DT Fellowship Simulation Assignment

Growth by Data: Orchestrating Funnels, Reducing CAC

Candidate Role: Data Champion
Date: 03-Dec-2025

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1. Problem Statement

- Hundreds of leads coming in, but no system to identify good leads.

- Most leads fall through the cracks; follow-ups are inconsistent.

- Rising CAC and erratic closures frustrate the founder.

- Sales and marketing work hard but don't speak the same language.

- Existing CRM is just a contact dump; no funnel or insights.

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2. My Role

- Build order in chaos: set up a CRM, define funnel logic, nurture leads effectively.

- Reduce CAC and improve conversions.

- Help business identify who to chase and who to disqualify.

- Make marketing and sales speak the same language.

- Create visibility for the founder into what's working.

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3. Funnel Design Simulation

Stage	Definition	Criteria to Upgrade	Department Owner
Lead	New contact acquired	First engagement	Marketing
MQL	Marketing-qualified	Downloads resource / signs up for webinar	Marketing
SQL	Sales-qualified	Verified by Sales	Sales
Customer / Won	Paid customer	Deal closed	Sales / CS
Engaged (Optional)	Actively interacting	Multiple engagements	Marketing

Visual: Funnel diagram (Lead → MQL → SQL → Won)

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4. CRM Configuration Blueprint

Core Data Fields: Lead Name, Lead Source, Industry, Stage, Intent, Last Engagement Date, Converted, Deal Value, Cost Incurred.

Automations: Auto-tagging, lifecycle stage updates, follow-up reminders, lead scoring.

Dashboard Views:

- Sales Reps → Leads by Stage, Upcoming Follow-ups
- Growth Manager → Channel Performance, Funnel Drop-offs
- CEO → CAC, LTV, Conversion Metrics, Revenue Summary

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5. Nurturing Mechanism Design

Intent Level	Frequency & Channels	Content Type	Success Metric	AI Tools
High	2–3 follow-ups / week (Email, LinkedIn, WhatsApp)	Demo reminders, Offers	Demo booked, conversion	ChatGPT for personalized messages
Mid	1–2 emails/week	Case studies, webinar invites	Reply rate, re-engagement	Automated email personalization
Low	Monthly newsletter	Blog, founder note	Opens, clicks	AI-powered email recommendations

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6. Funnel Analytics & Visuals

Funnel Chart: Lead → MQL → SQL → Won

Leads by Channel (Bar Chart): Shows which channels bring the most leads.

Cost per Conversion (Column Chart): Highlights expensive channels.

Deal Value by Stage (Pie Chart): Revenue contribution per stage.

Drop-off Analysis: Identifies stages where leads are lost.

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7. CAC Optimization

Channel	Leads	Conversions	Conversion Rate	Cost per Conversion	Insight
Facebook Ads	3000	30	1%	₹3000	Underperforming, high cost
Email	1000	25	2.5%	₹400	Efficient, low-cost channel
LinkedIn DMs	500	10	2%	₹2500	Expensive, low volume

Recommendations:

- Optimize Facebook Ads targeting and retarget warm leads.
- Increase investment in Email campaigns (high ROI).
- Use nurturing campaigns to re-engage mid-intent leads.
- Track CAC:LTV ratio weekly.

8. Strategic Summary

- Funnels reduce waste and improve ROI.
- Balance system design with human unpredictability by monitoring metrics continuously.
- Data storytelling helps founder and teams make informed decisions quickly.
- AI is used to personalize outreach, but human judgment drives strategy.

9. Closing Note

- Implemented structured CRM and funnel system.
- Visual dashboards for real-time decision-making.
- Clear nurturing strategy for leads of all intent levels.
- Recommendations to reduce CAC and improve conversion.