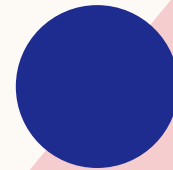
The background features a large white semi-circle at the top, with a light blue area on the left and a light pink area on the right. Below the white semi-circle is a large, solid dark blue shape that fills the bottom half of the frame.

CRM DATA CHAMPION – FUNNEL DESIGN & CRM STRUCTURING




DEEPTHOUGHT FELLOWSHIP SIMULATION – ROUND 2 ASSIGNMENT

Poornima KC

July 4, 2025



AGENDA – PART1

- ✓  Sales Funnel Design: Defining clear qualification stages
- ✓  CRM Blueprint: Core fields, automations & dashboards
- ✓  How this builds LTV/CAC efficiency

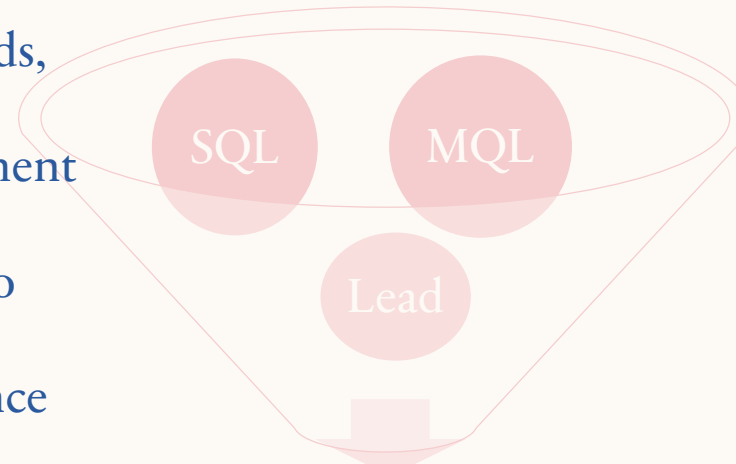
THE CURRENT PROBLEM

- ✓ MSME wants to grow: ₹1–5 Cr revenue, good word-of-mouth so far
- ✓ New paid campaigns = more leads but unqualified, untracked
- ✓ CAC rising, sales & marketing blaming each other
- ✓ CRM exists but is just a contact dump — no funnel, no logic

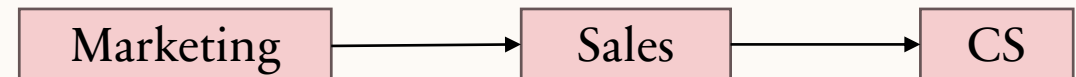
SALES FUNNEL DESIGN – B2B SAAS SALES CYCLE

Lead → MQL → SQL → Opp. → Cust.

- ✓ **Lead:** New contact via ads, outreach, website
- ✓ **MQL:** ICP fit & engagement confirmed
- ✓ **SQL:** Ready to buy; demo done, budget clear
- ✓ **Opportunity:** High chance to close, revenue forecast
- ✓ **Customer:** Deal closed, onboarding starts



Ownership Flow



These views ensure that Sales, Growth, and CEO teams see only what they need — building trust and clarity



QUALIFICATION CRITERIA & OWNERSHIP

Stage	Criteria to Upgrade	Owner
Lead → MQL	Engaged content, ICP match	Marketing
MQL → SQL	Demo booked, decision-maker engaged	Sales
SQL → Opportunity	High likelihood, negotiation in process	Sales
Opportunity → Customer	Signed contract, payment done	Sales → CS

CRM CORE DATA FIELDS

- ✓ **Lead Source** (Ad, Referral, LinkedIn, Website)
- ✓ **Company & Industry**
- ✓ **Contact Person Name & Role**
- ✓ **Deal Stage**
- ✓ **Lead Score**
- ✓ **Last Engagement Date**
- ✓ **Notes/Interactions**




Why:

This shows what key information the CRM must hold to support funnel qualification and smooth lead hand-offs.

CRM AUTOMATIONS & WORKFLOWS

- ✓ Auto-tagging leads by source & campaign
- ✓ Lifecycle stage auto-update based on activity
- ✓ Reminders to follow up if no engagement in X days
- ✓ Auto-assign lead owner (Sales Rep) when SQL

CRM BLUEPRINT – DASHBOARD VIEWS





User	Dashboard Focus
Sales Rep 	Daily tasks, hot SQLs, follow-ups
Growth Manager 	Funnel conversion %, CAC vs LTV trends
CEO 	Revenue forecast, channel ROI, CAC trends








FUNNEL & CRM BLUEPRINT SUMMARY

- ✓ 🔍 **Clear Funnel Stages:**
Defined Lead → MQL → SQL → Opportunity → Customer flow, with ownership for Marketing, Sales, and CS.
- ✓ 📊 **CRM Blueprint:**
Core fields like Lead Source, Last Engagement, Lead Score — ensure data quality for insights.
- ✓ ⚙️ **Automations & Dashboards:**
Auto-tagging, lifecycle updates, reminders, owner assignment — plus tailored dashboards for Sales, Growth, CEO.
- ✓ ✅ **System Thinking:**
Funnel + CRM = No more lost leads, better CAC control, and founder visibility.






PART 2 - LEAD NURTURING TRACKS - OVERVIEW

- ✓  Segments leads into High, Mid & Low Intent
- ✓  Uses multi-channel outreach: Email, WhatsApp, LinkedIn
- ✓  Delivers relevant content to re-engage
- ✓  Tracks clear success metrics for each stage

HIGH-INTENT LEAD NURTURE

- ✓  *Who:* Booked demo but didn't convert
- ✓  *Frequency:* Follow-up every 2–3 days
- ✓  *Channels:* Email + LinkedIn
- ✓  *Content:* Case studies, limited-time offers, success stories
- ✓  *Metric:* Demo re-booked, direct reply





MID-INTENT LEAD NURTURE

- ✓  *Who:* Downloaded a resource, joined a webinar
- ✓  *Frequency:* Weekly touchpoints
- ✓  *Channels:* Email + WhatsApp
- ✓  *Content:* How-to guides, industry trends, founder's note
- ✓  *Metric:* Click rate, reply rate

LOW-INTENT LEAD NURTURE

- ✓  *Who:* Newsletter subscribers
- ✓  *Frequency:* Monthly newsletter
- ✓  *Channels:* Email only
- ✓  *Content:* Educational blogs, community invites, upcoming events
- ✓  *Metric:* Open rate, click-throughs, new sign-ups

AI TOOLS FOR PERSONALISATION

- ✓  ChatGPT or HubSpot AI for personalised messages
- ✓  Auto-segment based on user behaviour
- ✓  Smart reminders for re-engagement
- ✓  Next best action suggestions to boost replies

KEY MESSAGE

What to Say for Part 2:

Each nurturing track is tailored to the lead's intent — so we send the right message, on the right channel, at the right time. AI tools help personalize at scale and keep the pipeline warm.

HIGH-INTENT LEAD NURTURE (BOOKED DEMO)

- ✓ **Frequency and Channels:** 1–2 follow-ups per week via Email + WhatsApp
- ✓ **Content:** Case studies, success stories, special offer
- ✓ **Success Metric:** Demo rescheduled or re-engagement rate

MID-INTENT LEAD NURTURE (RESOURCE/WEBINAR)

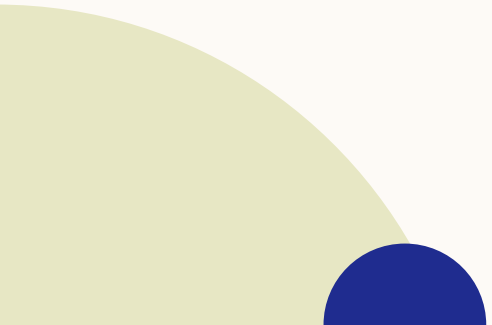
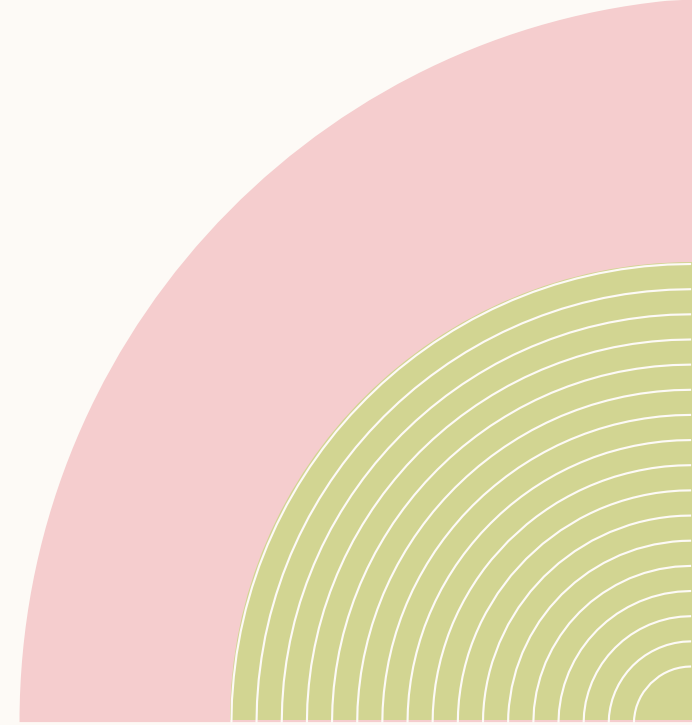
- ✓ **Frequency & Channels:** 1 Email per week + LinkedIn touchpoint
- ✓ **Content:** Educational blogs, relevant case study, light offer
- ✓ **Success Metric:** Click – throughs, replies, next action booked

LOW-INTENT LEAD NURTURE (NEWSLETTER)

- ✓ **Frequency & Channels:** Monthly Email Newsletter
- ✓ **Content:** Industry insights, founder's note, soft CTA
- ✓ **Success Metric:** open rate, re-engagement click

SCALING WITH AI TOOLS

- ✓ Use AI to segment by behaviour & persona
- ✓ Auto-personalise email copy at scale
- ✓ A/B test content for better engagement



NURTURING DESIGN KEY TAKEAWAY



- ✓ 3 tailored nurturing tracks keep the pipeline warm
- ✓ Right message → Right audience → Right time
- ✓ AI supports scale without losing human touch

PART 3 - FUNNEL ANALYTICS – CHANNEL PERFORMANCE

Stage	Leads	Cost Incurred	Conversions	Conversion Rate	Cost per Conversion
Facebook Ads	3000	₹90,000	30	1%	₹3,000
Email Campaign	1000	₹10,000	25	2.5%	₹400
LinkedIn DMs	500	₹25,000	10	2%	₹2,500

Key Insight:

- ✓ Facebook Ads has high cost & lowest conversion efficiency (₹3,000 per conversion vs. Email ₹400).
- ✓ So, Facebook is the **weak channel** you need to fix.

🗨️ What to Say:

“This snapshot highlights where our CAC is highest. Facebook Ads are expensive with the lowest conversion rate — we need to test improvements here first.”

EXPERIMENTS TO OPTIMIZE FACEBOOK ADS

- ✓ **Refine Audience Targeting:** Use lookalike audiences based on top customers to get more qualified clicks.
- ✓ **Test Ad Creatives:** A/B test different headlines & CTAs to boost click-through & conversion.

Bonus:

“Run small budget splits to validate what works before scaling.”

What to Say:

“These experiments aim to reduce wastage and lift conversions — tackling the root of high CAC.”

WEEKLY CAC:LTV DASHBOARD

Key Metrics to Track:

- ✓ CAC by Channel 💰
- ✓ Total LTV (*Avg deal size × repeat purchase rate*)
📈
- ✓ Conversion Rate by Funnel Stage 🔄
- ✓ ROI per Channel 📊

Who Sees It Weekly:

- ✓ 👥 Growth Manager
- ✓ 🧑💼 Founder/CEO
- ✓ 🤝 Sales Team

This dashboard keeps everyone aligned on spend efficiency.

We watch CAC vs. LTV trends weekly — so we can double down on winning channels and fix weak ones

RECAP: FUNNEL ANALYTICS & CAC

- ✓ 💡 **Facebook Ads underperform:** highest CAC, lowest conversion
- ✓ 📋 **2 focused experiments:** audience and creative A/B tests
- ✓ 📊 **Weekly dashboard:** track CAC:LTV and channel ROI

Our aim: Cut CAC by 40% this quarter with data-led experiments & transparent tracking.

STRATEGIC SUMMARY: BUILDING FUNNELS & TELLING THE STORY

📁 When I design a funnel, I always think about one thing: Does it make sense for the people using it — and for the people inside it? I believe a good funnel must feel real. It should guide every lead clearly from first touch to final deal, but stay flexible enough for human unpredictability.

🔍 For me, systems are only useful when they adapt. I balance structure with space for real conversations and decisions. A rigid system breaks; a responsive one grows.

📊 Data storytelling is how I connect numbers to action. Anyone can share a dashboard — but I want my dashboards to make people stop, see what's really happening, and act. It's not just about past performance — it's about what we do next.

🤖 AI is my smart assistant — not my replacement. I use it to scale personalization, test new ideas faster, and catch patterns I might miss. But the core decisions always stay human.

🌱 In the end, I see myself as more than a data analyst. I'm here to protect clarity, build trust, and help the team **grow** row with systems that truly work in the real world.

This is how I think as a Data Champion — I build systems that stay human, insights that guide action, and stories that keep everyone aligned.

THANK YOU

💡 “Excited to learn, build, and grow as a Data Champion.”

🔗 “Ready to design real systems that help teams win together.”

Poornima KC