

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) \Rightarrow 90
 2. Stale Deal (no activity > 30 d) \Rightarrow 10
 3. Stuck Deal (in stage > 90 d) \Rightarrow 25
 4. default \Rightarrow 60

Table #9

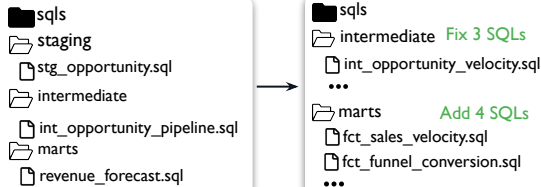
- **name:** int_activity_summary
- ...
- +10 tables

② DE: Implementation

Write SQLs to build DE DAG



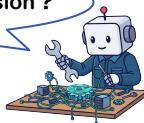
{ } Codebase of DE-DAG



Sales Velocity & Funnel Conversion ?

③ DE: Evolution

Write SQLs to fix/update DE DAG



④ DI: Insight Generation

Write Python / SQL to generate open-ended analysis



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.