

Marketing and Sales Funnel Analysis



2020 – 2024

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November 2024

Objective

Understand customer behavior and optimize marketing and sales strategies to drive revenue growth.



1. Leads Conversion, Leads Quality and Sales Cycle Efficiency
2. Historical Trends: Leads Conversion and Revenue
3. Channel Performance: Leads Conversion and Revenue
4. Customer Segmentation

20.8%

Leads to Sales Conversion

41%

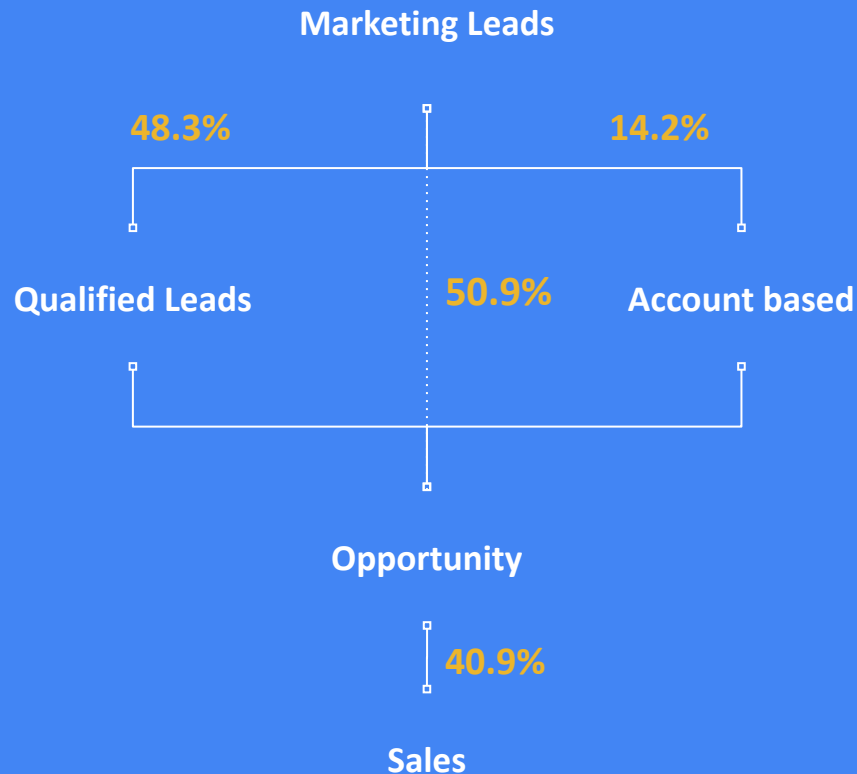
Opportunities to Sales Conversion
(Count & Amount)

25%

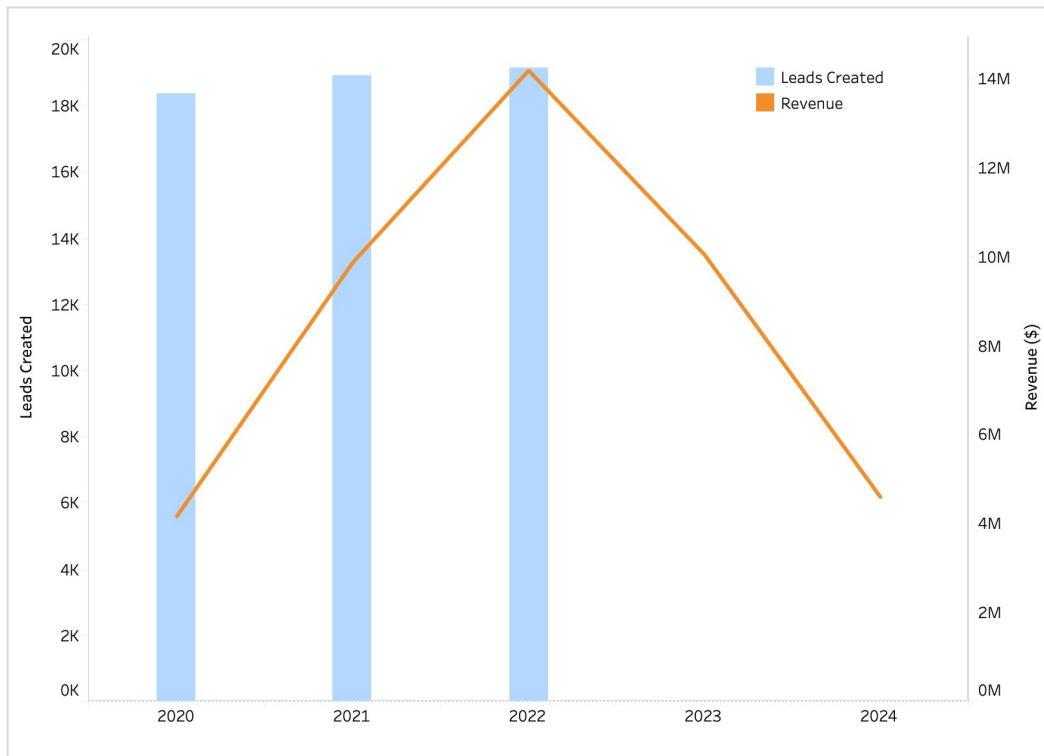
Completed Leads Information
(Email, Industry & Region)

406 Days

Average Leads to Opportunities



Historical Trends*



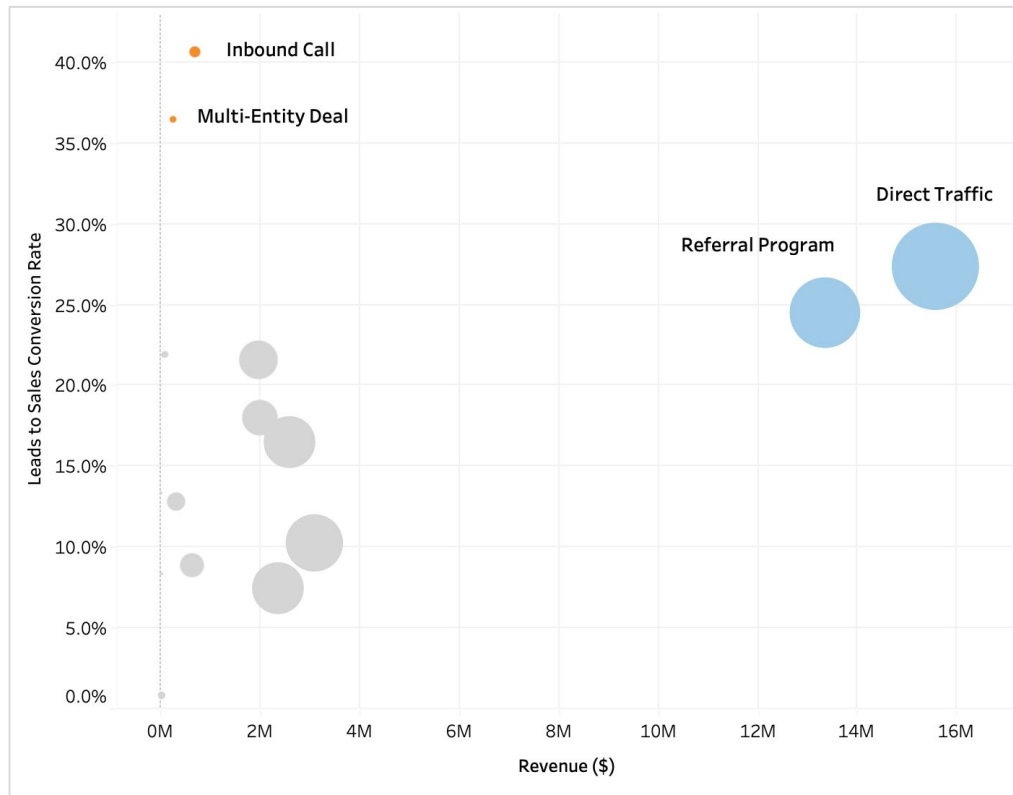
2020–2022 Growth

- Number of leads and Revenue steadily increased, peaking in 2022.

2023–2024 Decline

- No new leads created post-2022. Revenue declined in 2023 and 2024.

Channel performance



Direct Traffic, Referral Program

High revenue driven by high volume.

Inbound Call, Multi-Entity Deal

Highest conversion rate

Customer Segmentation

60% US based*

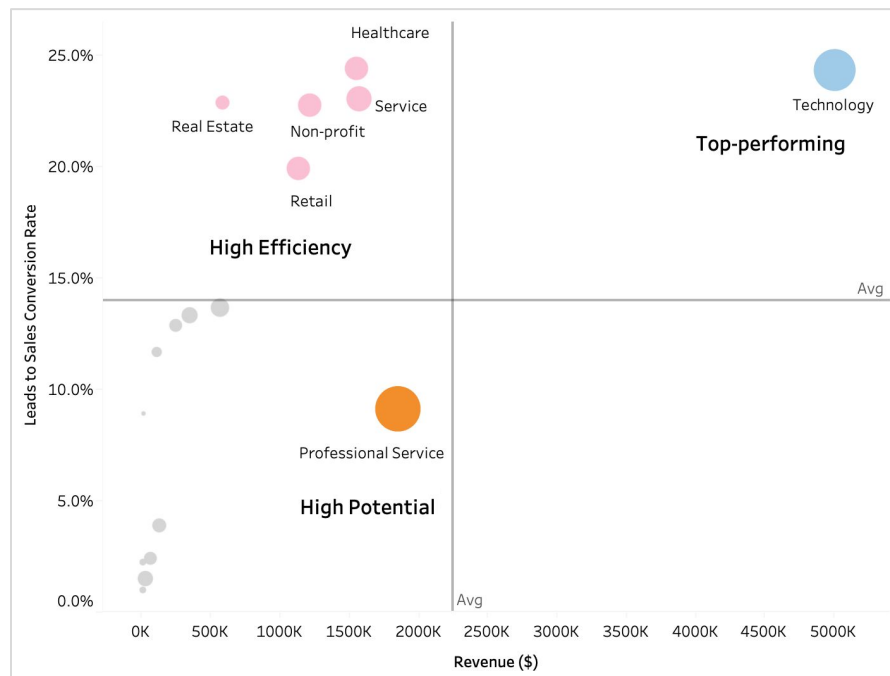
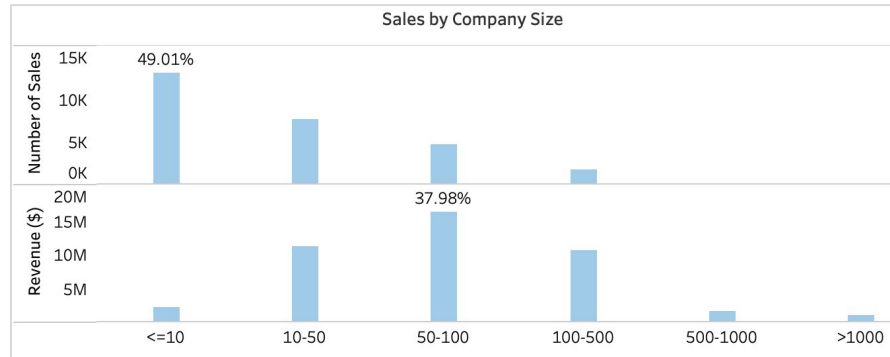
93.4% company size under 100

- **<=10**: highest volume (49%)
- **50-100**: 38% revenue contribution

3 Industry* Segments for Revenue Growth

- **Top-performing**: High volume, High conversion rate & High revenue.
- **High Efficiency**: High conversion rate, Lower Volume
- **High Potential**: High volume, Lower conversion rate

*Region and industry contributions are based on incomplete data.



Summary

Lead and Sales Efficiency:

- Overall Conversion Rate: 20% from leads to sales.
- Improvement needed in lead data quality and shorten the time of sales cycle.

Pipeline Challenges:

- No new leads created since 2022, resulting in a revenue decline in 2023 and 2024.

Channel Performance:

- Direct Traffic and Referral Programs channels have the highest revenue driven by high lead volume. Inbound Calls and Multi-Entity Deals achieve highest conversion rates.

Customer Segmentation:

- Small Businesses (<10 employees) account for 49% of the customer base but generate lower revenue. Larger Businesses (50–100 employees) drive the highest revenue.
- Industries can be divided into 3 segments: Top-Performing, High Efficiency and High Potential

Recommendation

- 1. Reignite Lead Generation:** Analyze why lead generation stopped post-2022 and restart with proven channels like **Direct Traffic** and **Referral Programs** to quickly rebuild the pipeline.
- 2. Improve Data Collection:** Ensure complete lead and customer information.
- 3. Optimize Sales Process:** Identify delays in the sales cycle and implement automation tools (e.g., lead scoring) to prioritize, nurture, and follow up faster.
- 4. Focus on High-Value Opportunities:** Prioritize **larger businesses (50–100 employees)** for higher profitability
- 5. Tailor Industry-Specific Strategies:**
 - **High-Efficiency (e.g., Healthcare):** Invest in awareness campaign to expand leads.
 - **High-Potential (e.g., Professional Services):** Improve conversion rates with tailored messaging.
 - **Top-Performing (e.g., Technology):** Deepen client engagement to enhance retention and loyalty.