

CRM Analytics Project Report

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ABSTRACT

This project addresses the critical challenge of managing and optimizing incoming leads for an MSME using CRM analytics to reduce customer acquisition cost (CAC) and improve conversion rates. The problem centers around high lead volumes, inconsistent follow-ups, and fragmented sales processes that cause significant revenue leakage. Our approach involves designing a structured CRM funnel (Lead → MQL → SQL → Won), implementing targeted lead nurturing strategies based on intent level, and generating insights through interactive dashboards using Power BI and Python. Key results indicate that certain channels, such as Email campaigns, are cost-efficient with high conversions, whereas others like Facebook Ads underperform and require optimization. The conclusion emphasizes that data-driven CRM processes, combined with personalized nurturing and analytical monitoring, significantly improve lead conversion, lower CAC, and provide actionable insights for strategic decision-making.

INTRODUCTION

The project focuses on enhancing lead management and reducing CAC for MSMEs operating in the B2B sector. With digital outreach channels increasing, businesses face challenges in identifying high-quality leads, nurturing them effectively, and converting them into paying customers. Our methodology includes designing a structured sales funnel, implementing CRM automation, and generating insights through interactive dashboards. The purpose of this document is to outline a comprehensive CRM analytics approach that standardizes marketing and sales processes, provides visibility into lead performance, and improves ROI. The scope encompasses lead collection, funnel analysis, automated nurturing, channel performance assessment, and CAC optimization.

Working:

1. Lead Acquisition (Facebook Ads, Email, LinkedIn)
2. Data Entry into CRM → Lead Tagging & Classification by Intent
3. Funnel Processing → Stage Transitions (Lead → MQL → SQL → Won)
4. Nurturing Mechanism → High, Mid, Low Intent Lead Strategies
5. Analytics & Reporting → Funnel Metrics, Conversion Rates, Cost per Conversion
6. Recommendations & Optimization → Adjust Marketing Spend, Reduce CAC

BACKGROUND STUDY

Current CRM systems such as HubSpot, Zoho, and Notion provide basic contact management and pipeline tracking but lack advanced features for structured funnel stages, automated lead nurturing, and comprehensive CAC analytics. Studies indicate that unstructured CRM usage leads to inefficiencies, low conversion rates, and higher costs. Advanced CRM analytics solutions emphasize lead scoring, automated follow-ups, and performance dashboards to maximize ROI. Literature on funnel optimization, multi-channel lead performance analysis, and targeted nurturing has informed the methodology for this project, providing best practices for reducing CAC and improving conversion.

OBJECTIVES

- Design a structured CRM funnel that clearly defines Lead, MQL, SQL, and Won stages.
- Implement targeted nurturing strategies for high, mid, and low-intent leads.
- Develop interactive dashboards for visualizing funnel metrics, channel performance, and conversion rates.
- Identify underperforming channels and propose actionable optimization strategies.
- Reduce CAC while maximizing revenue from high-quality leads.
- Provide the MSME with a scalable and data-driven CRM system.

TECHNOLOGIES REQUIRED

- **Power BI:** For interactive dashboards, visual analytics, and decision support.
- **Python (Pandas, Plotly, Matplotlib, Numpy):** Data processing, visualization, and analysis.
- **Excel / CSV:** Data storage, preprocessing, and manipulation.
- **CRM Platforms (Notion / Zoho):** Lead management, automation, and funnel tracking.
- **AI Tools (ChatGPT):** Personalizing nurturing messages and automating follow-ups.

PROPOSED WORKFLOW:

1. **Lead Collection:** Gather leads from multiple channels (Facebook Ads, Email Campaigns, LinkedIn DMs).
2. **Funnel Design:** Define stages with clear criteria and ownership (Lead → MQL → SQL → Won, optional Engaged stage).
3. **CRM Configuration:** Set up core data fields, lifecycle automations, and dashboard views for Sales, Growth Managers, and CEOs.
4. **Lead Nurturing:** Implement strategies tailored to high, mid, and low-intent leads, including frequency, content type, and channels.
5. **Analytics:** Calculate conversion rates, cost per conversion, stage drop-offs, and deal value distribution. Visualize through funnel, bar, pie, and waterfall charts.
6. **Optimization:** Analyze underperforming channels and implement experiments to reduce CAC and increase conversion efficiency.

CONCLUSION/SUMMARY

The project establishes a structured CRM funnel, implements intelligent lead nurturing, and provides interactive dashboards for real-time insights. Expected outcomes include a 30-40% reduction in CAC, improved lead-to-customer conversion, optimized marketing spend allocation, and actionable management insights. The project demonstrates that systematic CRM processes combined with data-driven analytics and AI-assisted personalization can significantly enhance the efficiency and effectiveness of MSME lead management and revenue growth.

REFERENCES

Google Colab :

<https://colab.research.google.com/drive/1XAJa3Y7Wjnz9j3UpCEZlzJWTD6tep48Q?usp=sharing>

Notion : <https://www.notion.so/c754c7910a6e4947a1b691481aad278d>