

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable	Insights if any	Pattern of Insight
Technology Primary	An unusually large number of opportunities come from ERP Implementation category and they have a better than average opportunity conversion rate	Significant Outliers
B2B Sales Medium	Most Opportunities are from Marketing and Enterprise Sellers with the Enterprise Sellers having a better than average opportunity conversion rate.	Significant Outliers
Client Revenue Sizing	An unusually large number of opportunities come from clients who are less in revenue size(100K or less)	Significant Outliers
Opportunity Sizing	The opportunity conversion rate is significantly higher for clients with potential revenue in 0-30K range.	Surprising Comparison
Business from Client Last Year	The conversion rate is higher for existing customers despite the number of opportunities unusually large from newer customers	Surprising Comparison/Significant Outliers

PART III A : Generating Insights

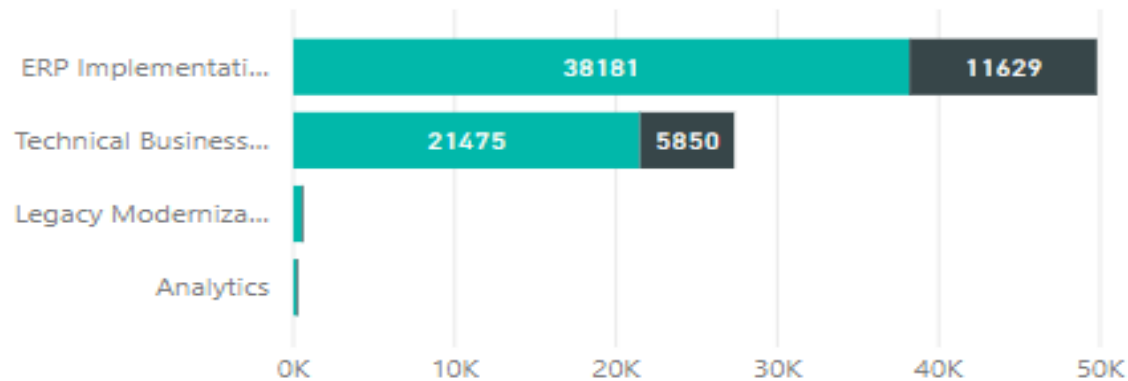
Sales Pipeline Conversion at a SaaS Startup

Variable under consideration: Technology Primary

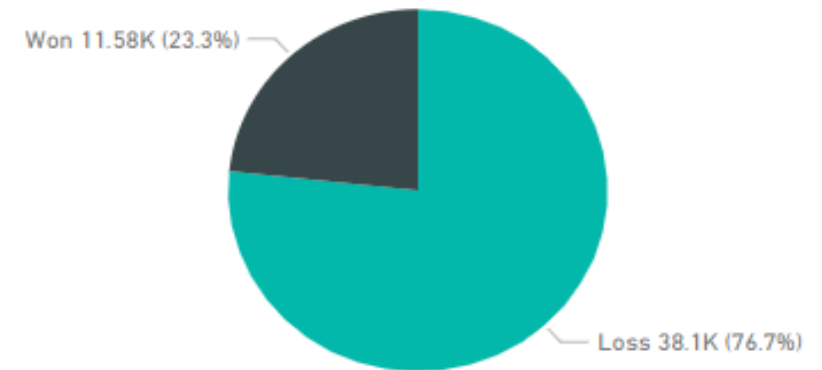
An unusually large number of opportunities come from ERP Implementation category and they have a better than average opportunity conversion rate

Count of Opportunity ID by Technology Primary and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III A : Generating Insights

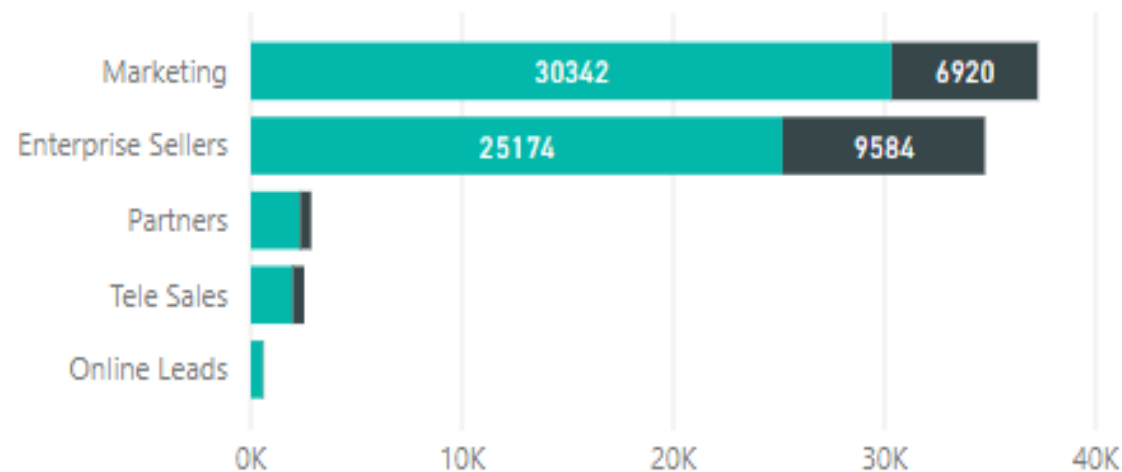
Sales Pipeline Conversion at a SaaS Startup

Variable under consideration: B2B Sales Medium

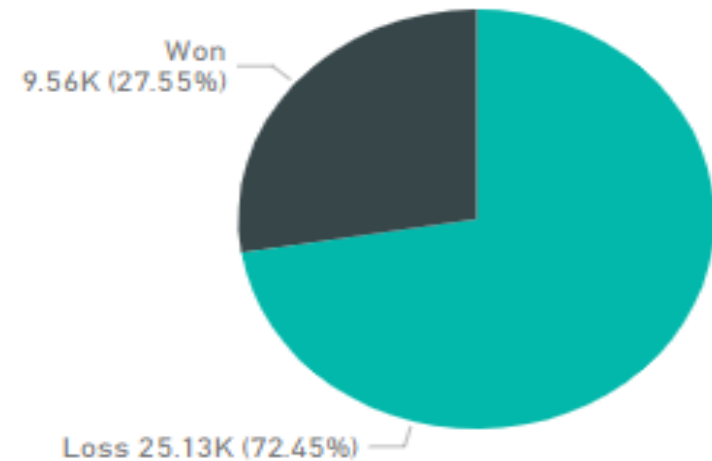
Most Opportunities are from Marketing and Enterprise Sellers with the Enterprise Sellers having a better than average opportunity conversion rate.

Count of Opportunity ID by B2B Sales Medium and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III A : Generating Insights

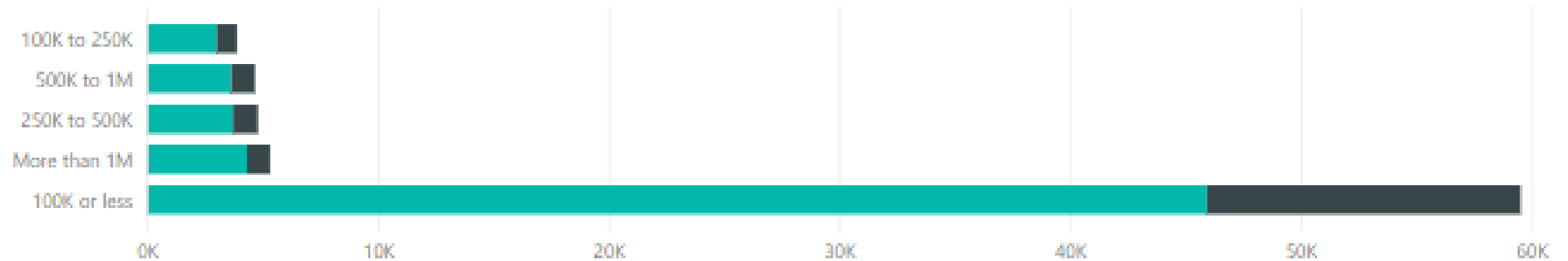
Sales Pipeline Conversion at a SaaS Startup

Variable under consideration: Client Revenue Sizing

An unusually large number of opportunities come from clients who are less in revenue size(100K or less)

Count of Opportunity ID by Client Revenue Sizing and Opportunity Status

Opportunity Status ● Loss ● Won



PART III A : Generating Insights

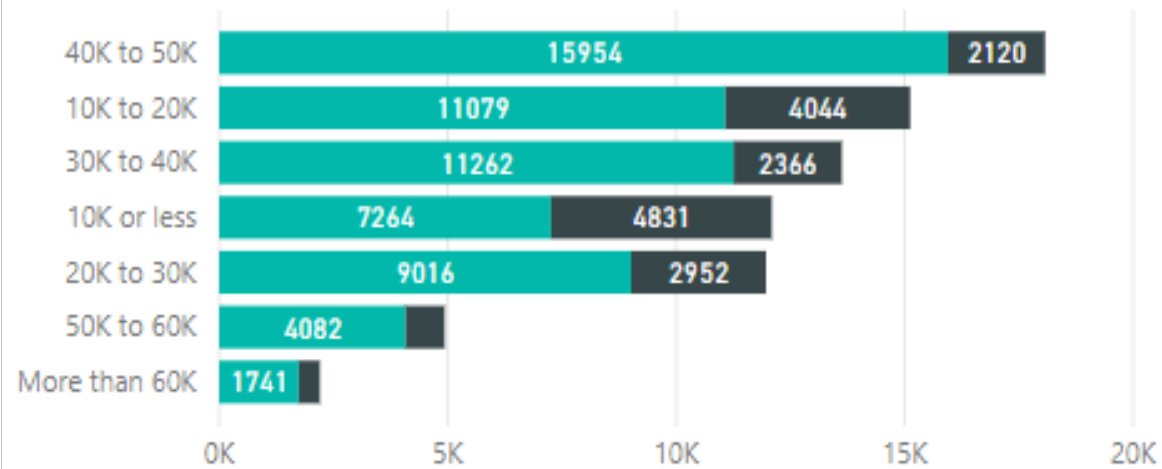
Sales Pipeline Conversion at a SaaS Startup

Variable under consideration: Opportunity Sizing

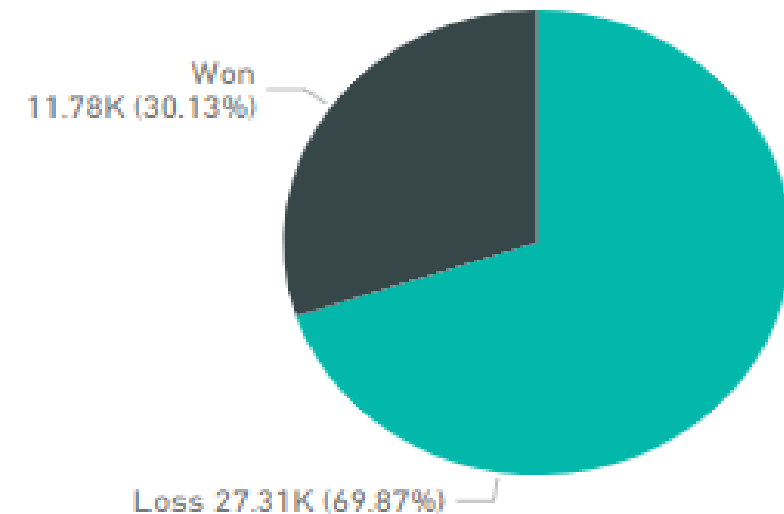
The opportunity conversion rate is significantly higher in 0-30K range.

Count of Opportunity ID by Opportunity Sizing and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III A : Generating Insights

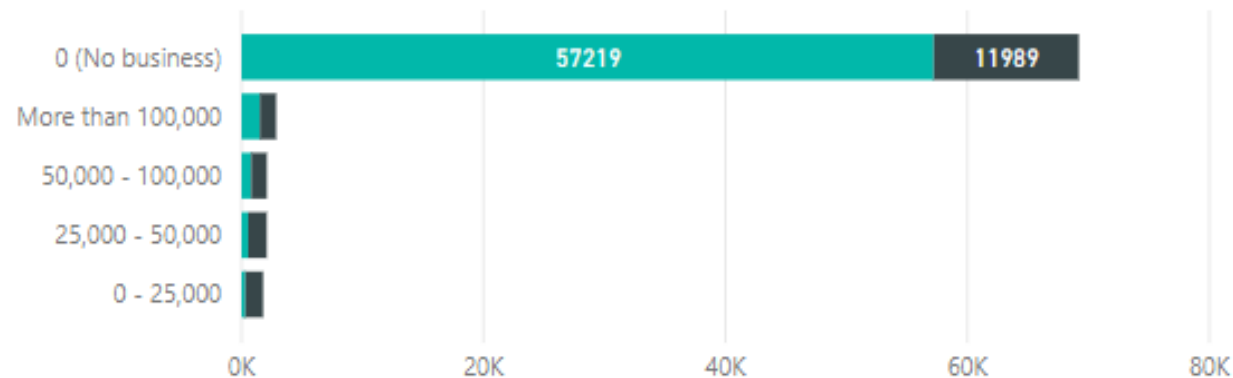
Sales Pipeline Conversion at a SaaS Startup

Variable under consideration: Business from Client last year

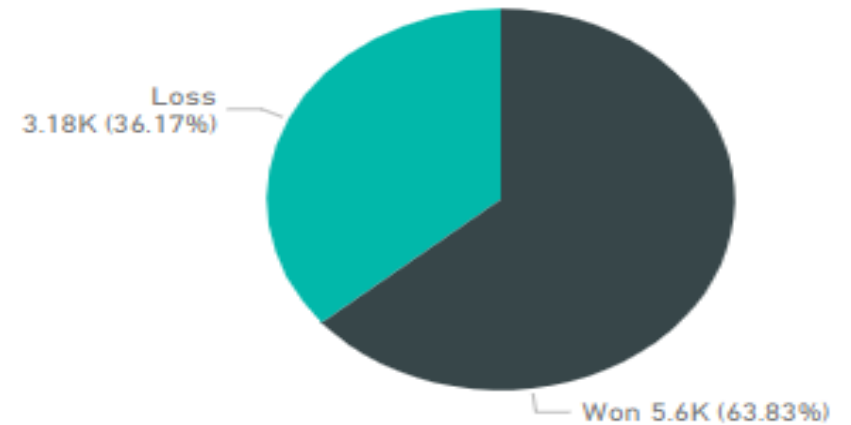
The conversion rate is higher for existing customers despite the number of opportunities unusually large from newer customers

Count of Opportunity ID by Business from Client Last Year and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Recommendations

Focus on the following categories for newer leads for ensuring high conversion rate

- ERP Implementation as the type of solution offered to the customers
- Enterprise Sellers as the B2B Sales Medium
- Client Revenue Sizing(100K or less)
- Opportunity Sizing (0-30K)
- Existing Customers

Corresponding Insights

- An unusually large number of opportunities come from ERP Implementation category and they have a better than average opportunity conversion rate
- Most Opportunities are from Marketing and Enterprise Sellers with the Enterprise Sellers having a better than average opportunity conversion rate.
- An unusually large number of opportunities come from clients who are less in revenue size(100K or less)
- The opportunity conversion rate is significantly higher for clients with potential revenue in 0-30K range.
- The conversion rate is higher for existing customers despite the number of opportunities unusually large from newer customers

PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

Final Recommendations

Focus on the following categories for newer leads for ensuring high conversion rate

- ERP Implementation category of solution offered to the customers
- Enterprise Sellers as the B2B Sales Medium
- Client Revenue Sizing(100K or less)
- Opportunity Sizing (0-30K)
- Existing Customers

PART III B : Presenting Findings

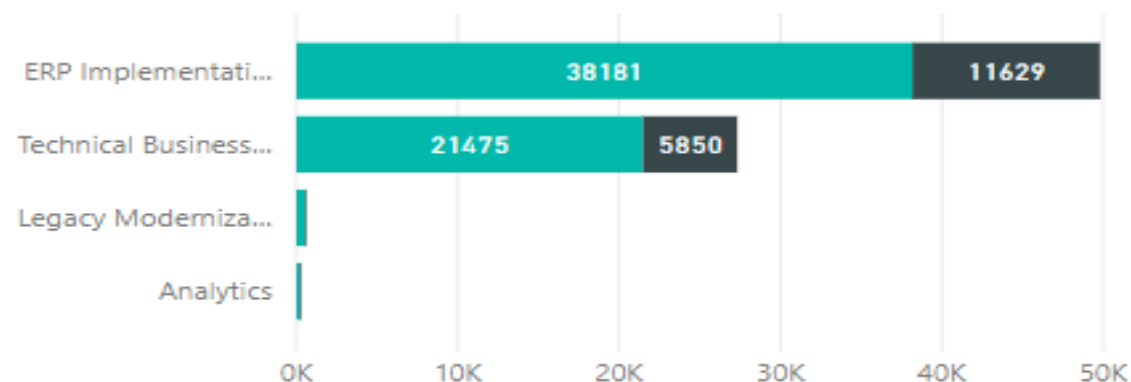
Sales Pipeline Conversion at a SaaS Startup

Focus on ERP Implementation category of solutions

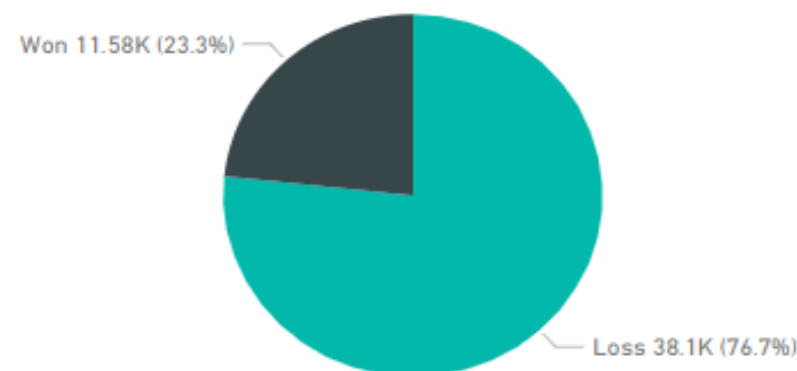
An unusually large number of opportunities come from ERP Implementation category and they have a better than average opportunity conversion rate

Count of Opportunity ID by Technology Primary and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III B : Presenting Findings

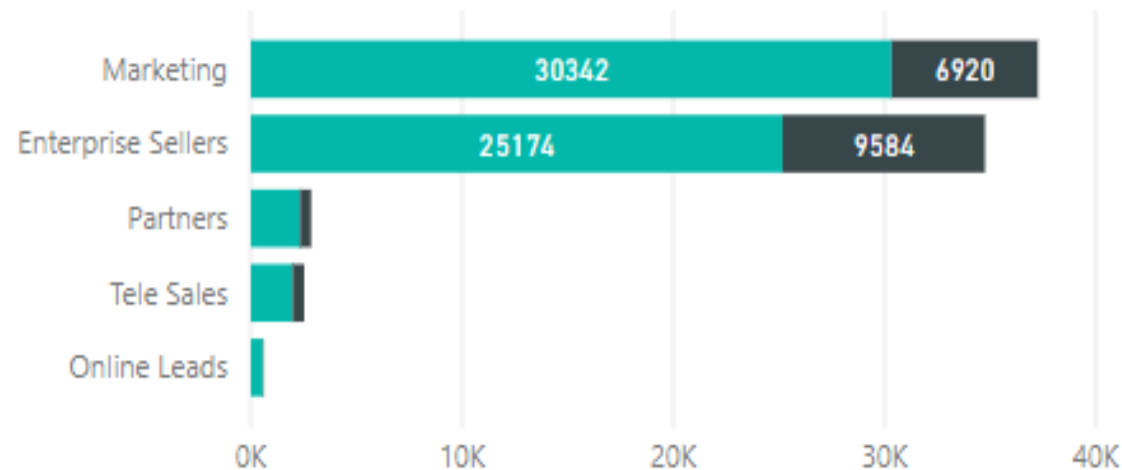
Sales Pipeline Conversion at a SaaS Startup

Focus on Enterprise Sellers channel as the B2B sales medium

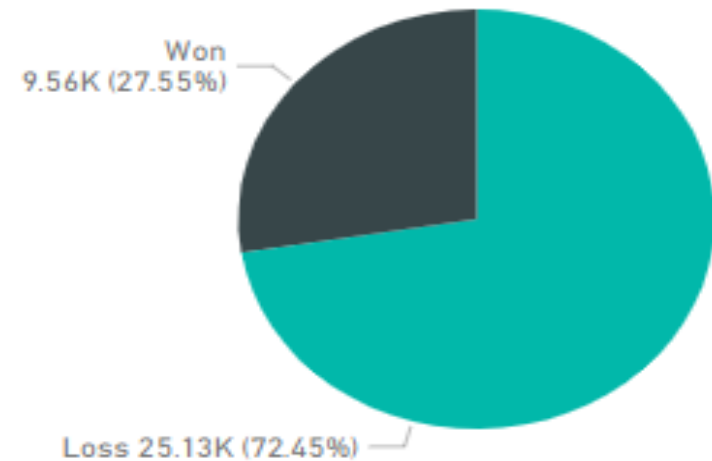
Most Opportunities are from Marketing and Enterprise Sellers with the Enterprise Sellers having a better than average opportunity conversion rate.

Count of Opportunity ID by B2B Sales Medium and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III B : Presenting Findings

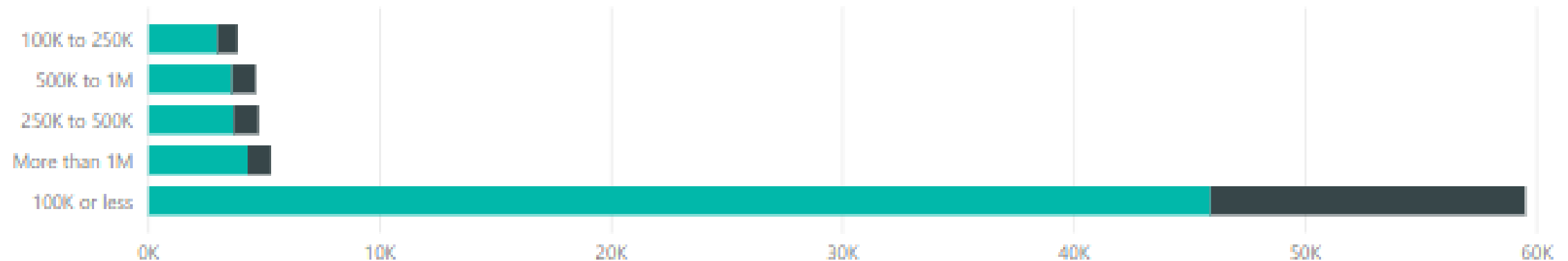
Sales Pipeline Conversion at a SaaS Startup

Focus on clients who have a revenue size(100K or less)

An unusually large number of opportunities come from clients who are less in revenue size(100K or less)

Count of Opportunity ID by Client Revenue Sizing and Opportunity Status

Opportunity Status ● Loss ● Won



PART III B : Presenting Findings

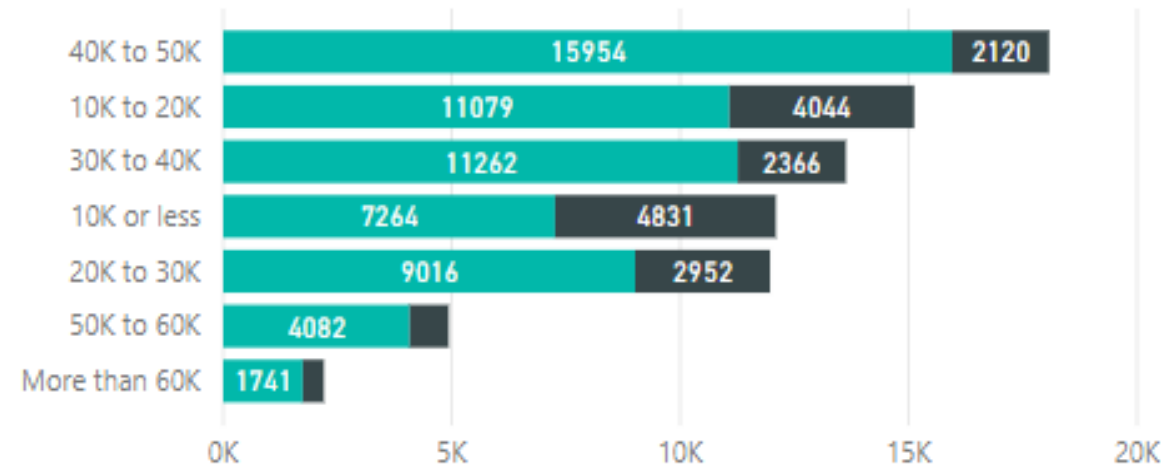
Sales Pipeline Conversion at a SaaS Startup

Focus on clients where the revenue generated is between 0-30K range.

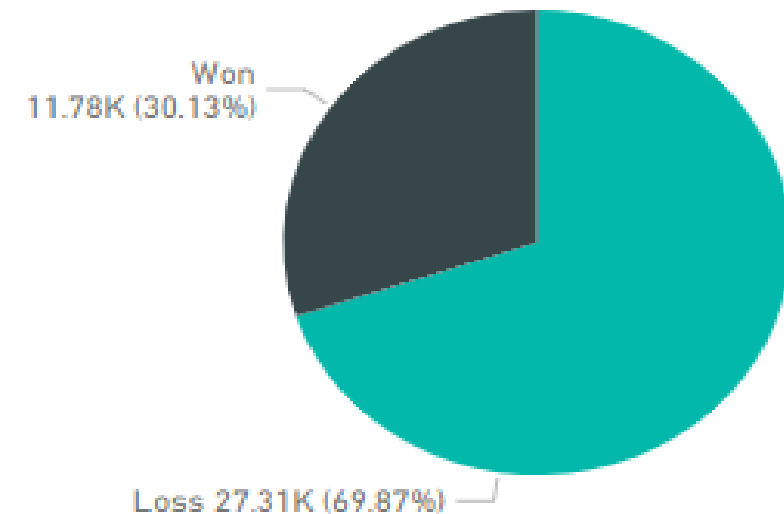
The opportunity conversion rate is significantly higher in 0-30K range.

Count of Opportunity ID by Opportunity Sizing and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status



PART III B : Presenting Findings

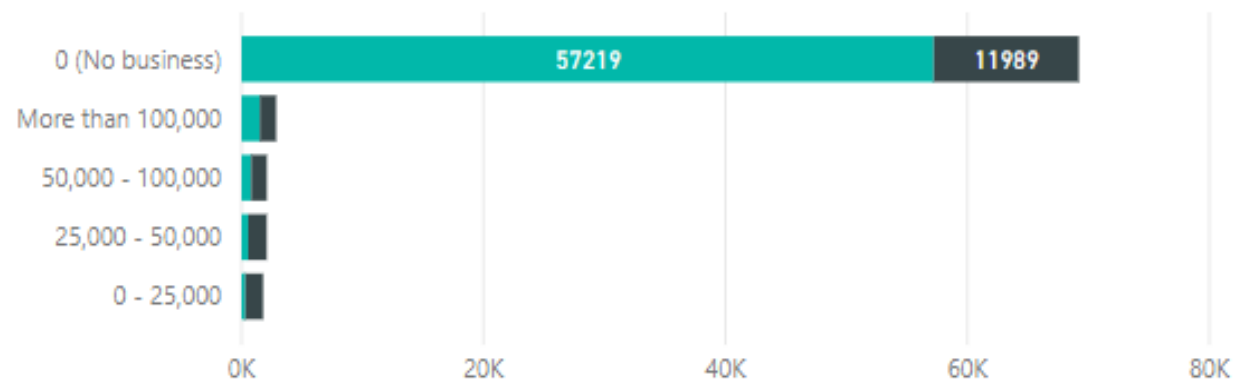
Sales Pipeline Conversion at a SaaS Startup

Focus on Clients who are already existing customers

The conversion rate is higher for existing customers despite the number of opportunities unusually large from newer customers

Count of Opportunity ID by Business from Client Last Year and Opportunity Status

Opportunity Status ● Loss ● Won



Count of Opportunity ID by Opportunity Status

