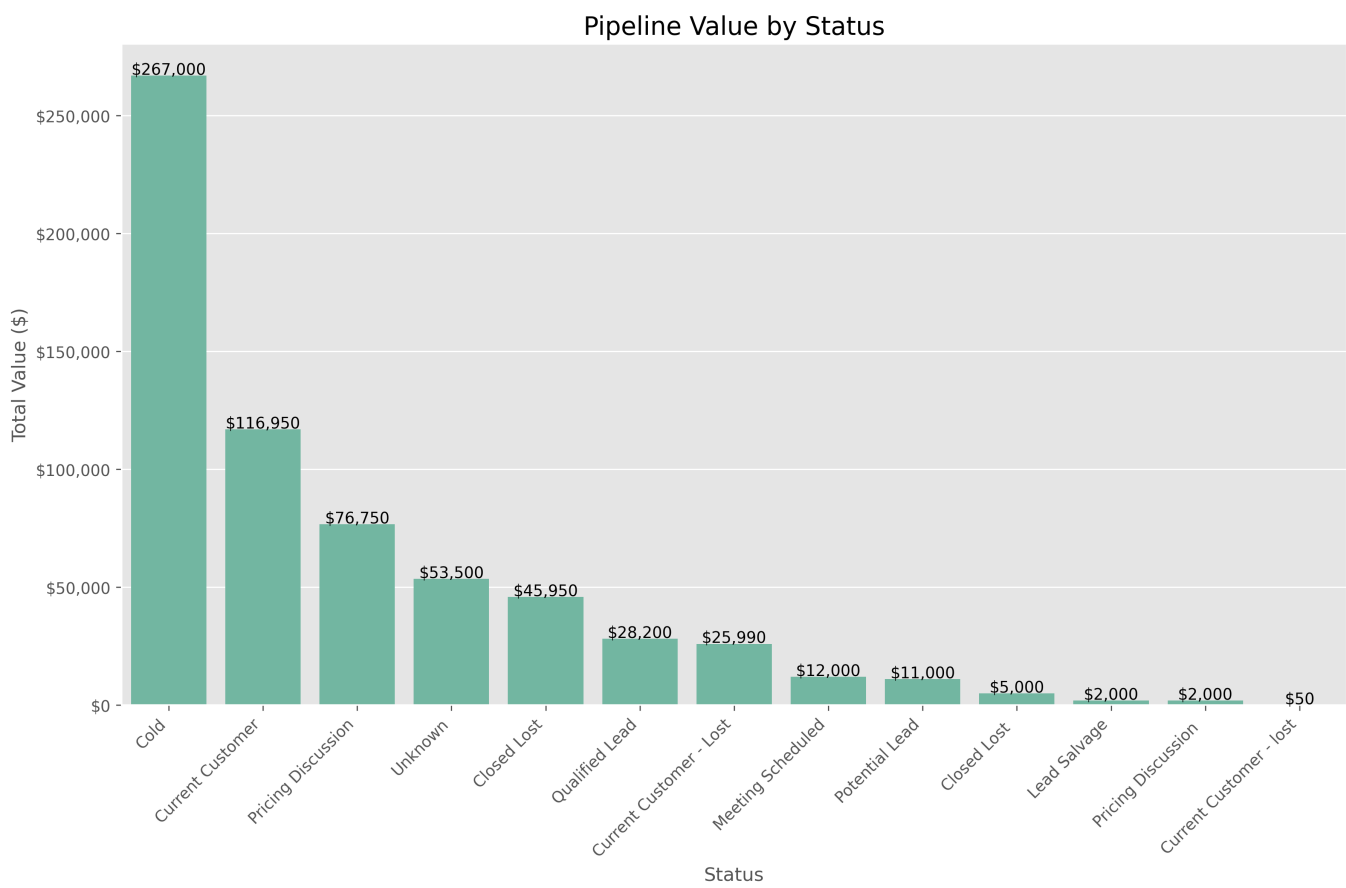


# Sales Pipeline Performance Presentation

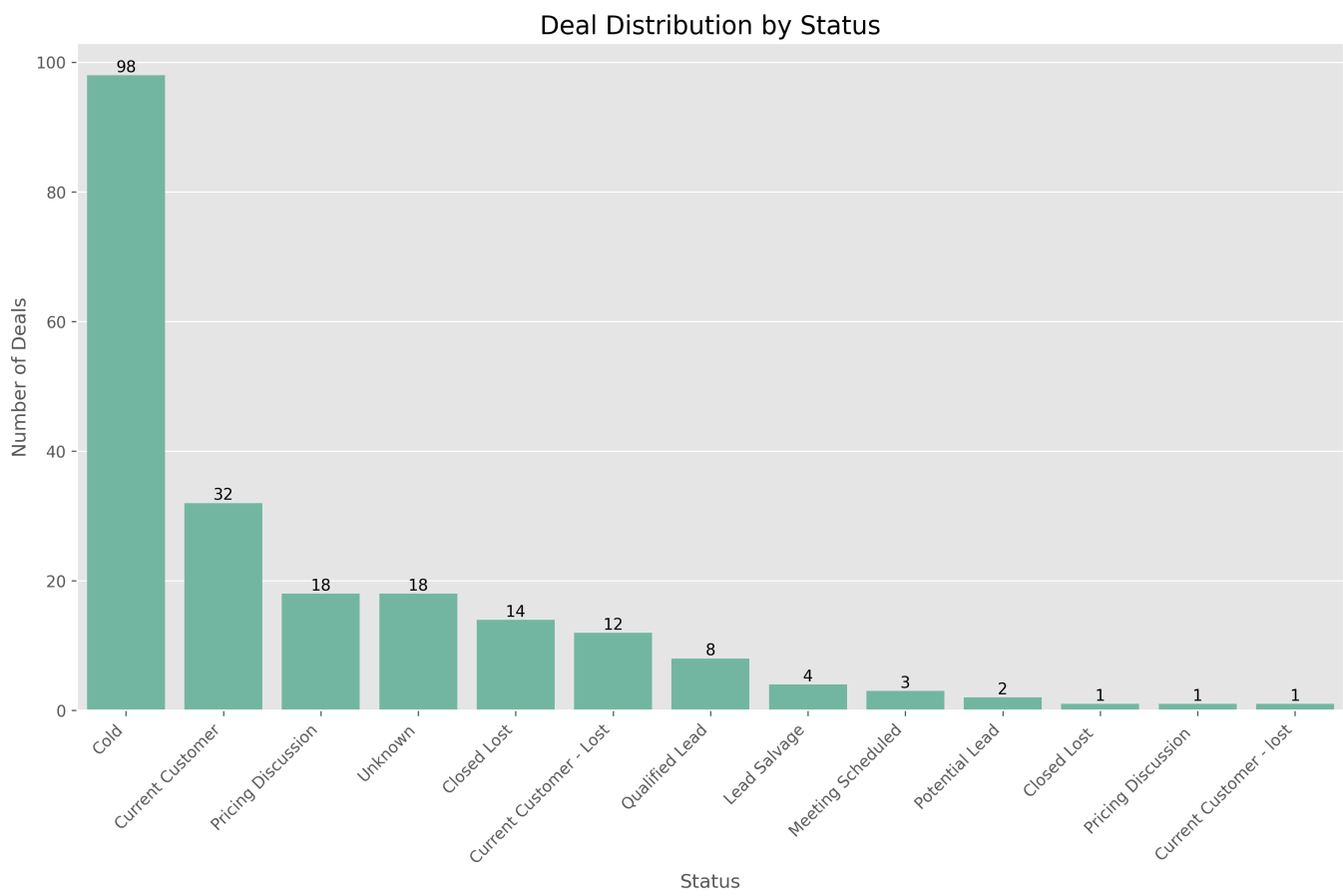
## Executive Summary

- **Total Pipeline Value:** \$646,390.00
- **Average Deal Size:** \$3,049.01
- **Win/Loss Ratio:** 0.00 (0 won, 14 lost)
- **Deal Status:** Majority in early stages (Cold, Current Customer)



# Pipeline Overview

## Status Distribution



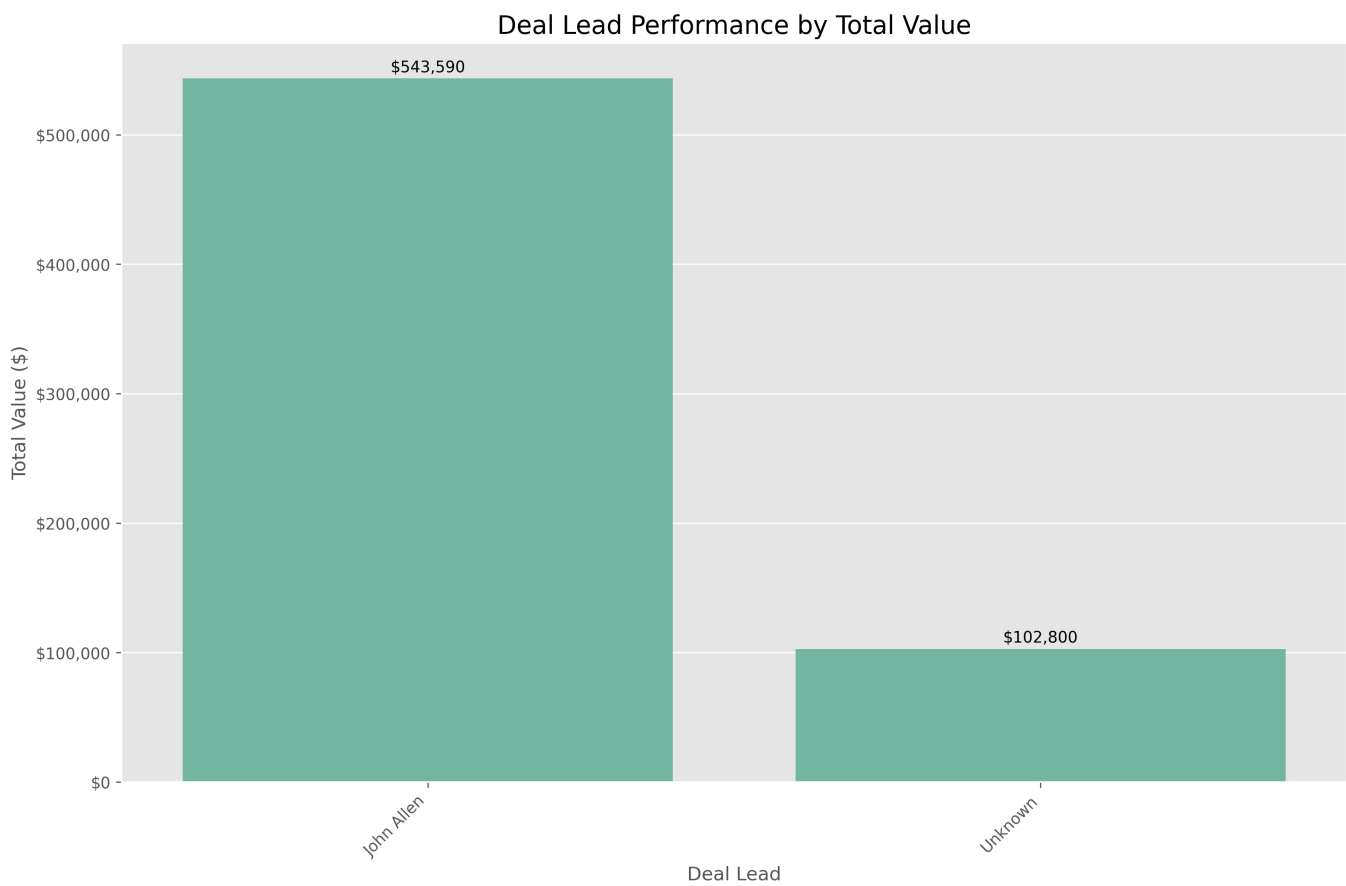
**Key Insights:** - **Cold Stage:** 98 deals, \$267,000.00 - **Current Customer:** 32 deals, \$116,950.00 - **Pricing Discussion:** 18 deals, \$76,750.00 - **Unknown:** 18 deals, \$53,500.00 - **Closed Lost:** 14 deals, \$45,950.00

## Pipeline Value by Stage

- Early-stage deals represent the largest portion of our pipeline
- No deals have been won in the current period
- Significant value (\$267,000.00) remains in the Cold stage

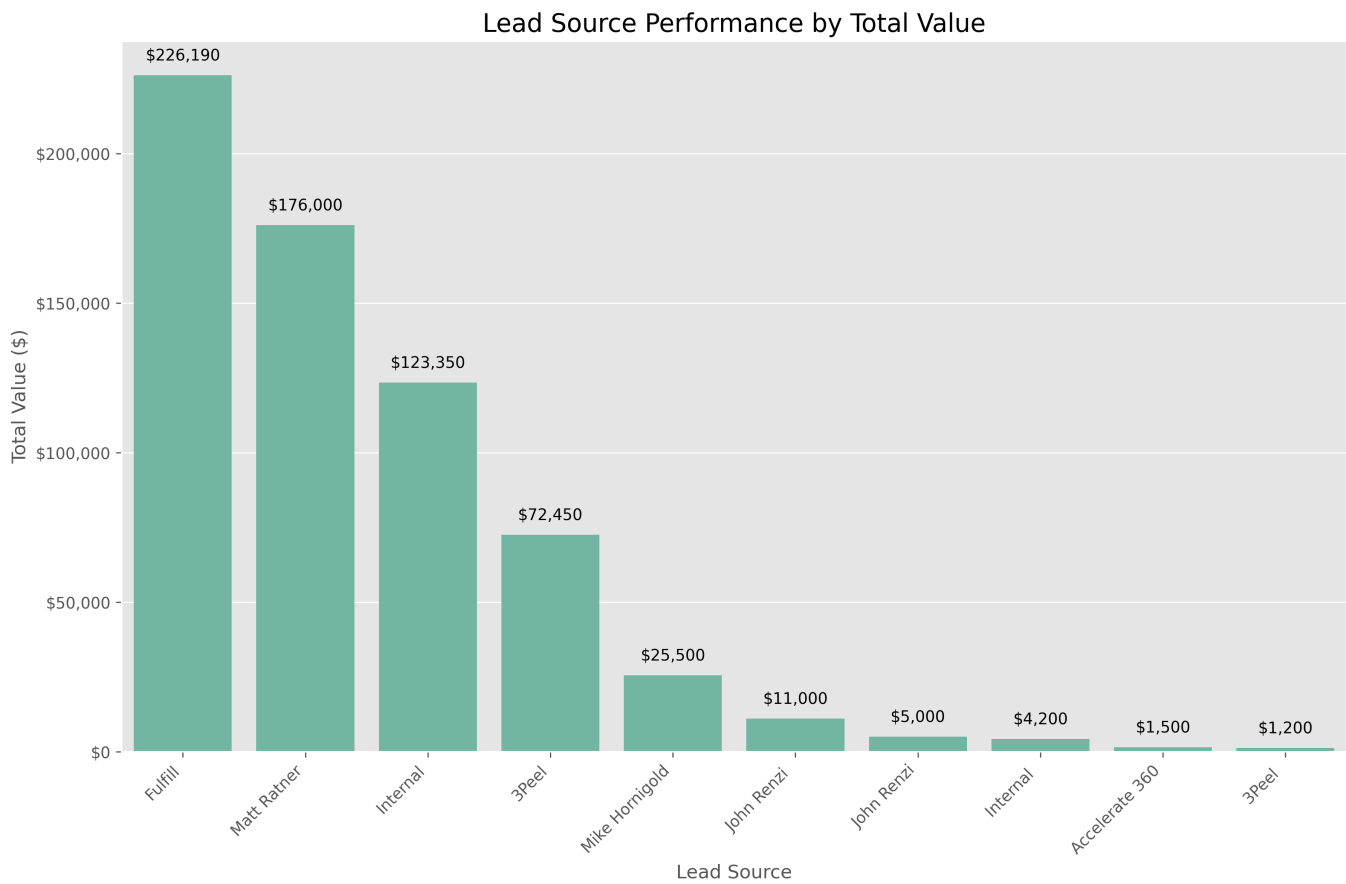
# Sales Performance Analysis

## By Deal Lead



**Top Deal Leads:** - **John Allen:** - Total Value: \$543,590.00 - Represents 84% of total pipeline value - **Unknown:** - Total Value: \$102,800.00 - Represents 16% of total pipeline value

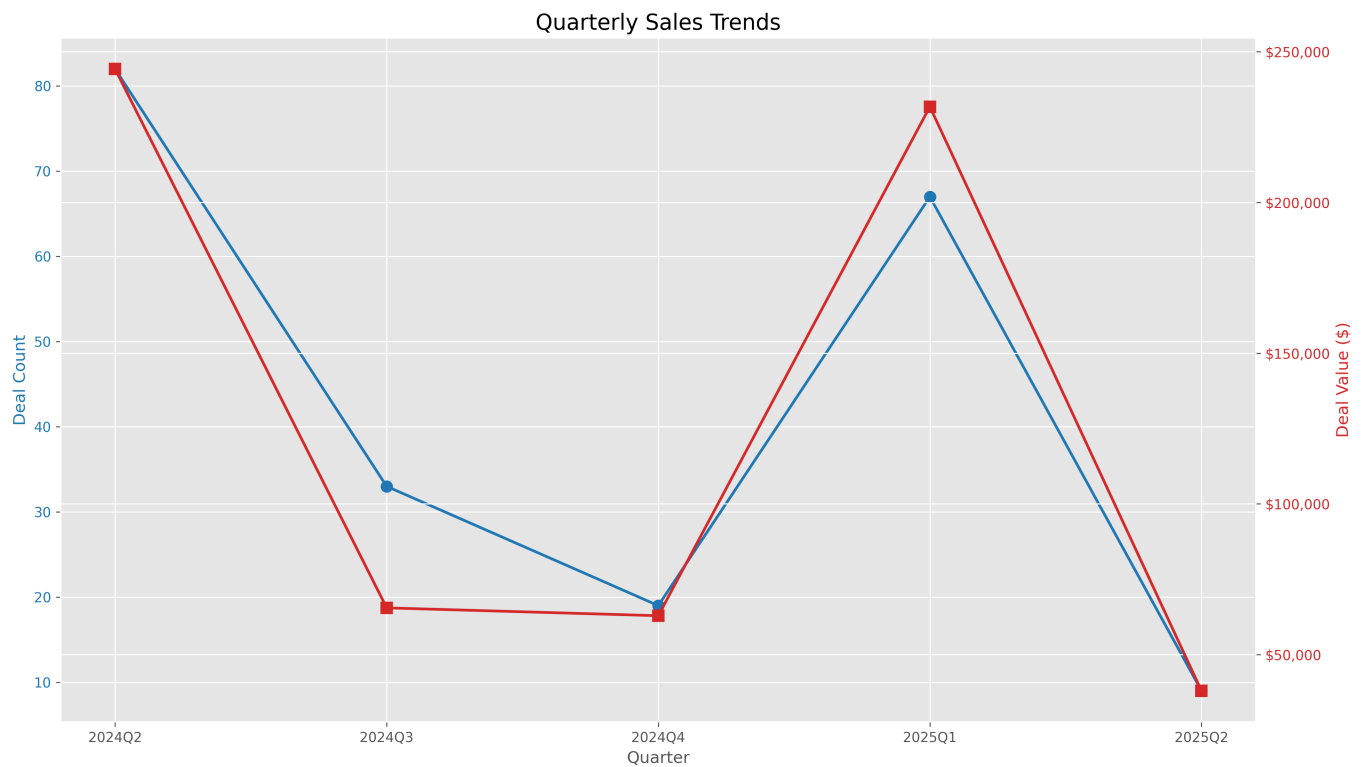
## By Lead Source



**Top Lead Sources by Value:** 1. **Fulfill:** \$226,190.00 (77 deals) 2. **Matt Ratner:** \$176,000.00 (36 deals) 3. **Internal:** \$123,350.00 (58 deals) 4. **3Peel:** \$72,450.00 (23 deals) 5. **Mike Hornigold:** \$25,500.00 (6 deals)

# Time-based Trends

## Quarterly Performance

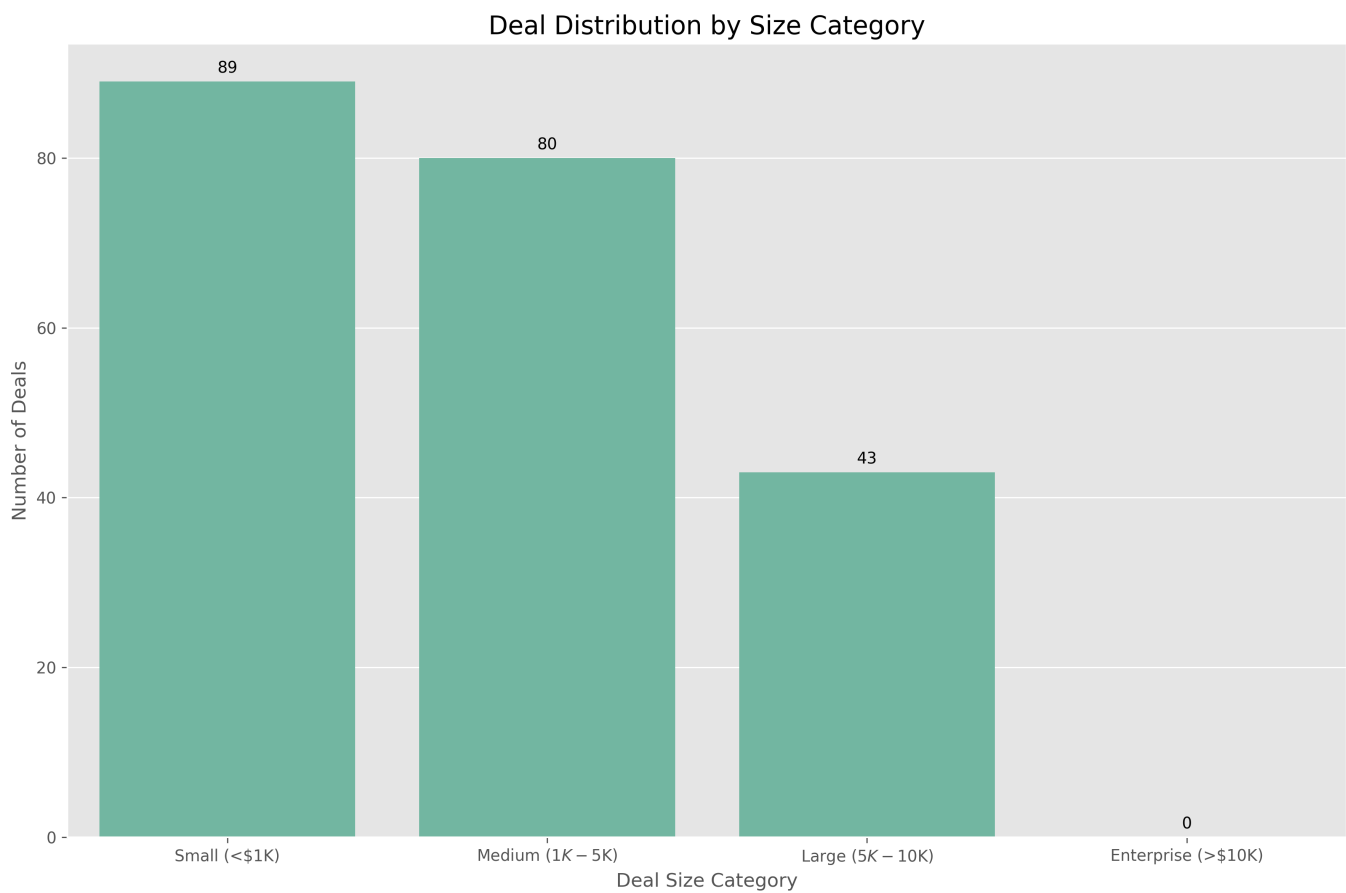


**Quarterly Highlights:** - **2024 Q2:** 82 deals, \$244,240.00 - **2025 Q1:** 67 deals, \$231,750.00 - **2024 Q3:** 33 deals, \$65,500.00 - **2024 Q4:** 19 deals, \$62,900.00 - **2025 Q2:** 9 deals, \$38,000.00

**Trend Analysis:** - Strong performance in Q2 2024 and Q1 2025 - Significant drop in Q3 and Q4 2024 - Early Q2 2025 showing lower numbers (potentially incomplete quarter)

# Segment Analysis

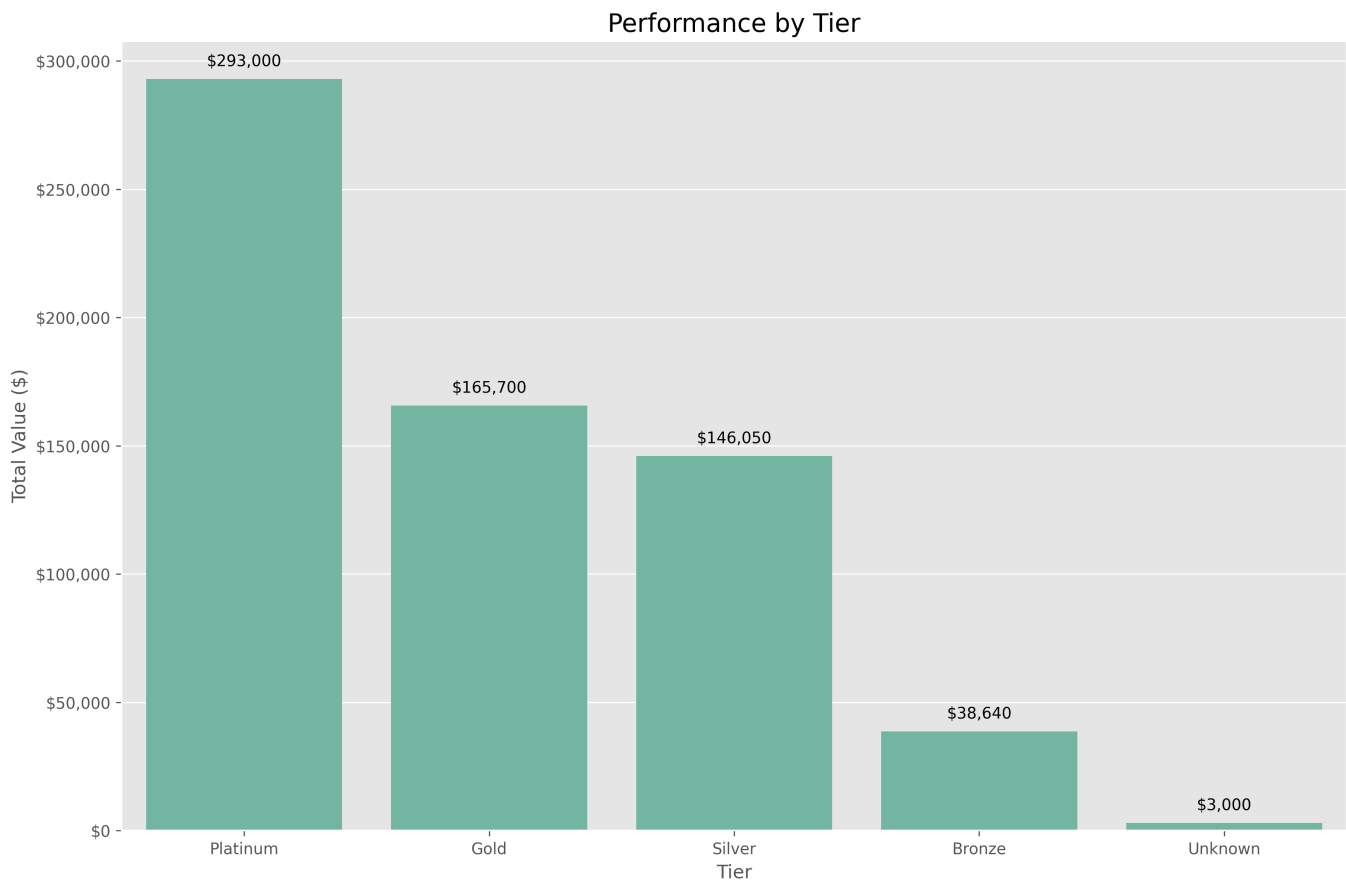
## By Deal Size



**Deal Size Breakdown:** - **Large (\$5K-\$10K):** \$401,000.00 (43 deals) - **Medium (\$1K-\$5K):** \$190,800.00 (80 deals) - **Small (<\$1K):** \$54,590.00 (89 deals) - **Enterprise (>\$10K):** \$0.00 (0 deals)

**Key Insight:** While large deals represent only 20% of the deal count, they account for 62% of the total pipeline value.

## By Tier



**Tier Performance:** - **Platinum:** \$293,000.00 (32 deals, avg. \$9,156.25) - **Gold:** \$165,700.00 (32 deals, avg. \$5,178.12) - **Silver:** \$146,050.00 (77 deals, avg. \$1,896.75) - **Bronze:** \$38,640.00 (68 deals, avg. \$568.24) - **Unknown:** \$3,000.00 (3 deals, avg. \$1,000.00)

## Key Insights and Recommendations

### Key Insights

- **Pipeline Health:** Substantial pipeline value (\$646,390.00) but concentrated in early stages
- **Conversion Challenge:** 0% win rate with 14 lost deals indicates conversion issues
- **Lead Source Effectiveness:** Fulfill, Matt Ratner, and Internal sources driving highest value
- **Deal Lead Concentration:** Heavy reliance on John Allen (84% of pipeline value)
- **Deal Size Strategy:** Large deals (\$5K-\$10K) drive the majority of pipeline value

## Recommendations

**1. Improve Conversion Rates:**

- 2. Implement structured follow-up process for Cold stage deals
- 3. Analyze lost deals to identify common failure points

**4. Diversify Deal Lead Portfolio:**

- 5. Reduce dependency on John Allen by developing additional sales talent
- 6. Create training program based on John Allen's successful approaches

**7. Optimize Lead Sources:**

- 8. Increase investment in top-performing sources (Fulfill, Matt Ratner)
- 9. Evaluate cost-effectiveness of lower-performing sources

**10. Focus on High-Value Segments:**

- 11. Prioritize Platinum and Gold tier opportunities
- 12. Develop strategies to convert more Medium deals to Large category

**13. Address Quarterly Fluctuations:**

- 14. Implement consistent pipeline building activities to smooth quarterly performance
- 15. Investigate factors behind strong Q2 2024 and Q1 2025 performance