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Role: Growth Data Champion

Assignment: CRM Data Champion

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Part 1: Funnel Design + CRM Structuring

1A. Funnel Design Simulation

Stage	Definition	Upgrade Criteria	Owned By
Lead	Site visitor, form filled, ad clicked	Engages with a marketing touchpoint	Marketing
MQL	Matches ICP + downloads resource / attends webinar	Multiple engagements + matches ICP	Marketing
SQL	Requests demo / shows buying intent	Clear intent to purchase	Sales
Trial User	Signed up for free trial, incomplete onboarding	Has trial activity	Sales + CS
Customer	Purchase confirmed	Paid subscription	Sales

1B. CRM Configuration Blueprint

- Core Data Fields to Track:
- Contact Name
- Company Name
- Email & Phone
- Lead Source (Ad, Event, Referral, etc.)
- Industry
- Lifecycle Stage
- Lead Score
- Last Touched Date
- Engagement Notes

Automations to Implement:

- Auto-tag based on lead source
- Lifecycle stage auto-updates based on behaviour
- Reminders for no follow-up in 48 hrs
- Instant sales alert for demo bookings

Dashboard Views:

- Sales Rep View: Follow-ups due, response rate, active opportunities
- Growth Manager View: Conversion rates by funnel stage, campaign ROI

- CEO View: CAC trends, LTV trends, weekly funnel health summary

Part 2: Nurturing Mechanism Design

This section outlines a 3-tier nurturing strategy based on lead intent, using personalized messaging and automation tools.

Nurturing Strategy Table

Intent Level	Channel & Frequency	Content Type	Success Metric	AI Tools Leveraged
High (Booked demo, no close)	Email (2/week), WhatsApp follow-up	Case study, video testimonial, objection handling content	Demo rescheduled or response	ChatGPT, Mailchimp AI
Mid (Webinar/resource)	Email (1/week), LinkedIn DM (1/week)	Founder story, feature highlights, use-case newsletter	Clicks or re-engagement	Notion AI, Canva
Low (Newsletter only)	Email (bi-weekly)	Success stories, product updates, community invites	Open rate or new engagement	BeeFree, ChatGPT

Strategy Notes:

- High-intent leads receive more frequent and trust-building content to push toward conversion.
- Mid-intent leads are nudged with storytelling and relevance.
- Low-intent leads are lightly warmed to keep engagement alive.

Part 3: Funnel Analytics & CAC Optimization

To ensure the CRM and funnel strategy drives business growth, it's essential to monitor both performance and efficiency. This section identifies bottlenecks and proposes optimizations to improve ROI.

Underperforming Channel

- Channel: Facebook Ads

- Issue: High customer acquisition cost (₹3,000) with the lowest conversion rate (~1%)
- Risk: Poor ROI and unqualified lead targeting

Experiments to Improve Performance

1. A/B Test New Ad Creatives
 - Focus on pain points instead of generic features
 - Use testimonials or urgency-based messaging
2. Refine Audience Targeting
 - Build lookalike audiences using past MQLs
 - Retarget previous site visitors with intent signals

These experiments aim to lower CAC by 20–30% and increase lead quality.

Suggested CAC:LTV Dashboard Design

Metrics to Track:

- Customer Acquisition Cost (CAC) by source
- Lifetime Value (LTV) by customer segment
- Drop-off stage analytics (Lead → MQL → SQL → Customer)
- Weekly conversion trends and funnel velocity
- Revenue generated per marketing channel

Frequency & Audience:

- CEO: Weekly funnel health and CAC trends
- Sales & Growth Teams: Daily updates for lead flow and experiment results

Strategic Lens

This dashboard acts as a feedback loop — it converts user behaviour into performance signals.

The goal is not just to track metrics but to enable timely, data-driven action across the team.

Part 4: Strategic Summary

A truly effective funnel is not just a conversion mechanism — it is a clarity system. It turns noise into narrative and interaction into insight. In this context, CRM is no longer just a tracking tool — it becomes the command centre of growth.

My Strategic Lens as a Data Champion

My approach begins with alignment:

- Aligning internal teams with the customer's journey
- Aligning actions with actual impact
- Aligning data with decisions

A funnel cannot be static. It must respect human unpredictability, while the system around it responds with automation, empathy, and context.

Where Data Meets Storytelling

Dashboards don't drive decisions — stories do.

And stories don't just explain what happened — they reveal what matters.

This is where systems thinking intersects with narrative thinking.

As a Data Champion, I see my role as:

- Reducing the cost of confusion
- Increasing the speed of smart decisions
- Designing systems where clarity becomes inevitable

As a Data Champion, I see my role as reducing the cost of confusion and increasing the speed of smart decisions — by designing systems where clarity becomes inevitable.