

DEAL DIAGNOSTIC

Classifying Sales Outcomes

Jaime Garvey

PROBLEM STATEMENT



Quantity
vs.
Quality

QUESTION:

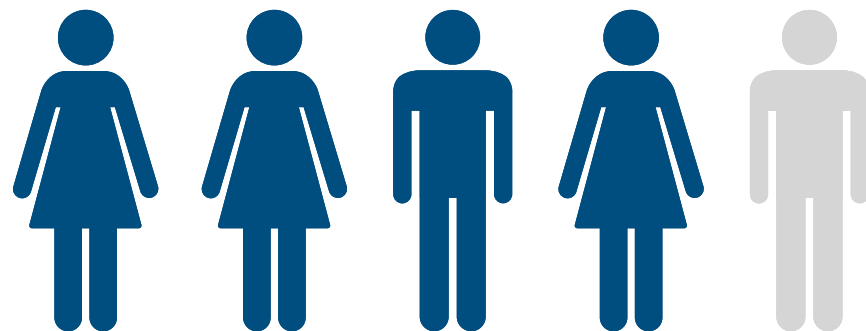
How can we help sales
prioritize deals?

DATA BY THE NUMBERS



89%

New Business



17%

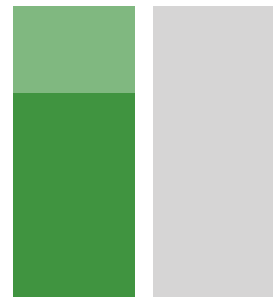
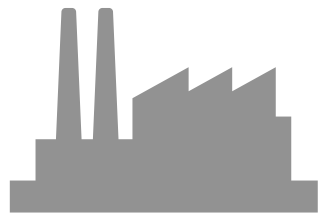
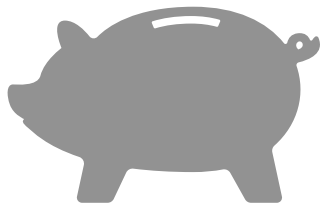
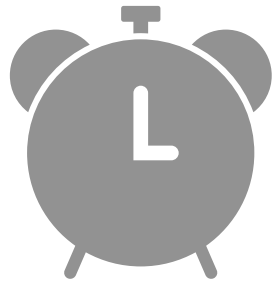
Deals Won
(New Business)



64%

Deals Won
(Returning
Customers)

METRICS & DATA



Win
Lose

Recall

FEATURES

TARGET

METRIC



METHOD



Random Forest Model

MODEL (APP DEMO)

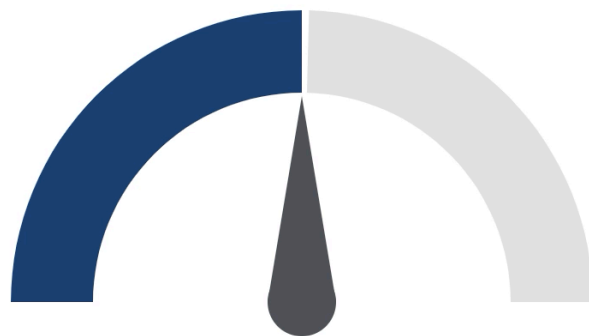
DEAL DIAGNOSTIC 2019

[ABOUT](#)

PREDICTION

INSIGHTS

Opportunity ID



Input Opportunity ID for Outcome Prediction

Let's imagine you are a sales representative. Your goal is to win as many deals as possible which can be compared to the seemingly impossible task of finding a needle in a haystack. What do you do?

Two options - talk to more people (quantity) or talk to the right people (quality). This model focuses on the latter.

Sales deals typically have a unique identifier - called an opportunity number or ID. Place in one of the follow numbers (12345, 12346, 12347) into model to get a sense of how we can use machine learning to identify which deals are won and lost.

From there, head over to the "Insights" page to explore the key attributes of sucessful deals.

RESULTS

89.7%
(Recall)

...of **Won** deals were
correctly classified.

KEY TAKEAWAYS

TIME

Faster is better

PRODUCT

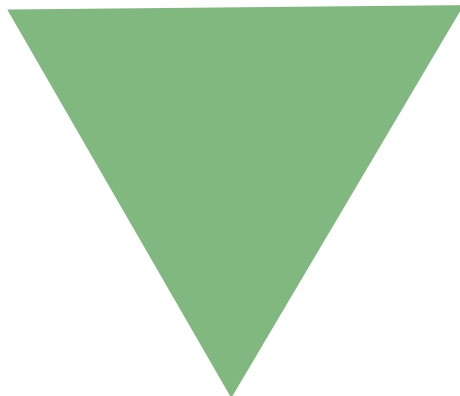
Higher Performing Products

CUSTOMER

Smaller Companies

CONTRACT

Smaller Contracts



SO WHAT?

$$\begin{array}{ccccc} 17\% & + & 7\% \uparrow & = & 25\% \\ \text{Deals Won} & & \text{Previously} & & \text{New Business} \\ & & \text{Lost Deals} & & \text{Potential Close} \\ & & \text{that} & & \text{Rate} \\ & & \text{Fit Criteria} & & \end{array}$$

THANK YOU

APPENDIX

