

Hello Team,

Objective -

1. Increase Qualification %

Suggestions for action -

1. LQT - Cater to leads within 2 hours (or ASAP)
2. LQT - Reduce Task violations
3. LQT - Reduce Follow-up violations (Day 1, 2, 3, 5, 7) (calculated using notes)
4. LQT - Increase operating hours and days via LQT roster
5. Marketing - Align marketing mix with Q%

Data Insights -

1. LQT - Time to 1st Note vs Q% (Mar 23 to Feb 24)
 - a. Q% is 17% for leads with Time to 1st Note less than 2 hours
 - b. Q% is 9% for leads with Time to 1st Note between 24 & 48 hours
2. LQT - Time to 1st Note vs Q% (Dec 23 - Feb 24)
 - a. Q% is 21% for leads with Time to 1st Note less than 2 hours
 - b. Q% is 9% for leads with Time to 1st Note between 24 & 48 hours
3. LQT - Task Violations vs Q% (Mar 23 - Nov 23)
 - a. Q% is 15% for leads with Violated Tasks 0%
 - b. Q% is 8% for leads with Violated Tasks > 20%
 - c. 46% leads have >0 Tasks Violation
4. LQT - Task Violations vs Q% (Dec 23 - Feb 24)
 - a. Q% is 18% for leads with Violated Tasks 0%
 - b. Q% is 13% for leads with Violated Tasks > 20%
 - c. 44% leads have Tasks Violation >0%
5. LQT - Follow-up violations vs Q% (Mar 23 - Nov 23) {{{calculated using notes}}}
 - a. Q% is 16% for leads with =0 Follow-up Violations
 - b. Q% is 3% for leads with >0 Follow-up Violations
 - c. 34% leads have Follow-up Violations
6. LQT - Follow-up violations vs Q% (Dec 23 - Feb 24)
 - a. Q% is 21% for leads with =0 Follow-up Violations
 - b. Q% is 6% for leads with >0 Follow-up Violations
 - c. 36% leads have Follow-up Violations
7. LQT - Active Agent vs Time to 1st Note (Dec 23 - Feb 24) as % of Agent Leads
 - a. New Agents have bad Time to 1st Note (Kartik Sawant, Saurab Rao, Swati Maurya, Viraj Gada)
8. LQT - Active Agent vs Time to 1st Note (Dec 23 - Feb 24) as count of Agent Leads
 - a. New Agents have bad Time to 1st Note (Kartik Sawant, Saurab Rao, Swati Maurya, Viraj Gada)

9. LQT - Active Agent vs Q% vs Time to 1st Note Leads (Dec 23 - Feb 24)
 - a. Experienced Agents have higher Q% (Hardik > Harsh = Sara = Shreeya > Dalian > Others)
10. Marketing - UTM Source-Medium (Top 11 by volume) vs Q% (Time to 1st Note ALL buckets) (Dec 23 - Feb 24)
 - a. Q% is highest for (Referral 88% > BD 40% > MoEngage Whatsapp 23% = Influencer Ishaan 23% > Others 15%)
11. Marketing - UTM Source-Medium (Top 11 by volume) vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)
 - a. Q% is highest for (Referral 89% > BD 38% > UniCreds Auto-forward 34% > Others 18%)
12. Marketing - UTM Campaign Sub-Category vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)
 - a. Q% is highest for (Competitors 33% > Brand 29% > Others 11%)
13. Marketing - UTM Campaign Destination Country vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)
 - a. Q% is highest for Ireland 19%
14. Marketing - UTM Campaign Source Location vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)
 - a. Q% is lowest for Chennai Wan 11% = Delhi Wan 11% < Bangalore Wan 12% < Hyderabad Wan 13% = Chennai 13% < Others 16%
 - b. (Wan = nearby geographical area)
15. Time Series - Lead Created Month vs Q% (Mar 23 - Feb 24)
 - a. Q% is highest when Lead Volume is low (Jan 2024 18.8% > July 2023 14.9% > December 2023 14.7% > June 2023 14.2% > Others 11.9%)
16. Time Series - Lead Created Day of Week vs Q%
 - a. Q% is lowest for Leads Created on Sunday 10.5% < Saturday 11.4% < Others 13.2%
 - b. Avg Days to 1st Note is higher for Sunday 1.57 > Saturday 1.45 > Others 0.82
17. Time Series - Lead Created Hour of Day vs Q%
 - a. Q% is high for Leads Created {{9 AM to 6 PM 13.7%}} > {{6 PM to 5 AM 11.3%}} > {{5 AM to 9 AM 9.47%}}
 - b. It is possible that leads created from 9 PM to 5 AM have untapped potential for higher Q%
 - i. Because, 5 AM to 9 AM leads have lower Q% - while both are catered with delay on next working day

Detailed Data -

1. LQT - Time to 1st Note vs Q% (Mar 23 to Feb 24)

Time to 1st Note	Leads	% Distribution	Qualified Leads	Qualified %
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1. No Notes	11621	8%	502	4%
2. Less than 2 hours	60230	40%	9942	17%
3. 2 hours to 6 hours	10352	7%	1389	13%
4. 6 hours to 24 hours	39073	26%	4660	12%
5. 24 hours to 48 hours	14912	10%	1438	10%
6. 48 hours to 72 hours	6155	4%	542	9%
7. More than 72 hours	7149	5%	762	11%
Grand Total	149492	100%	19235	13%

2. LQT - Time to 1st Note vs Q% (Dec 23 - Feb 24)

Time to 1st Note	Leads	% Distribution	Qualified Leads	Qualified %
1. No Notes	3854	10%	156	4%
2. Less than 2 hours	15303	40%	3239	21%
3. 2 hours to 6 hours	2742	7%	448	16%
4. 6 hours to 24 hours	10230	27%	1411	14%
5. 24 hours to 48 hours	3868	10%	389	10%
6. 48 hours to 72 hours	1544	4%	142	9%
7. More than 72 hours	1037	3%	229	22%
Grand Total	38578	100%	6014	16%

3. LQT - Task Violations vs Q% (Mar 23 - Nov 23)

Task Violations per lead	Lead Count	% Distribution	Qualified Leads	Q %	Sum of total_tasks
1. Zero task violation	55465	54%	8321	15%	32%
2. Less than 20% task violation	1533	1%	191	12%	4%
3. 20%-50% task violation	18594	18%	1532	8%	30%

4. Greater than 50%	27831	27%	2342	8%	34%
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4. LQT - Task Violations vs Q% (Dec 23 - Feb 24)

Task Violations per lead	Lead Count	% Distribution	Qualified Leads	Q %	Sum of total_tasks
1. Zero task violation	21710	56%	3924	18%	27%
2. Less than 20% task violation	931	2%	127	14%	7%
3. 20%-50% task violation	6806	18%	866	13%	32%
4. Greater than 50%	9131	24%	1097	12%	34%

5. LQT - Follow-up violations vs Q% (Mar 23 - Nov 23) {{{calculated using notes}}}

Follow-up violation	Leads	% Distribution	Qualified Leads	Q %
No Violation	68200	66%	11179	16%
Violation	35223	34%	1207	3%

6. LQT - Follow-up violations vs Q% (Dec 23 - Feb 24)

Follow-up violation	Leads	% Distribution	Qualified Leads	Q %
0	24594	64%	5117	21%
1	13984	36%	897	6%

7. LQT - Active Agent vs Time to 1st Note (Dec 23 - Feb 24) as % of Agent Leads

Agents	1. No Notes	2. Less than 2 hours	3. Less than 6 hours	4. Less than 24 hours	5. Less than 48 hours	6. Less than 72 hours	7. More than 72 hours	Grand Total
Dalian Pereira	1%	50%	9%	26%	10%	3%	1%	100%

Hardik Kamdar	1%	50%	9%	28%	7%	4%	2%	100%
Harsh Sharma	2%	46%	8%	29%	9%	4%	2%	100%
Kabir Dhameja	2%	50%	8%	27%	7%	3%	2%	100%
Karan Chitalia	0%	47%	17%	30%	2%	4%	0%	100%
Kartik Sawant	12%	33%	9%	24%	6%	8%	8%	100%
Mufida Loladiya	0%	50%	10%	28%	8%	2%	1%	100%
Sara Solkar	1%	48%	9%	28%	10%	4%	1%	100%
Saurab Rao	0%	21%	17%	47%	13%	0%	2%	100%
Shania Aldons	0%	40%	12%	44%	4%	0%	0%	100%
Sharmishtha Chikhalkar	0%	48%	8%	30%	8%	4%	1%	100%
Shreeya Dalvi	0%	45%	8%	30%	11%	3%	3%	100%
Swati Maurya	25%	33%	8%	21%	8%	4%	1%	100%
Umme Ansari	2%	45%	7%	32%	10%	3%	0%	100%
Viraj Gada	2%	36%	8%	29%	9%	13%	2%	100%
Grand Total	1%	47%	9%	29%	9%	4%	2%	100%

8. LQT - Active Agent vs Time to 1st Note (Dec 23 - Feb 24) as count of Agent Leads

Agents	1. No Notes	2. Less than 2 hours	3. 2 hours to 6 hours	4. 6 hours to 24 hours	5. 24 hours to 48 hours	6. 48 hours to 72 hours	7. More than 72 hours	Grand Total
Dalian Pereira	12	1031	183	538	213	67	22	2066
Hardik Kamdar	14	810	146	451	116	61	33	1631
Harsh Sharma	36	787	140	495	145	72	26	1701
Kabir Dhameja	33	744	114	411	112	50	33	1497
Karan Chitalia		48	17	31	2	4		102
Kartik Sawant	33	94	26	67	16	23	22	281
Mufida Loladiya	2	1027	197	576	170	48	18	2038
Sara Solkar	12	878	157	517	177	81	17	1839

Saurab Rao		10	8	22	6		1	47
Shania Aldons		32	10	36	3			81
Sharmishtha Chikhalkar	1	814	144	517	135	76	21	1708
Shreeya Dalvi	5	754	140	499	177	56	49	1680
Swati Maurya	56	75	18	48	18	10	2	227
Umme Ansari	26	635	105	457	137	41	7	1408
Viraj Gada	7	109	25	89	28	38	6	302
Grand Total	237	7848	1430	4754	1455	627	257	16608

9. LQT - Active Agent vs Q% vs Time to 1st Note Leads (Dec 23 - Feb 24)

Agents	Total Leads	Qualified Leads	Q %	Less than 1 Day	Less than 6 hours
Dalian Pereira	2066	308	15%	85%	59%
Hardik Kamdar	1631	354	22%	86%	59%
Harsh Sharma	1701	286	17%	84%	54%
Kabir Dhameja	1497	238	16%	85%	57%
Karan Chitalia	102	4	4%	94%	64%
Kartik Sawant	281	35	12%	67%	43%
Mufida Loladiya	2038	261	13%	88%	60%
Sara Solkar	1839	308	17%	84%	56%
Saurab Rao	47	4	9%	85%	38%
Shania Aldons	81	4	5%	96%	52%
Sharmishtha Chikhalkar	1708	235	14%	86%	56%
Shreeya Dalvi	1680	289	17%	83%	53%
Swati Maurya	227	23	10%	62%	41%
Umme Ansari	1408	179	13%	85%	53%
Viraj Gada	302	34	11%	74%	44%
Grand Total	16608	2562	15%	84%	56%

10. Marketing - UTM Source-Medium (Top 11 by volume) vs Q% (Time to 1st Note ALL buckets) (Dec 23 - Feb 24)

UTM Source-Medium combo	Total Leads	Qualified Leads	Q %
google-cpc	29195	3966	14%
unicreds-auto-forward	5553	1062	19%
bing-cpc	960	166	17%
business-development-crm	639	258	40%
affiliate-just-dial	412	15	4%
moengage-whatsapp	379	86	23%
google-organic	236	46	19%
(blank)	207	22	11%
Referral-crm	206	181	88%
inf-ishaan-arora	163	37	23%
us-blog-organic	156	23	15%

11. Marketing - UTM Source-Medium (Top 11 by volume) vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)

UTM Source-Medium combo	Total Leads	Qualified Leads	Q %
google-cpc	22842	3437	15%
unicreds-auto-forward	2410	819	34%
bing-cpc	741	155	21%
business-development-crm	433	165	38%
affiliate-just-dial	346	11	3%
moengage-whatsapp	333	83	25%
Referral-crm	193	172	89%

google-organic	187	44	24%
(blank)	161	17	11%
inf-ishaan-arora	130	32	25%
us-blog-organic	122	19	16%

12. Marketing - UTM Campaign Sub-Category vs Q% (Time to 1st Note Less than 24 hours)
(Dec 23 - Feb 24)

UTM Campaign Sub-Category	Total Leads	Qualified Leads	Q %
Core	9920	1450	15%
Masters	4505	755	17%
Course	3626	507	14%
City	1182	144	12%
University	949	167	18%
Remarketing	435	33	8%
Brand	392	112	29%
Masters Courses	250	28	11%
Competitors	211	69	33%
Branding	141	9	6%
Instream	103	10	10%
Perf-Max	33	1	3%
Generic	30	2	7%
YouTube	12	0	0%

13. Marketing - UTM Campaign Destination Country vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)

UTM Campaign Destination Country	Total Leads	Qualified Leads	Q %
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UK	10891	1629	15%
(blank)	6486	1811	28%
USA	4944	763	15%
All	2273	320	14%
NZ	1163	192	17%
Ireland	1137	216	19%
Canada	758	76	10%
Australia	623	91	15%

14. Marketing - UTM Campaign location vs Q% (Time to 1st Note Less than 24 hours) (Dec 23 - Feb 24)

UTM Campaign Source Location	Total Leads	Qualified Leads	Q %
(blank)	6486	1811	28%
Hyderabad	4316	718	17%
Mumbai-Wan	3796	561	15%
Hyderabad-Wan	2758	372	13%
India	2511	435	17%
Mumbai	1802	296	16%
Delhi	1763	263	15%
Bangalore	1551	249	16%
Delhi-Wan	1213	133	11%
Bangalore-Wan	1039	127	12%
Chennai	746	100	13%

Chennai-Wan	294	33	11%
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15. Time Series - Lead Created Month vs Q% (Mar 23 - Feb 24)

<i>year_month</i>	Leads	QL count	Median Tasks	Median Notes	Median Days to 1st Note	Average Days to 1st Note	Q %
2023-03	12284	1464	2	2	2	2.30	11.92%
2023-04	14006	1410	2	3	1	2.04	10.07%
2023-05	16178	1843	2	3	1	0.78	11.39%
2023-06	7975	1132	3	3	0	0.68	14.19%
2023-07	8587	1281	3	4	0	0.57	14.92%
2023-08	12133	1523	4	4	0	0.58	12.55%
2023-09	11808	1465	4	4	0	0.57	12.41%
2023-10	12181	1292	4	5	0	0.69	10.61%
2023-11	7321	842	3	4	1	0.90	11.50%
2023-12	8035	1187	3	4	1	0.82	14.77%
2024-01	6440	1216	4	5	1	0.69	18.88%
2024-02	9307	1232	4	5	1	0.78	13.24%
2024-03	4710	608	1	1	1	0.66	12.91%
Grand Total	130965	16495	3	3	1	1.00	

16. Time Series - Lead Created Day of Week vs Q%

<i>Created Day of week</i>	Leads	QL count	Median Days to 1st Note	Average Days to 1st Note	Q %
1	17008	1789	1	1.57	10.52%
2	19958	2667	0	0.76	13.36%
3	19018	2461	0	0.69	12.94%
4	20208	2629	0	0.81	13.01%
5	18351	2435	0	0.91	13.27%
6	18861	2500	0	0.91	13.25%

7	17561	2014	2	1.45	11.47%
Grand Total	130965	16495	1	1.00	12.59%

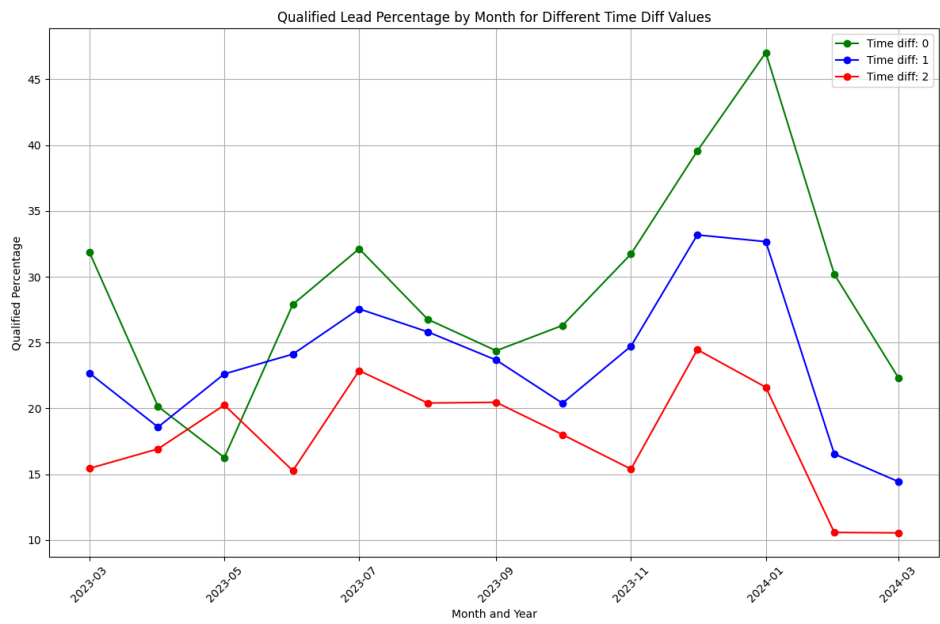
17. Time Series - Lead Created Hour of Day vs Q%

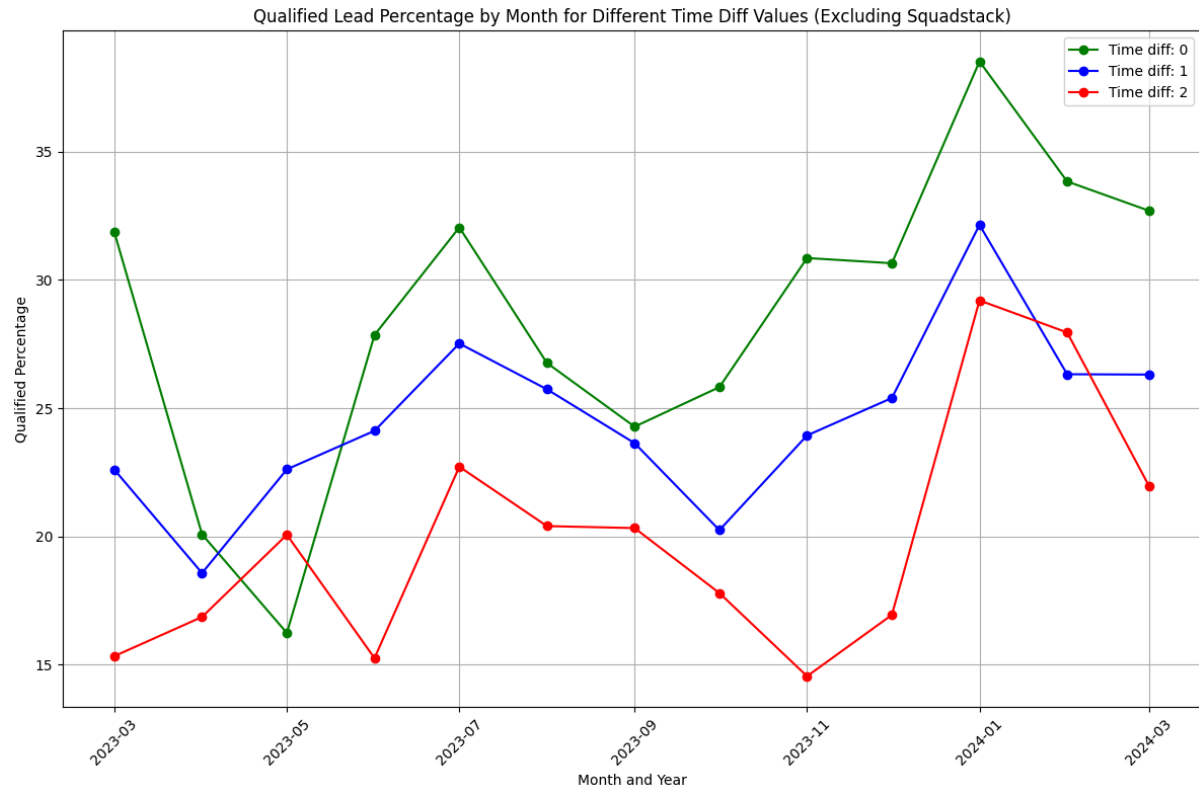
	Leads	Qualified	Q%
1. 9 AM - 6 PM	74050	10187	13.76%
2. 6 PM - 5 AM	48868	5546	11.35%
3. 5AM - 9 AM	8047	762	9.47%

<i>Created Hour of Day</i>	Leads	QL count	AVERAGE of notes_count	Median Notes	Median Days to 1st Note	Average Days to 1st Note	Q %	Batch
0	4857	567	3.46	4	1	1.51	11.67%	2. 6 PM - 5 AM
1	3192	382	3.44	4	1	1.52	11.97%	2. 6 PM - 5 AM
2	2032	238	3.48	4	1	1.51	11.71%	2. 6 PM - 5 AM
3	1235	162	3.62	4	1	1.44	13.12%	2. 6 PM - 5 AM
4	869	99	3.49	4	1	1.51	11.39%	2. 6 PM - 5 AM
5	853	85	3.33	3	1	0.98	9.96%	3. 5AM - 9 AM
6	1297	101	3.36	4	0	0.48	7.79%	3. 5AM - 9 AM
7	2335	227	3.39	3	0	0.48	9.72%	3. 5AM - 9 AM
8	3562	349	3.32	3	0	0.51	9.80%	3. 5AM - 9 AM
9	4676	534	3.37	3	0	0.57	11.42%	1. 9 AM - 6 PM
10	6615	796	3.43	3	0	0.56	12.03%	1. 9 AM - 6 PM
11	8081	1062	3.40	3	0	0.56	13.14%	1. 9 AM - 6 PM
12	8868	1249	3.39	3	0	0.54	14.08%	1. 9 AM - 6 PM
13	7954	1121	3.35	3	0	0.57	14.09%	1. 9 AM - 6 PM
14	7417	986	3.33	3	0	0.70	13.29%	1. 9 AM - 6 PM
15	7655	1104	3.28	3	0	0.75	14.42%	1. 9 AM - 6 PM
16	7718	1166	3.29	3	0	0.76	15.11%	1. 9 AM - 6 PM

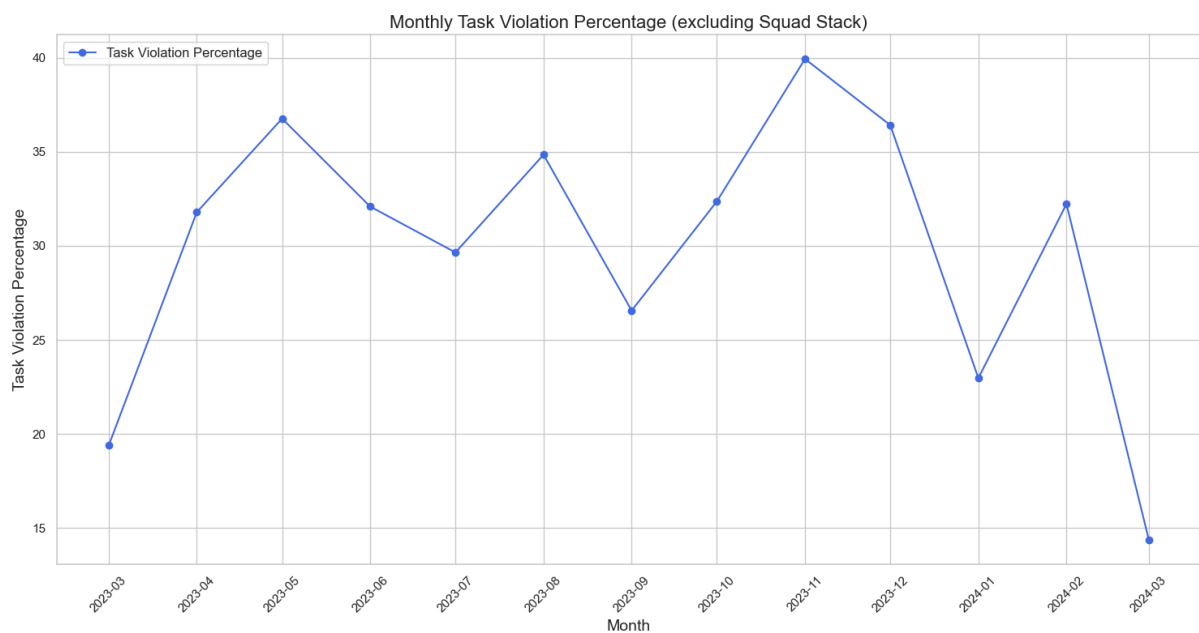
17	7653	1093	3.30	3	0	0.86	14.28%	1. 9 AM - 6 PM
18	7413	1076	3.34	3	1	0.94	14.52%	1. 9 AM - 6 PM
19	7619	915	3.39	3	1	1.30	12.01%	2. 6 PM - 5 AM
20	8254	942	3.34	3	1	1.73	11.41%	2. 6 PM - 5 AM
21	7385	818	3.38	3	1	1.62	11.08%	2. 6 PM - 5 AM
22	7017	743	3.38	3	1	1.56	10.59%	2. 6 PM - 5 AM
23	6408	680	3.40	3	1	1.57	10.61%	2. 6 PM - 5 AM
Grand Total	130965	16495	3.37	3	1	1.00	12.59%	

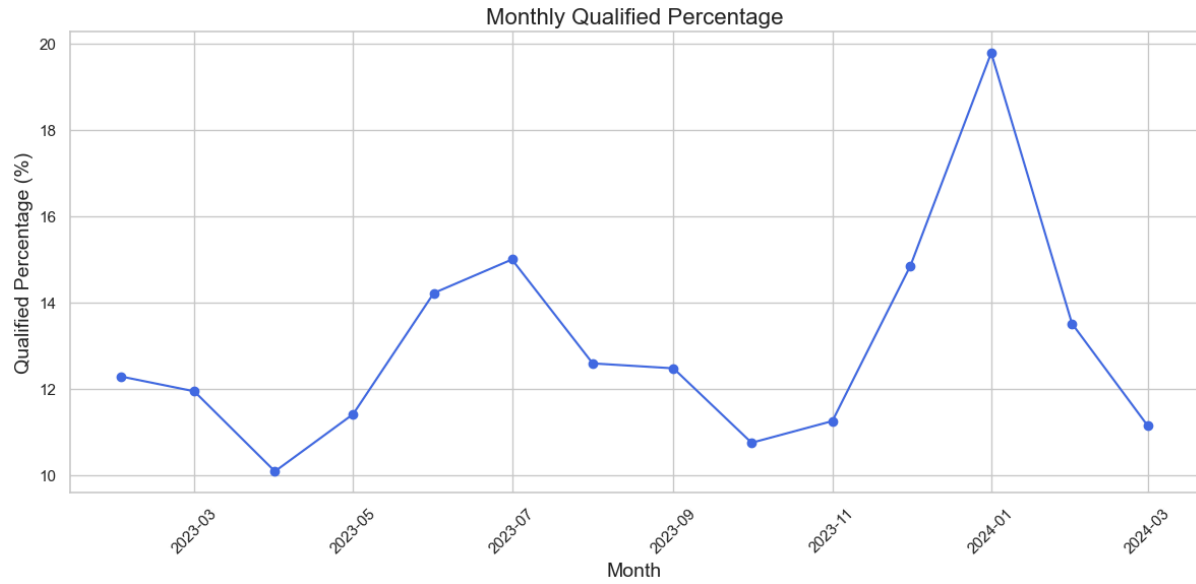
Other data -





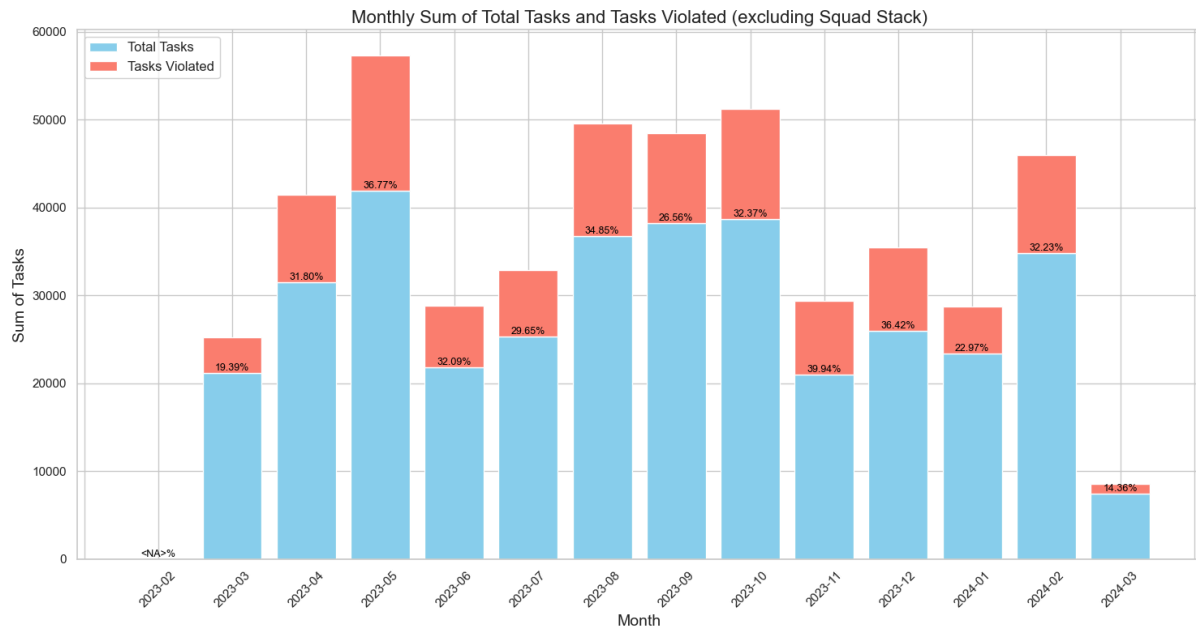
We have also done overall analysis on the task level considering what percentage of tasks are being violated by the agents and how it is affecting the qualification percentage.



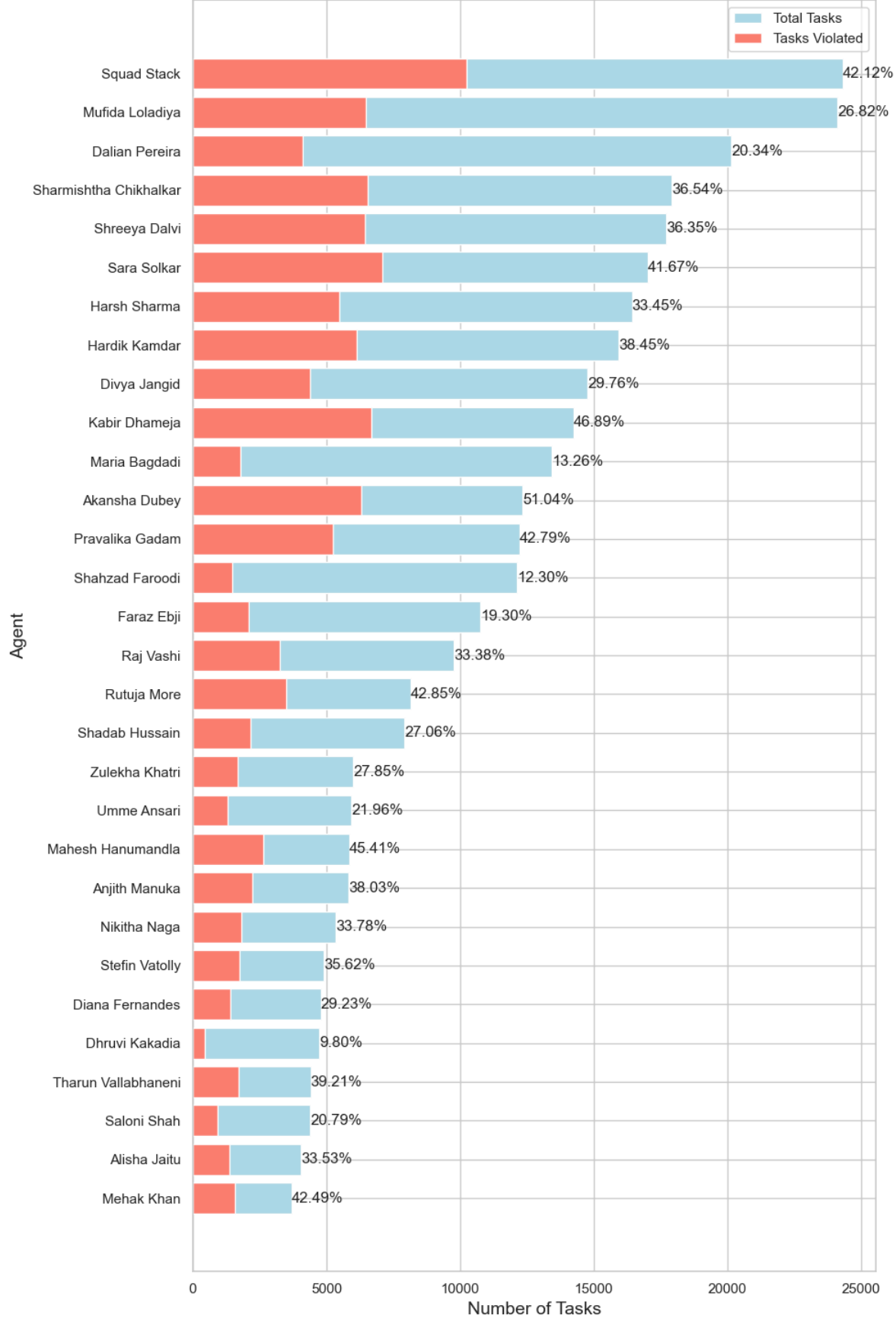


From above two graphs we can see that there is a clear inverse relationship between the task violation percentage and lead qualification percentage.

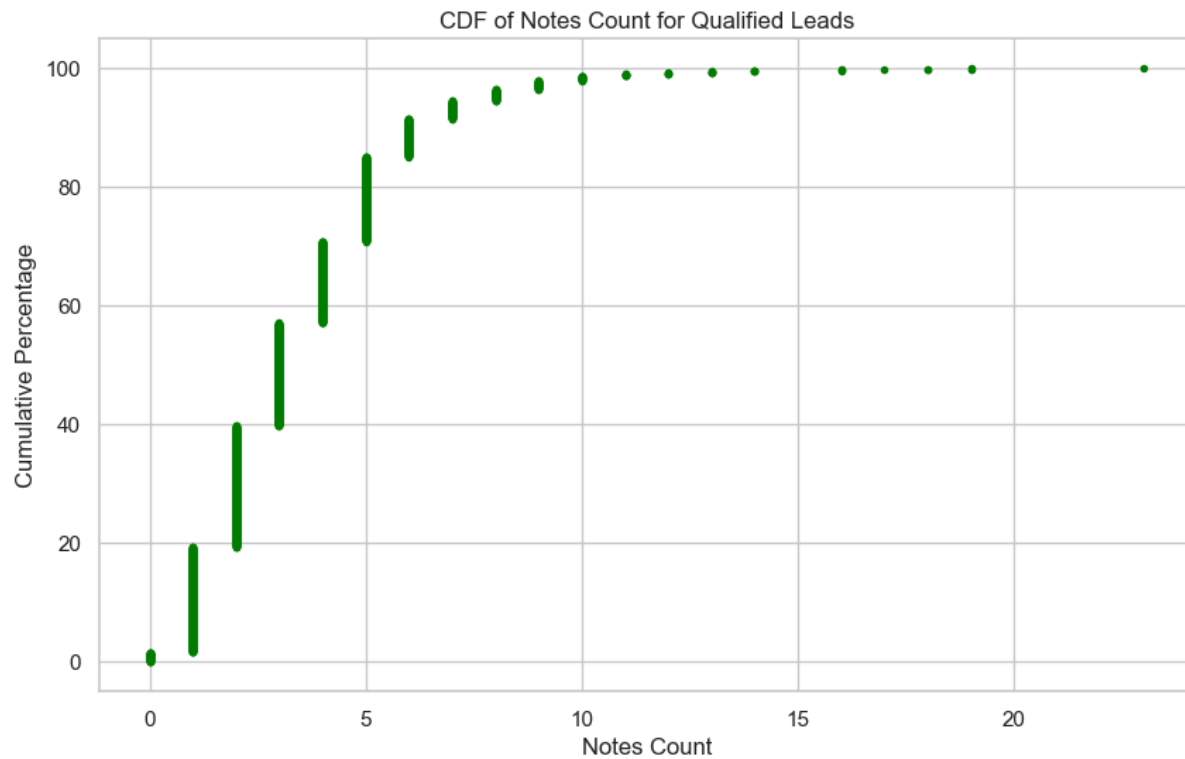
Please find below monthly violation graph and agent level graph as well for task violations



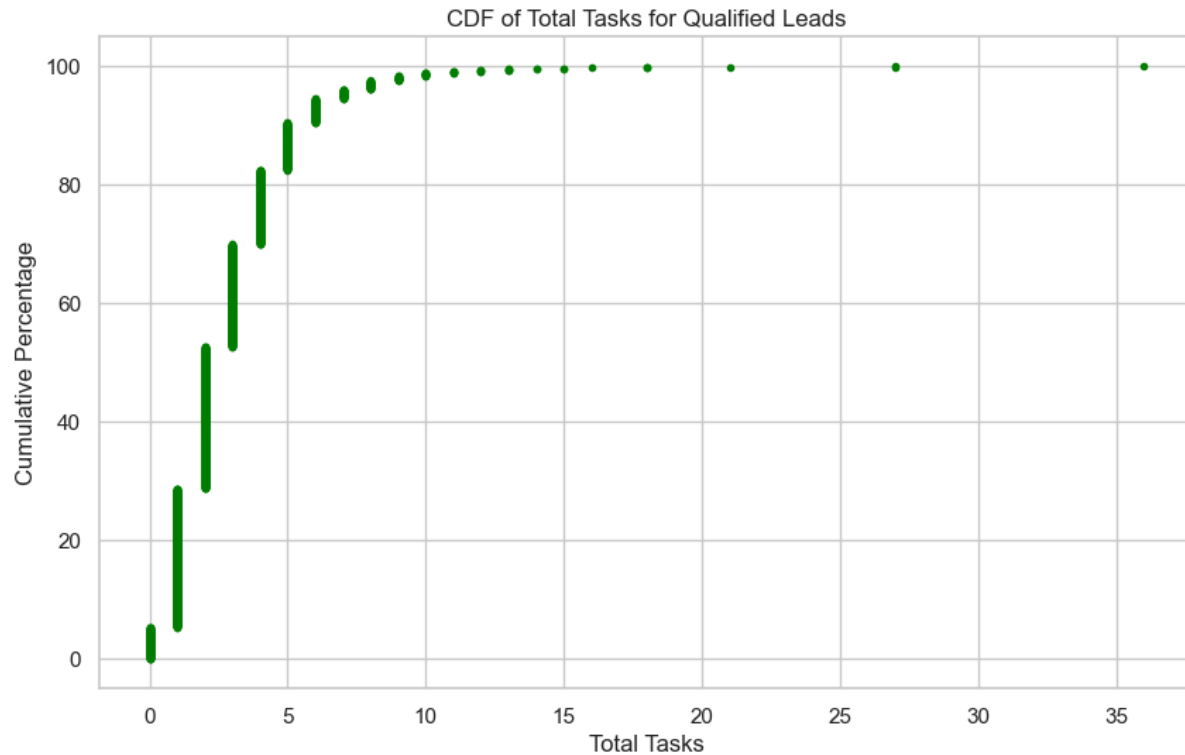
Agent-wise Total Tasks and Tasks Violated (>3000 Tasks) with Violation Percentage



Results of cumulative distribution analysis also show that Almost 80% of the qualified leads have >3 notes and >2 tasks during time_diff_in_days



This means almost 80% of the qualified leads have notes count greater than 3



This means almost 80% of the leads had task count greater than 2

Action Items for the LQT Team

1. Make sure the lead is getting catered on the same day. This would increase the qualification on average by 5% which could impact the annual revenue significantly.\
2. Keep task violations under 20%.

Total Annual Leads = 1,49,499

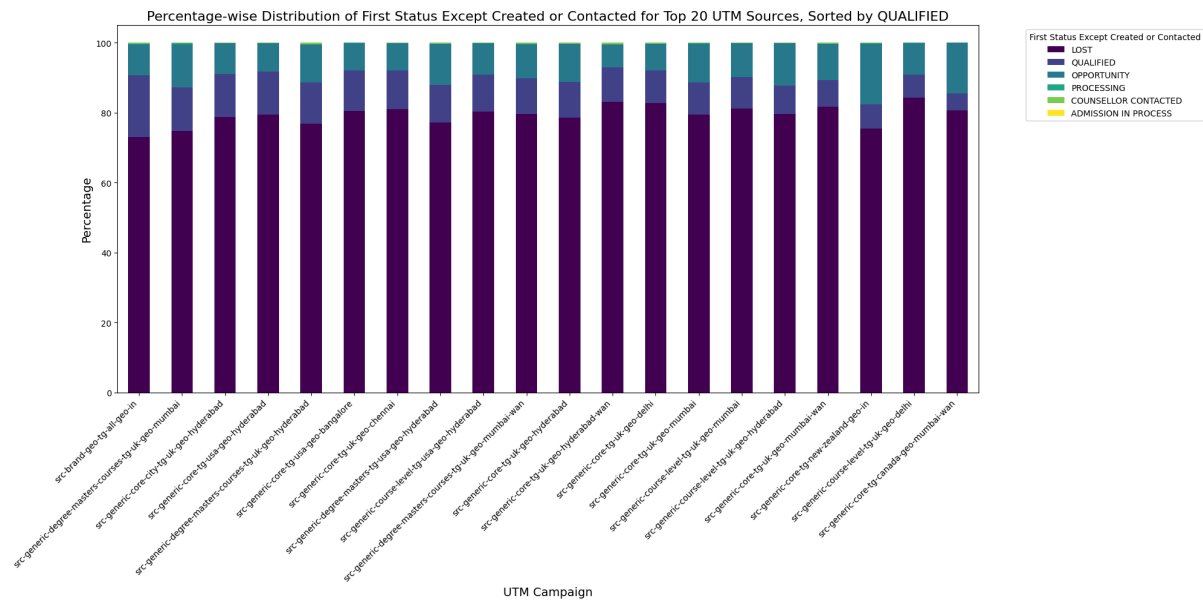
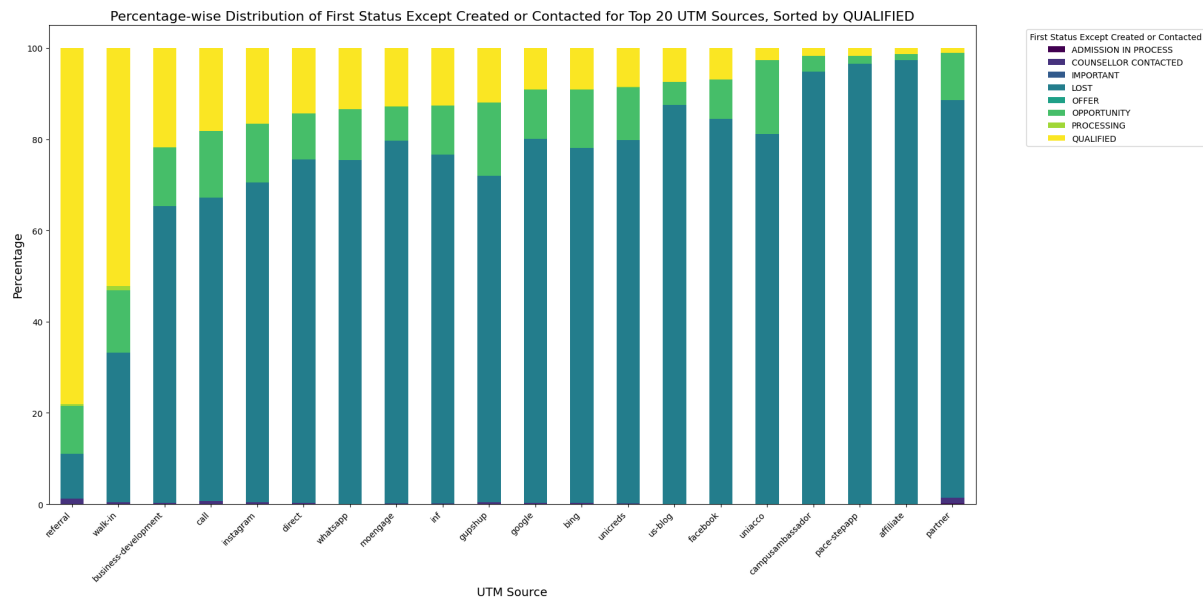
Current Qualification % = 12.86% (19235/149499)

After improvement

- Qualification Percentage Increase = 5%
- Extra Qualified Leads = 7474
- Potential Increase in Annual Revenue = $7474 \times 0.03 \times 2.3 \text{ Lakhs} \sim \mathbf{5.8 \text{ Cr}}$

Source of the Leads

UTM Source Wise Distribution {{top performers for Q% - referral, walk-in and business-development}}



Qualification Score Buckets

- 1. LQT - Time to 1st Note vs Q% (Dec 23 - Feb 24)

