

Please help me to identify "zombie" opportunities in Salesforce via engagement analysis.



## 1 DE: Architecture

Write the design document



### Design Specifications

Table #10

- name: fct\_opportunity\_health
- description: Scores each opportunity's health to identify 'zombie' deals based on sales engagement.
- source\_tables:
  - [int\_opportunities\_with\_age, int\_activities\_per\_deal]
- columns:
  - name: opportunity\_health\_score
  - description: Prioritized Rules for Health Score [0-100]
    1. High Engagement (>=5 activities in 30d) => 90
    2. Stale Deal (no activity > 30d) => 10
    3. Stuck Deal (in stage > 90d) => 25
    4. default => 60

Table #9

- name: int\_activity\_summary
- ...
- +10 tables

## 2 DE: Implementation

Write SQLs to build DE DAG

Raw Data Sources



DE-DAG

## 4 DI: Insight Generation

Write Python / SQL to generate open-ended analysis

Semantic-Layer Data



### Codebase of DE-DAG

sqls  
staging  
  stg\_opportunity.sql  
intermediate  
  int\_opportunity\_pipeline.sql  
marts  
  marts  
  revenue\_forecast.sql

sqls  
intermediate **Fix 3 SQLs**  
  int\_opportunity\_velocity.sql  
  ...  
marts **Add 4 SQLs**  
  fct\_sales\_velocity.sql  
  fct\_funnel\_conversion.sql  
  ...

Sales Velocity & Funnel Conversion?

## 3 DE: Evolution

Write SQLs to fix/update DE DAG



### Open-Ended Analysis

#### Analytical Report

Our Q3 analysis shows that 40% of the sales pipeline value is comprised of "unhealthy" opportunities that have seen no sales activity in over 30 days.

#### Key Insights

Stale deals are inflating the forecast, which masks a critical slowdown in sales velocity.

#### Actionable Recommendations

Review all deals scoring under 30 weekly to force a decision: re-engage or disqualify.