SALES PIPELINE 2024

PERFORMANCE ANALYSIS

Executive Overview

Performance Insights

Sales Pipeline Overview

Enables businesses to monitor the sales pipeline and deal progress.

Facilitates resource allocation and revenue growth optimization through targeted industry and lead selection.

£10.6M	£4.1K	2139
Total Pipeline	Avg. Deal Size (won)	Total Opportunities
35.24% vs PY	93.94% vs PY	44.23% vs PY

£2.4M	£0.4M	98
Weighted Pipeline	Closed Pipeline	Closed Opportunities
16.92% vs PY	258.61% vs PY	84.91% vs PY

Count of Open Opportunities Pipeline
Select one to filter

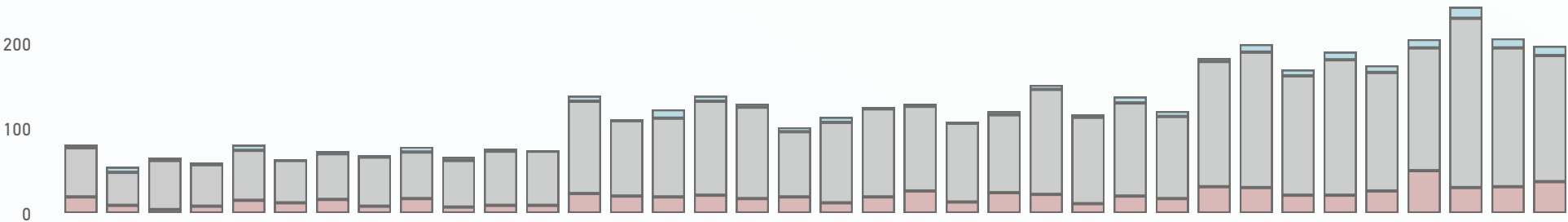| Stage	Count
3. Discovery	444
2. Pipeline Generation	333
1. Dormant	258
4. Scope	184
5. Proposal	184
7. Negotiate	158
8. Closing	79
6. Business Case	76
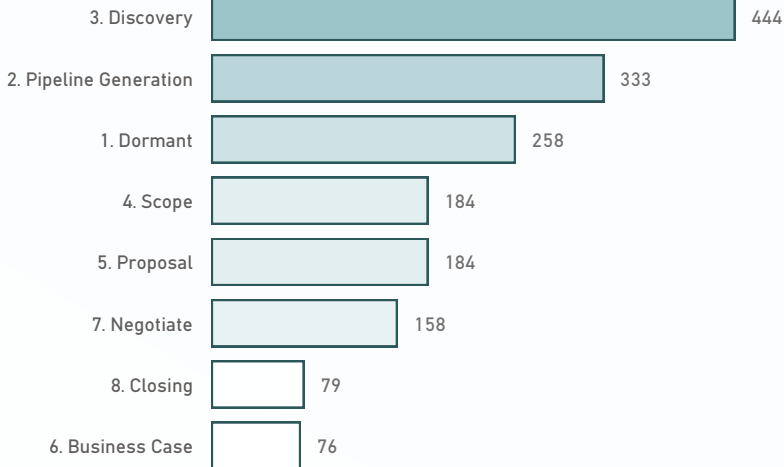
Industry	Weighted Pipeline	Total Pipeline	Pipeline Gained	Pipeline by Month	# of Opportunities	# of Opportunities by Month	Win Rate %	Revenue Rate %	Average of Probability of Closing
Financial Services	£504,226	£2,663,900	19%		334		21.1%	10.8%	25.2%
Private Wealth Management	£324,163	£1,859,626	25%		217		22.2%	8.7%	26.2%
Real Estate	£279,826	£982,017	23%		125		38.9%	8.3%	26.3%
Information Services	£270,760	£1,922,472	16%		203		23.7%	5.8%	25.3%
Pharmaceuticals	£263,734	£1,054,279	25%		196		20%	40.8%	22.9%
Insurance	£220,136	£1,022,280	21%		233		22.5%	15.6%	22.6%

Total Pipeline Amount / Opportunities By Stage Conclusion

Amount | # of Opps

● Lost ● Open ● Won

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Win Rate %
of Opportunities Won vs Lost

98

23.2%
18.4% PY

325
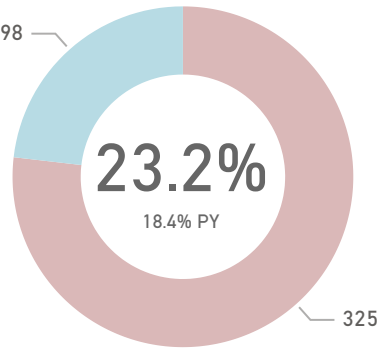
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Revenue Conversion Rate %
Total Pipeline Won vs Lost

£0.40M

10.9%
9.9% PY

£3.27M
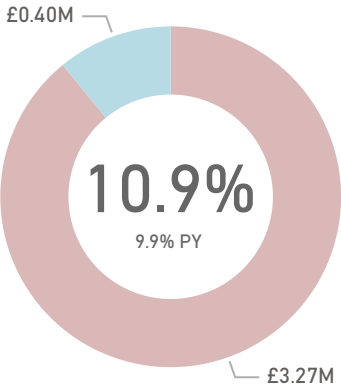
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Average Closing Probability Rate %
Open Opportunities only

24.49%

24.5%
26.4% PY

75.51%

25.0% 22.6% 26.6% 25.7% 23.3% 24.6%
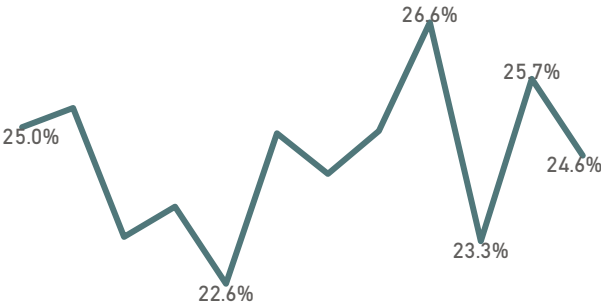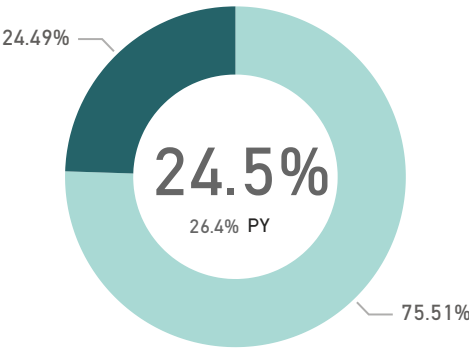
Sales Rep Performance
Won / Lost Opportunities | Size = Amount | Deals >3500

ID	Sales Rep	# of Opportunities	Pipeline Gained
1	Marcus Nguyen	513	20%
2	Amelia Bennett	503	26%
3	Isabella Patel	344	20%
4	Elijah Santiago	299	14%
5	Ava Rodriguez	369	19%
6	Noah Khan	111	16%