

# Sales Pipeline Analytics

## SiamEast Customer Analysis Enhancement

Project: SECustomerAnalysis Pipeline Analytics

Created: 2026-01-09

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## 1. BUSINESS FLOW (Full Loop)

INQUIRY -> COSTSHEET -> QUOTATION -> SALE ORDER -> INVOICE

Database Connections:

- Sale System DB: dbo.Inquiries, dbo.Quotations, dbo.SaleOrders, dbo.CostSheets
- Express DB (Midnight): Midnight.Invoice, Midnight.InvoiceItems
- Link: SaleOrders.SaleOrderNo -> Invoice.SaleOrderNumber

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## 2. EXECUTIVE REQUIREMENTS

### 2.1 Key Questions to Answer:

- "Pipeline Value?" -> Plan Revenue
- "Conversion Rate?" -> Measure closing efficiency
- "Top Seller?" -> Allocate work & Incentive
- "Profit Margin?" -> Control cost
- "Pending Deals?" -> Accelerate closing
- "Trends?" -> Forecast

### 2.2 Target KPIs:

- Revenue Growth: +10% YoY
- Profit Margin: >=25%
- Conversion Rate: >=30%
- Sales Cycle: <30 days
- Pipeline Coverage: >=3x target

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## 3. PROPOSED FEATURES (6 Pages)

### 1. Pipeline Dashboard

Route: /pipeline/dashboard

Components: Funnel, Value Cards, Conversion Rates

### 2. Sales Team Performance

Route: /pipeline/sales-team

Components: Leaderboard, Individual Cards, Target vs Actual

### 3. Conversion Funnel

Route: /pipeline/funnel

Components: Sankey Diagram, Drop-off Analysis, Time in Stage

### 4. Profitability Analysis

Route: /pipeline/profitability

Components: Margin Heatmap, Cost Breakdown, Low Margin Alerts

### 5. Aging & At-Risk

Route: /pipeline/aging

Components: Aging Buckets, At-Risk Table, Follow-up Reminders

### 6. Forecast & Trends

Route: /pipeline/forecast

Components: Revenue Forecast, Pipeline Trend, Seasonal Analysis

## 4. IMPLEMENTATION PHASES

### Phase 1: Foundation

Backend structure, PipelineCalculator, Basic funnel query

### Phase 2: Core Features

Sales team endpoints, Conversion rates, Dashboard pages

### Phase 3: Advanced Analytics

Aging analysis, At-risk detection, Forecast, Charts

### Phase 4: Polish & Testing

Caching, Performance, Error handling, UAT

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## 5. CONFIRMED REQUIREMENTS

DB Connection:	Same server - can query across dbo.* and Midnight.* schemas
Probability:	Calculate from historical conversion rate per salesperson/product
Permission:	Phase 1 = No filtering, show all data to everyone

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## 6. SUCCESS METRICS

Adoption	80% of sales team using daily
Decision Speed	<5 min to identify issues
Data Accuracy	99% match with source
Performance	<2 sec page load

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