DT Fellowship Simulation Assignment

Part 1: Funnel Design + CRM Structuring

1.Funnel Design – B2B SaaS (4–6 week cycle)

Stage	Definition	Criteria to Qualify	Owned By
Lead	Someone who shows interest or gets contacted	Filled a form, replied to outreach	Marketing
MQL	Shows potential and fits the target customer profile	Interacted with marketing content (e.g., viewed 2 resources)	Marketing
SQL	Ready to talk to sales, and has buying power	Completed discovery call + confirmed budget & need	Sales
Customer	Has bought the product and started using it	Signed contract and on-boarding began	Sales → CS
Bonus: Power User	Actively using the product and getting value	Finished key tasks during first 7 days	Customer Success

2.CRM Configuration Blueprint

✧ **Essential Fields (Per Contact)**

SL.No.	Field Name	Description
1	Full Name	Name of the lead
2	Company Name	Business or organization the lead represents
3	Email & Phone Number	Contact info for communication
4	Lead Source	Where the lead came from (e.g. FB Ads, LinkedIn)
5	Industry	Sector the lead's company belongs to
6	Job Title	Role — helps gauge decision-making power
7	Lead Stage	Current funnel stage (Lead, MQL, SQL, etc.)
8	Last Engagement Date	Last time any interaction was recorded
9	Deal Size (Estimated)	Potential revenue from lead
10	Owner (Team Member)	Person responsible for nurturing the lead
11	Pain Points / Needs	Summary of challenges or requirements
12	Status	Lead progress (Active, Converted, Lost, etc.)

✧ **CRM Automations**

Tagging Logic

- Leads from Linked-In outreach → Auto-tagged as "Outbound"

Lifecycle Stage Updates

- Booked demo → Automatically upgraded to **MQL**
- Proposal accepted → Automatically upgraded to **SQL**

Reminders & Follow-ups

- No activity in last 3 days → Reminder ping to Sales
- No response after 7 days → Auto-send nurturing email

Lead Scoring Automation

- High interaction + relevant industry → High score
- Low interaction → Downgrade to "Cold Lead" list

Notifications to Owner

- Lead opens email or clicks link → Instant alert to owner

✧ Dashboard Views

■ For Sales Reps

- **My Leads**: See who's assigned to you
- **Follow-ups Today**: Know exactly who to call
- **Hot Leads**: Leads with high score + recent activity
- **Funnel Status**: View where your leads are in the pipeline

➢ **Purpose**: Help sales reps take quick action without confusion.

■ For Growth Manager

- **Channel Performance**: Compare Facebook, Email, LinkedIn
- **Conversion Stats**: See how many leads move from one stage to next
- **Cost Analysis**: Track CAC (Cost per Acquisition) by source
- **Content Metrics**: See which emails get the most replies

➢ **Purpose**: Give insights into what's working and where to improve.

■ For CEO

- **Weekly Funnel Snapshot**: From leads → customers
- **Top Channels**: Best performing sources
- **CAC vs LTV Graph**: Money spent vs revenue generated
- **Team Effectiveness**: Conversions per sales rep
- **Stuck Leads**: Where leads aren't moving

➢ **Purpose**: Give clear visibility into growth, ROI, and team output.

Part 2: Nurturing Mechanism Design

Intent Level	Contact Frequency	Channels Used	Content Ideas	Success Goal
High Intent	2–3 times per week	Email, WhatsApp, LinkedIn	Case study, limited-time offer, founder message	Demo rescheduled or conversion
Mid Intent	2 emails/week + 1 LinkedIn ping	Email, LinkedIn	Blog on pain points, webinar replay, use-case video	Demo signup or re-engagement
Low Intent	1 email/week	Email only	Newsletter, light case study, founder story	Move to mid intent actions

✧ AI Tools Used

- **ChatGPT** – Write personalized follow-ups and summaries
- **Lavender** – Improve cold email effectiveness
- **HubSpot AI** – Automate sequences and predict lead behavior
- **Mailchimp AI** – Test newsletter subject lines
- **Zapier** – Segment leads automatically based on behavior

Part 3: Funnel Analytics & CAC Optimization

1.Underperforming Channel: Facebook Ads

- ◆ Highest spend (₹90,000), lowest conversion rate (1%)
- ◆ Poor lead quality due to broad targeting or weak ad messaging
- ◆ Cost per conversion is the highest (₹3,000)

2.Two Fixes to Improve Facebook Ads

A) Refine Targeting with Lookalike Audiences

- Use profiles of existing customers to reach similar users
- Focus on founders, decision-makers, relevant industries

B) **A/B Test Ad Messaging**

- Run two types
  - Pain-focused: “Struggling to convert leads?”
  - Proof-based: “Clients grew 3x with our platform!”
- Shift budget to the one with better results

3. CAC : LTV Dashboard Reccomendation

Metric	Reviewed By
CAC (per channel + total)	Growth Manager
LTV (average per customer)	CEO + Sales Head
Funnel Conversion %	Marketing + Sales
Lead Drop-off Points	Growth Manager
ROI by Source	CEO

- **Review Frequency**: Weekly
- **Purpose**: Track efficiency, identify what's working, and guide smarter budget decisions.

Part 4: Strategic Summary

My funnel philosophy rests on clarity, empathy, and iteration. Funnels should map to human behavior, not manipulate it — guiding prospects with logic while responding to real-world signals. When people feel understood, they move.

I believe systems must blend structure with emotional intelligence. A CRM isn't just a database — it's the nervous system of the business, pulsing with engagement, intent, and opportunity. Funnel design should evolve through feedback, not assumptions.

Data storytelling is what turns metrics into movement. It aligns teams by translating dashboards into decisive action. Leadership isn't about knowing the numbers — it's about knowing what those numbers mean.

My mission is to transform operational chaos into clarity. To turn friction into flow. To turn data into growth.