

LEAD DASHBOARD

6.LEAD BY SOURCE

```
26 from `opportunitytable`
27 where stage = "Closed won";
28
29 #6.lead by source
30 • SELECT `Lead Source`, COUNT(*) AS Lead_Count
31 FROM `lead`
32 GROUP BY `Lead Source`
33 ORDER BY Lead_Count DESC;
34
35 #7. lead by industry
36 • SELECT `Industry`, COUNT(*) AS Lead_Count
37 FROM `lead`
38 GROUP BY `Industry`
```

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

	Lead Source	Lead_Count
►	Inside Sales	2786
	Website	2195
	Trade Show	1610
	Webinar	1091
	Advertisement	613

Result 1 x

7. LEAD BY INDUSTRY

```
36 • SELECT `Industry`, COUNT(*) AS Lead_Count
37 FROM `lead`
38 GROUP BY `Industry`
39 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

8.LEAD BY STAGE

```

40
41 #8.lead by stage
42 • SELECT `Status`, COUNT(*) AS Lead_Count
43 FROM `lead`
44 GROUP BY `Status`
45 ORDER BY Lead_Count DESC;
46
47
48 #Opportunity values

```

Result Grid Filter Rows: <input type="text"/> Export: Wrap Cell Co		
	Status	Lead_Count
▶	Nurturing	5303
	Prospect	2154
	Converted	907
	Disqualified	690
	MQL	591
	SQL	351
	Qualified	3
	Untouched	1

OPPORTUNITY DASHBOARD

1.EXPECTED AMOUNT

```

48 #Opportunity values
49 #1.Expected Amount
50 • SELECT
51     SUM(`Expected Amount`) AS TotalExpect
52 FROM
53     `opportunitytable`;
54
55 #2.Active opportunities
56 • SELECT

```

Result Grid Filter Rows: <input type="text"/> Export:	
	TotalExpectedAmount
▶	184144092

54	
55	#2.Active opportunities
56	• SELECT
57	COUNT(*) AS ActiveOpportunities
58	FROM
59	`opportunitytable`
60	WHERE
61	`Stage` NOT IN ('Closed Won', 'Closed Lost');
62	
63	#3.Conversion rate

Result Grid			Filter Rows:	<input type="text"/>	Export:		Wrap Cell C
	ActiveOpportunities						
▶	1115						

2.

3.CONVERSION RATE

63	#3.Conversion rate
64	• SELECT
65	(COUNT(CASE WHEN stage = 'Closed Won' THEN 1 END) * 100.0) / COUNT(*) AS conversion_rate_percent
66	FROM `opportunitytable`;
67	
68	#4.win rate

Result Grid			Filter Rows:	<input type="text"/>	Export:		Wrap Cell Content: fA
	conversion_rate_percent						
▶	32.14524						

4.WIN RATE

68	#4.win rate
69	• SELECT
70	(COUNT(CASE WHEN stage = 'Closed Won' THEN 1 END) * 100.0) /
71	COUNT(CASE WHEN stage IN ('Closed Won', 'Closed Lost') THEN 1 END) AS win_rate_percent
72	FROM `opportunitytable`;
73	

Result Grid			Filter Rows:	<input type="text"/>	Export:		Wrap Cell Content: fA
	win_rate_percent						
▶	42.76823						

5.LOSS RATE

```

74 #5.Loss rate
75 • SELECT
76     (COUNT(CASE WHEN stage = 'Closed Lost' THEN 1 END) * 100.0) / COUNT(*) AS loss_rate_percent
77 FROM `opportunitytable`;
78

```

loss_rate_percent
43.01626

6.EXPECTED VS FORECAST

```

79 #6.Expected vs Forecast
80 • SELECT
81     `Created Date`,
82     SUM(`Expected Amount`) OVER (ORDER BY `Created Date`) AS RunningExpected,
83     SUM(`Amount`) OVER (ORDER BY `Created Date`) AS RunningForecast
84 FROM
85     `opportunitytable`
86 WHERE
87     `Created Date` IS NOT NULL
88 ORDER BY
89     `Created Date`;
90

```

Created Date	RunningExpected	RunningForecast
01-01-2019 20:39	4907	98134
01-02-2017 14:07	4907	122834
01-02-2018 16:14	77507	195434
01-02-2018 18:21	77556	195483
01-02-2019 18:17	77934	195861
01-02-2019 19:13	1309574	1427501
01-02-2019 19:50	1309574	1509451

7.ACTIVE VS TOTAL OPPORTUNITY

```

91 #7.Active vs Total Opportunities
92 • SELECT
93     COUNT(*) AS TotalOpportunities,
94     SUM(CASE
95         WHEN `Stage` NOT IN ('Closed Won', 'Closed Lost') THEN 1
96         ELSE 0
97     END) AS ActiveOpportunities
98 FROM
99     `opportunitytable`;
100
101 #8.Closed won vs Total Opportunities
102 • SELECT
103     COUNT(*) AS TotalOpportunities,

```

TotalOpportunities	ActiveOpportunities
4489	1115

8.CLOSED VS TOTAL OPPORTUNITIES

```

101 #8.Closed won vs Total Opportunities
102 • SELECT
103     COUNT(*) AS TotalOpportunities,
104     SUM(CASE
105         WHEN `Stage` = 'Closed Won' THEN 1
106         ELSE 0
107     END) AS ClosedWon
108 FROM
109     `opportunitytable`;
110

```

	TotalOpportunities	ClosedWon
▶	4489	1443

9.TOTAL WON VS CLOSED WON

```

111 #9total won vs closed won
112 • SELECT
113     SUM(CASE
114         WHEN `Stage` IN ('Closed Won', 'Closed Lost') THEN 1
115         ELSE 0
116     END) AS TotalClosed,
117     SUM(CASE
118         WHEN `Stage` = 'Closed Won' THEN 1
119         ELSE 0
120     END) AS ClosedWon
121 FROM
122     `opportunitytable`;
123

```

	TotalClosed	ClosedWon
▶	3374	1443

10.EXPECTED AMOUNT BY OPPORTUNITY TYPE

```





123
124 #10. Expected amount by opportunity type
125 • SELECT
126     `Opportunity Type`,
127     SUM(`Expected Amount`) AS Total_Expected
128 FROM `opportunitytable`
129 GROUP BY `Opportunity Type`;
130

```

Opportunity Type	Total_Expected
▶	179388638
Safety and Security Opportunity	4205454
Existing Business	50000
New Business	500000

11.OPPORTUNITY BY INDUSTRY

```
130
131 #11, Opportunities by Industry
132 • SELECT
133     industry,
134     COUNT(*) AS opportunity_count
135 FROM `opportunitytable`
136 GROUP BY industry
137 ORDER BY opportunity_count DESC;
```

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

	industry	opportunity_count
▶	Biopharma/Pharmaceuticals	1143
	State and Local	558
		321
	International	264
	Federal	231
	Communications	189
	Military	187
	Academia	182