Result 27

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