



Case Study: Sales Operations

Overview:

- You are guiding a team of 10 customer success associates, who are responsible for Zenyum's overall sales. The process involves first booking an appointment with one of our partner clinics and subsequently converting them into sales. Please review the sample data attached and answer the questions that follow. For the sake of the assignment, you can make any assumptions that you want, and can specify them if you think that will support your assessment.

Sample data:

- Attached in the email.

Questions to answer:

- Can you simplify the data in a format that can generate insights? (Please reach out with specific points if you'd need help with this to help answer this and other questions.) Please organize data across the funnel from lead generation to closed won/ lost (the funnel flows as follows: lead to opp, opp qualified (suitable for Zenyum), appointment booked (with clinic for scans), in treatment planning (treatment plan being generated), magic call (share treatment plan and close won customer by closing the sale). Leverage as much of the data as possible to generate insights on channel efficiency, conversion rates, productivity, performance and overall funnel flow.
- Please analyze business level trends, and performance efficiency indicators for the period given.
- What additional metrics would you need to look at to assess the team's performance?
- If in the next month, you wish to grow sales by 20% over the last month - what will be required? Assume there are no constraints on asks.
- How would you approach the role of Sales ops manager which is tasked with driving team performance through coaching and influence but not directly managing them, while still maintaining line of sight to company objectives and goals and deploying them in an actionable and executable way?