Predicting Sales Opportunities –

BADIR

I will try to follow BADIR framework to present my CAPSTONE PROJECT.

**B**usiness question

**What are the reasons behind successful or failed deals?**

* Is possible to predict which opportunities will be won, lost, or deferred?

The impacted segment is CHINA Sales Organization. Our stakeholder will be CHINA Sales Operations Team.

**A**nalysis plan

**Analysis goal: Determine drivers of won/lost deals, and try to predict current deals final outcome.**

* Hypotheses to be tested:
  + Frequency of activity of Opportunities become on lost deals.
  + Opportunities with higher amounts tend to be lost.
  + Opportunities with higher age tend to be lost.
* Data is required/available to test the hypotheses:

Historic log of changes for the different opportunities.

* What methodology will you employ?

Correlation analysis and Predictive Analytics

* Timeline: 2 weeks

**D**ata collection

* Information provided by CHINA Sales BI team. It was cleaned and organized in in logical order to group the features.

**I**nsights

Data is showing different trends related to Deals’ activity. There is a clear correlation between changes in 2 features or variables. The rest of features have less influence in the outcome.

Related to the second hypothesis, there is not clear relationship between the opportunity amount, and the probability of success or failure.

As all the analytical projects, the stakeholder needs to evaluate the model’s results vs their own business acumen. In this exercise the accuracy was very high (+95%), and I can suggest a very good level of confidence.

As an initial predictive intend in this business, I think the presented findings will help to set a different process related to deal’s management and avoid or reduce the loss of opportunities.

**R**ecommendations

* + To set a quarterly process to run predictive analysis related
  + To suggest to management a modification if the way the changes in the deals/opportunities are being logged. It needs to be a simpler way, powered by IT to log, store, and consult changes information.