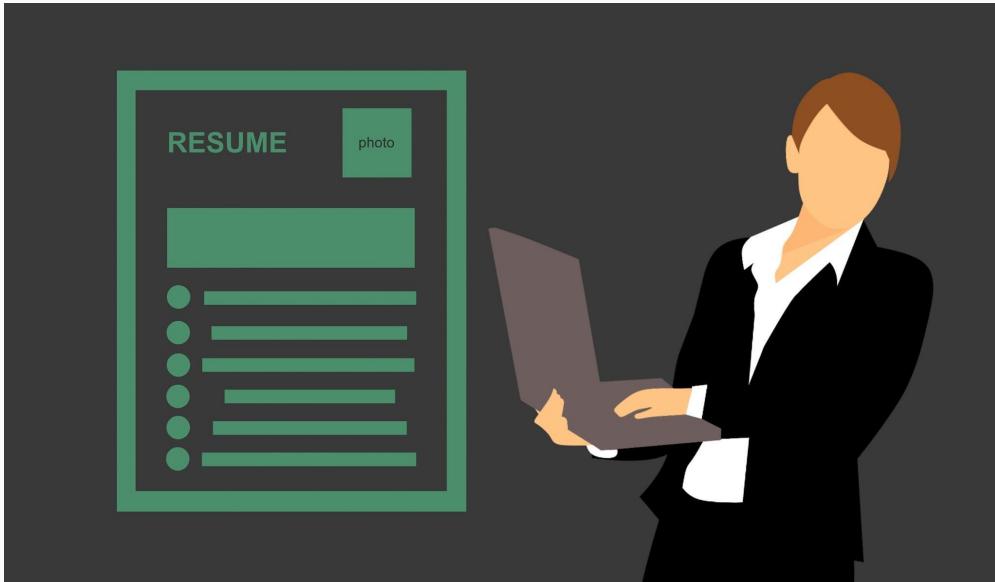


PeopleU Sales Funnel Analysis



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1. Executive Summary

Project Description:

analyze our customer journey and identify opportunities to improve the performance of our funnel.

Objectives:

Identify funnel bottlenecks and improve conversion from Leads Registered → Deal Won.

Tools:

- *Data Cleaning and analysis : SQL Bigquery, spreadsheet*
- *Visualization : Tableau, Spreadsheet*

Metrics:

- *Conversion rate/Funnel Metrics*
- *Drop-Off rate*

Analysis Result:

- *Biggest bottleneck : approach – discussion – offer.*
- *CPC are the best value for session source*
- *“Not Answered” : majority reason for drop-off leads.*

Recommendation:

- *Focus on sales team approach – discussion – offer.*
- *Open negotiation after offer sent.*
- *For “Not Answered” Reason, Add more alternative contact method*

2. Background of Project

PeopleU is a B2B Software as a Service (SaaS) company that offers a human resource management application. PeopleU has established cooperation with several companies with various scales and industry. PeopleU provides a comprehensive HR management solution with many features.

Currently, the focus of PeopleU is to increase its customer with several initiatives such as evaluating the marketings and acquisition process, also considering offering price packages. Experts, as the person in charge, tries to guide the DA team to provide the proper evaluation and advice regarding how data can be used to provide analysis to support those initiatives.



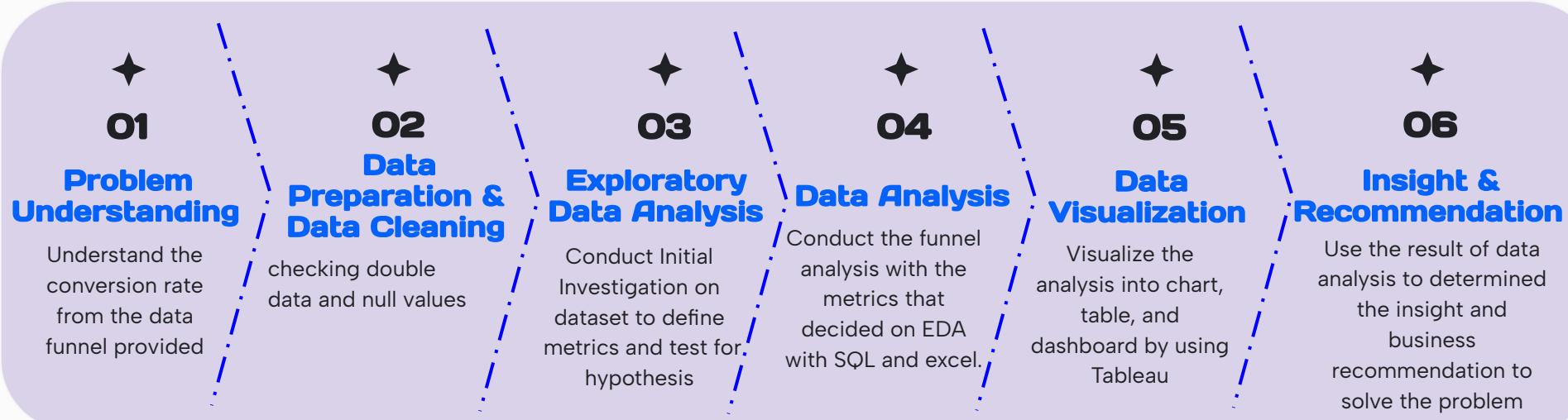
Business Problem

Despite a high number of leads entering the funnel across industries, only 26% of total registered leads convert into Deal Won. This indicates significant drop-off across mid-funnel stages, suggesting inefficiencies in lead qualification, follow-up, or sales execution.

Objective of analysis

To analyze the end-to-end lead funnel and determine the key stages contributing to low conversion rates. Funnel analysis will be used to quantify drop-offs at each step and guide targeted interventions that can increase the Deal Won conversion.

3. Methodology



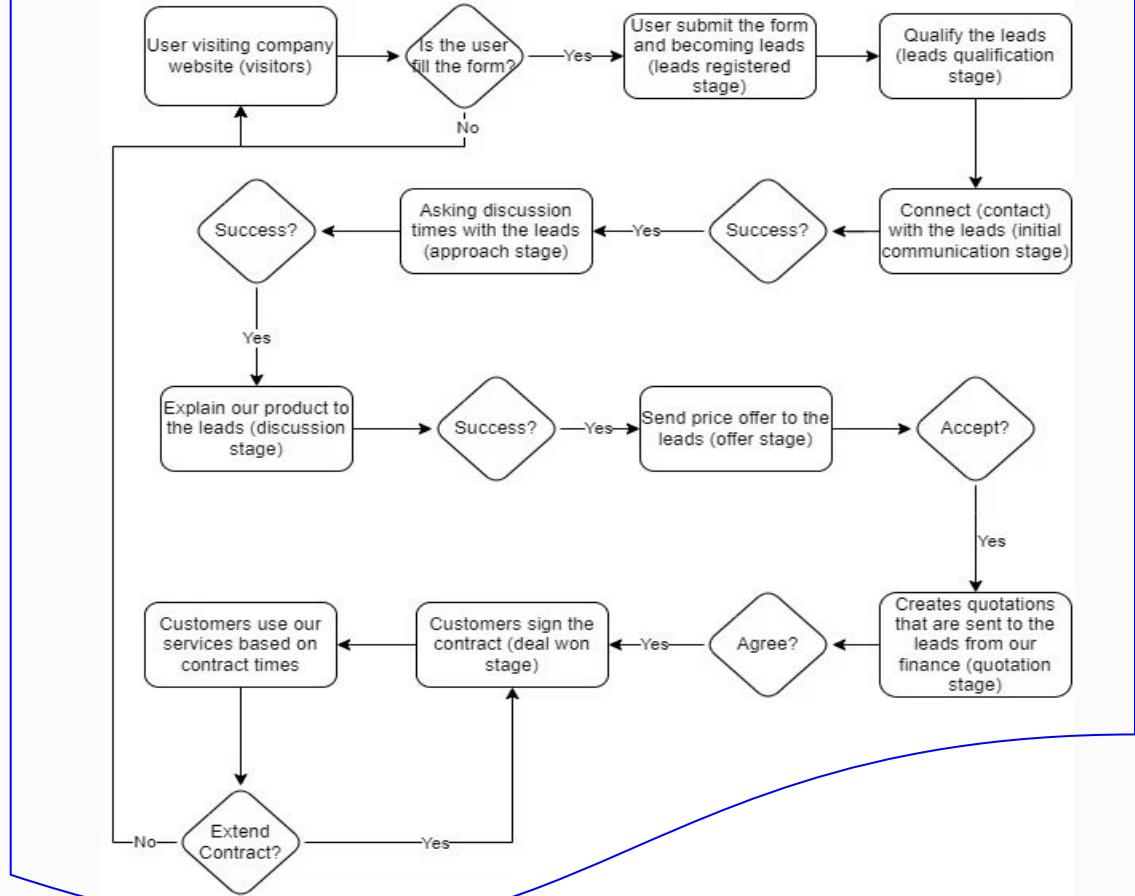
4. The Funnel Metrics

Leads registered
Leads qualification
Initial communication success
Approach success
Discussion success
Offer sent
Quotation received
Deal won
Renewable

The Key Metrics

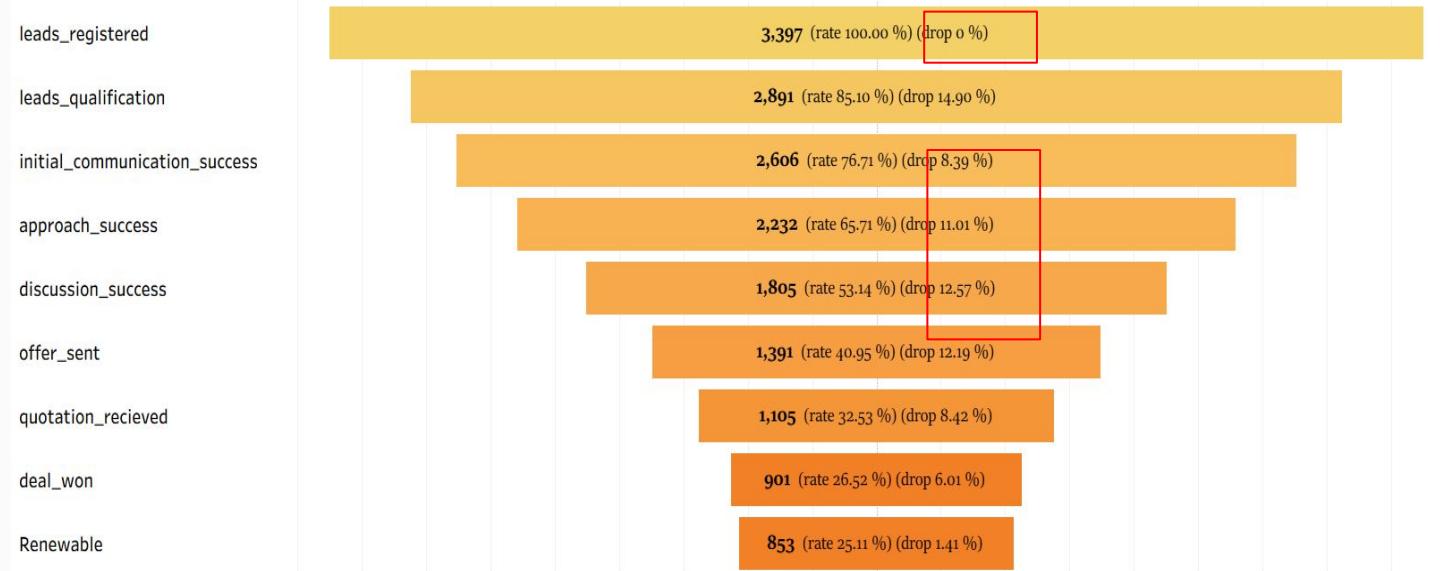
Cumulative Conversion Rate
Drop-off Rate

The Business Flow



5. The Funnel Analysis

Funnel Analysis



Format : Lead count (cumulative conversion rate) (drop-off rate)

Our funnel starts strong with 3,397 leads, but only 26.52% convert into **Deal Won**.

The largest drops occur at **qualification** (14.9%), and 3 stages in the middle : **approach - discussion - offer** (11-12%).

These mid-funnel weaknesses prevent a significant number of leads from progressing.

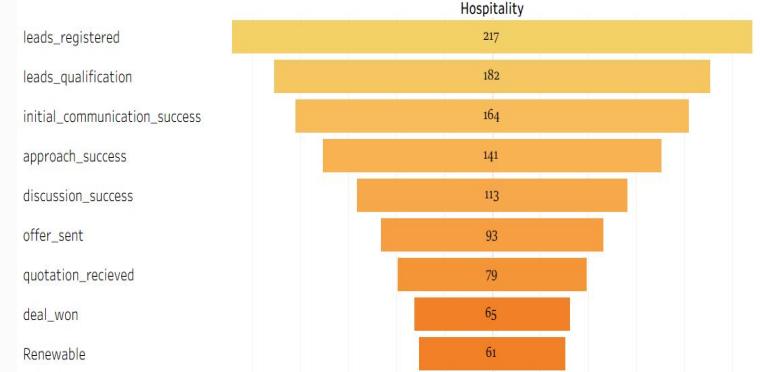
By improving these stages, we can dramatically increase our total conversion without needing more leads.

5. The Funnel Analysis - Industries

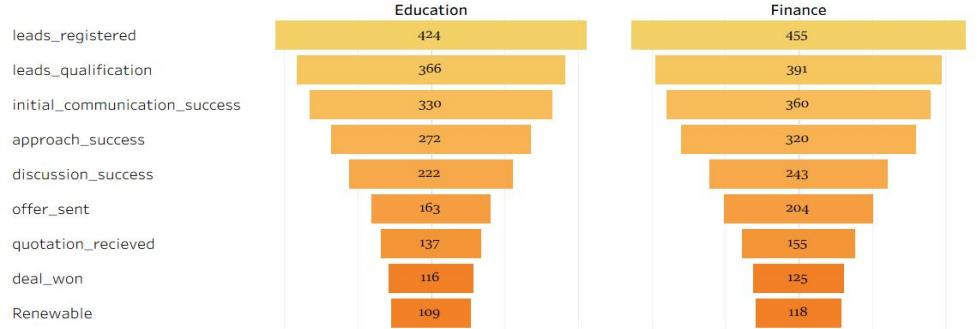
Funnel Analysis - industries



Funnel Analysis - industries



Funnel Analysis - industries



Summary :

- Top leads registered : Technology, F&B, and Retail.
- Hospitality is the best-performing funnel overall with best deal conversion (29.95%), but the lowest leads registered count.
- Finance & Technology: Large drop in Discussion stage (13–17%)

Insight :

- Industry funnels are more similar than different – fixes can be standardized

5. The Funnel Analysis - Session Source

Funnel Analysis - Session Source



	CPC	direct	Organic Search	Organic Social	Referral
Avg Monthly CAC	Rp 536,719.16	Rp 1,073,287.72	Rp 1,209,122.96	Rp 1,082,536.63	Rp 1,560,944.58

Summary :

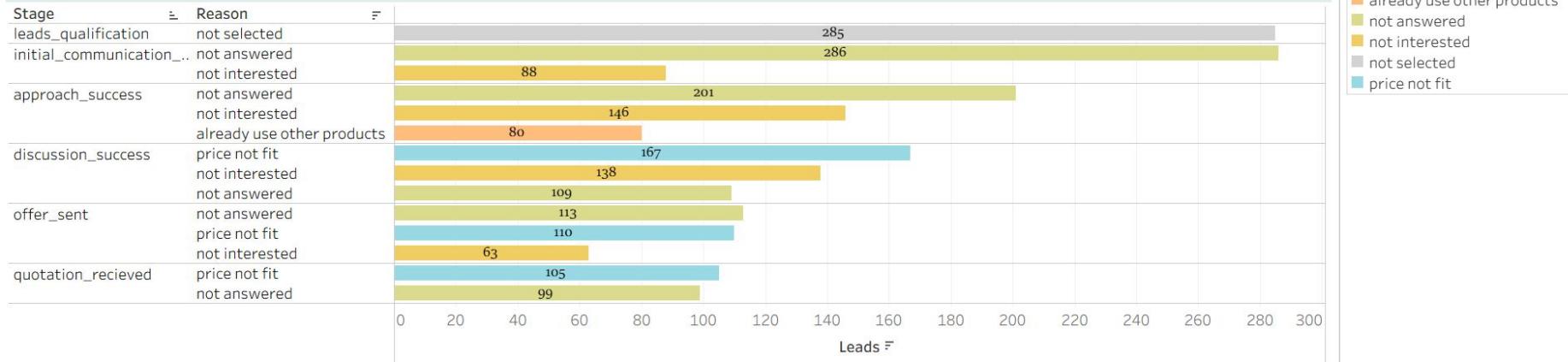
The session-source funnels are more similar than different, indicating that most performance issues stem from internal sales process bottlenecks. This means improvements can be standardized across session source.

Insight :

CPC is currently the most efficient acquisition session source, delivering the highest number of winning deals at the lowest cost.

5. Drop-off Rate

Drop-Off Leads



Summary :

Majority the reason for drop-off leads in the early stage is “not answered”, while “price not fit” is majority for the rest of stages.

Insight :

“Not answered” is the main reason for drop-off.

6. Insight and Recommendation

Insight

- mid-funnel performance is the primary issue
- Industry funnels are more similar than different
- CPC is currently the most efficient acquisition session source, delivering the highest number of winning deals at the lowest cost.
- “Not answered” is the main reason for drop-off, follow up by “Price Not Fit”

6. Insight and Recommendation

Recommendation

- Leads Registered : Increase CPC budget and Investigate why Referral is expensive.
- Qualification : Strengthen registration validation to improve user qualification
- Initial Communication and approach : For “Not Answered” - that majority reason in early clusters, Add more alternative contact method to approach.

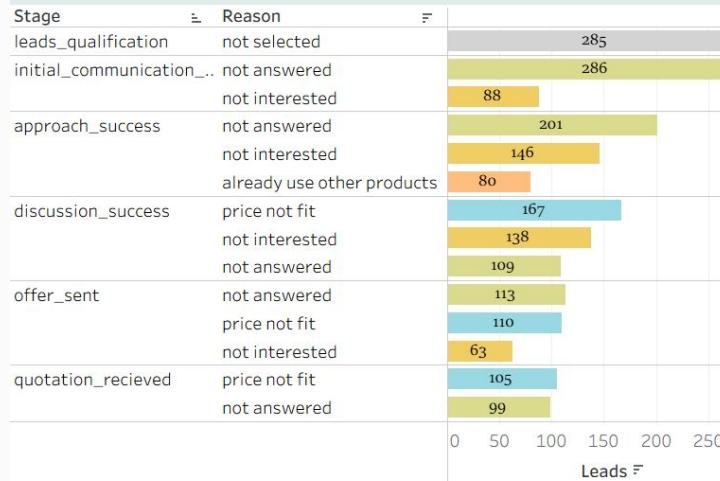
6. Insight and Recommendation

Recommendation

- Approach - Discussion : Strengthen sales engagement by improving follow-up processes, lead qualification, response time management, and customized proposal methods across industries.
- Offer and quotation : Open structured post-offer negotiations to validate price fit and improve deal conversion.

Tableau Dashboard

Drop-Off Leads



Funnel Analysis

leads_registered
leads_qualification
initial_communication_success
approach_success
discussion_success
offer_sent
quotation_recieved
deal_won
Renewable

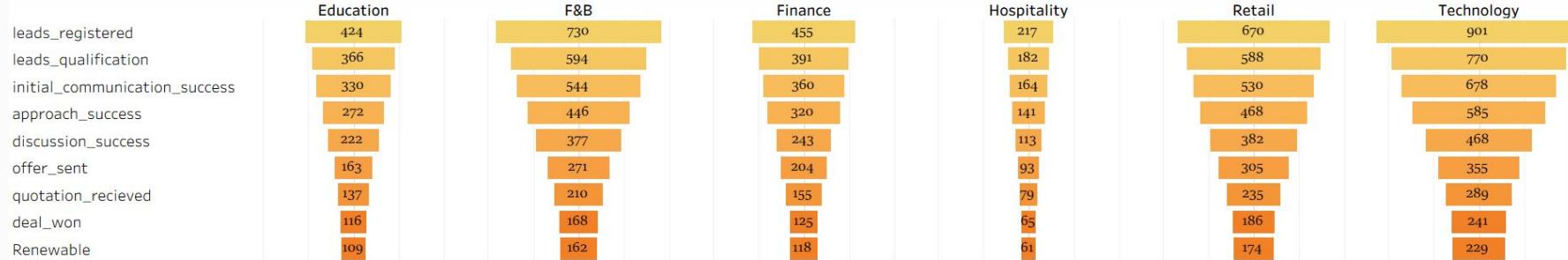


Filter

Year of Leads Registered
(All)

Session Source
(All)

Funnel Analysis - industries



Appendix - query

```
SELECT f.funnel_id, f.leads_id,
l.session_source_code, ss.session_source,
l.industry_code, i.industry,
l.leads_registered,
l.number_of_employee,
-- CASE WHEN c.reten_flag = 1 THEN YEAR(c.date) ELSE f.stage_id END stage_id, CASE WHEN c.reten_flag = 1 THEN CONCAT("Renewable ", CAST(YEAR(c.date) AS CHAR)) ELSE s.stage END stage,
CASE WHEN c.reten_flag = 1 THEN 109 ELSE f.stage_id END stage_id, CASE WHEN c.reten_flag = 1 THEN "Renewable" ELSE s.stage END stage,
df.stage_id AS last_stage,
f.timestamp,
f.reason,
c.subscription_type,
c.user_price,
d.user_price_after,
d.discount_type_code,
dt.discount_type,
dt.month_discount,
c.gmv,
```

Appendix – query

```
sv.nps,sv.pre_sales_info,sv.sales_knowledge,sv.respon_time,sv.communication
FROM funnel f
INNER JOIN leads l ON f.leads_id = l.leads_id
INNER JOIN stage s ON f.stage_id = s.stage_id
LEFT JOIN contract c ON l.leads_id = c.leads_id AND f.stage_id = 108
LEFT JOIN discounts d ON c.contract_id = d.contract_id
LEFT JOIN discount_type dt ON d.discount_type_code = dt.discount_Type_code
LEFT JOIN sessions_source ss ON l.session_source_code = ss.session_source_code
LEFT JOIN industries i ON l.industry_code = i.industry_code
LEFT JOIN survey sv ON l.leads_id = sv.leads_id
INNER JOIN
( SELECT leads_id, MAX(stage_id) stage_id
  FROM ( SELECT leads_id, stage_id
    FROM funnel
  UNION ALL
  SELECT leads_id,109 AS stage_id
  -- YEAR(DATE) stage_id
  FROM contract
 WHERE reten_flag = 1 ) f
 GROUP BY leads_id) df ON l.leads_id = df.leads_id
ORDER BY f.leads_id,s.stage_id
```

Thank You



You can check the tableau public here

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