

Sales Pipeline Executive Summary

Key Metrics

- **Total Pipeline Value:** \$646,390.00
- **Average Deal Size:** \$3,049.01
- **Win/Loss Ratio:** 0.00 (0 won, 14 lost)
- **Deal Count:** 212 deals across all stages
- **Pipeline Concentration:** 84% of value (\$543,590) managed by a single deal lead (John Allen)

Significant Sales Performance Findings

- **Lead Source Effectiveness:** Top 3 sources by value:
 - Fulfill: \$226,190 (77 deals)
 - Matt Ratner: \$176,000 (36 deals)
 - Internal: \$123,350 (58 deals)
- **Deal Size Impact:** Large deals (\$5K-\$10K) represent only 20% of deals but account for 62% of pipeline value (\$401,000)
- **Tier Performance:** Platinum tier deals average \$9,156 per deal, generating \$293,000 in pipeline value (45% of total)

Pipeline Status Insights

- **Early-Stage Heavy:** Majority of deals remain in early stages:
- Cold stage: 98 deals, \$267,000 (41% of pipeline value)
- Current Customer: 32 deals, \$116,950 (18% of pipeline value)
- **Conversion Challenges:** Poor progression from early stages with 0% win rate and 14 lost deals
- **Quarterly Fluctuations:** Strong performance in Q2 2024 (\$244,240) and Q1 2025 (\$231,750), with significant drops in Q3-Q4 2024

Top Recommendations

1. **Implement Structured Follow-up Process** for Cold stage deals to improve conversion rates and move \$267,000 through the pipeline
2. **Diversify Deal Lead Portfolio** to reduce 84% dependency on John Allen by developing additional sales talent
3. **Increase Investment in Top-Performing Lead Sources** (Fulfill, Matt Ratner) while evaluating cost-effectiveness of lower performers
4. **Prioritize High-Value Segments** by focusing on Platinum and Gold tier opportunities and developing strategies to convert Medium deals to Large category
5. **Address Quarterly Fluctuations** by implementing consistent pipeline building activities and investigating factors behind strong Q2 2024 and Q1 2025 performance