



# Capstone - RenderTribe

# 2018

*Shivam Sinha  
Ramanshu Dixit  
Yundong Su  
Mengyan Zhu  
Tazein Fatma*

# Contents

**01.** Context of the project

---

**02.** Problem Statement

---

**03.** Methodology

---

**04.** Findings

---

**05.** Further Development

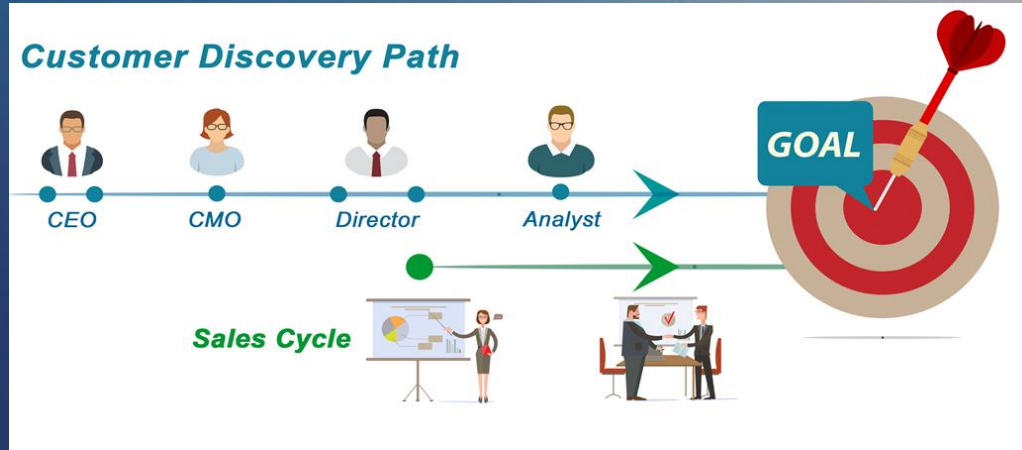
---

# 1 Context of the project

## 1.1 Context of the project



With shifting focus from lead generation to pipeline marketing, RenderTribe wants to develop an efficient lead scoring method for B2B landscape and enable alignment of customer discovery path to the goals. There is a need to establish correlation between marketing actions that occur during the sales pipeline and closing of a deal, so that sales can redirect resources to relevant accounts.



## 2 Problem Statement

### 2.1 Problem statement

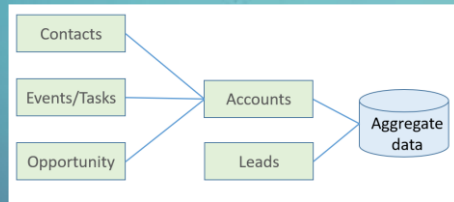
- Analyze the factors and figure out the top attributes correlated with creation of opportunities and deals being won.
- Analyze the importance of Contact's Titles in closing of a deal.
- Explore the option of predicting "opportunity-won" using past years data to predict for the next quarter.
- Make recommendation on the proper models used for marketing analysis

# 3 Methodology

## 3.1 Data cleaning

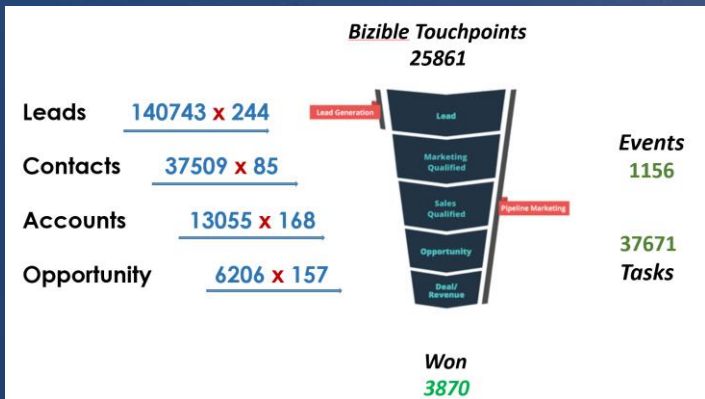
### Data Understanding:

- Relationship of Salesforce objects
- Breakdown of objects through sales pipeline



### Data Preparation:

- Aggregate data by organization level and quarter
- Capture the conversion from Leads, Contacts, Opportunity based on the basis of tasks/events.
- Apply fuzzy matching to extract a proper company name and reduce the redundancy



### 3 Methodology

## 3.2 Modeling

## Models:

- Logistics Regression
- Random forest
- Simple Exponential Smoothing Time series

## Tools:

[illegible][illegible][illegible]

# 4 Findings

## 4.1 Fuzzy matching

Number of Contacts are most significant in opportunity creation

---

Before Fuzzy Matching



After Fuzzy Matching

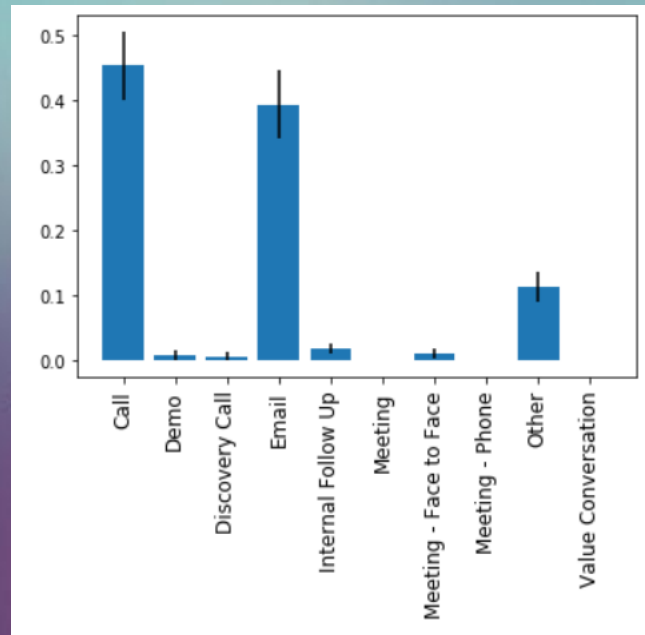


# 4 Findings

## 4.2 Event types

For opportunity to be won, Call and Email events are highly significant

Event Type	
1	Follow Up Conversation
2	Meeting - Phone
3	Discovery Call
4	Value Conversation
6	Follow Up Demo
8	Initial Demo
9	Call
10	In-Person Meeting
11	Email
12	Venture In-Person Meeting
13	Other



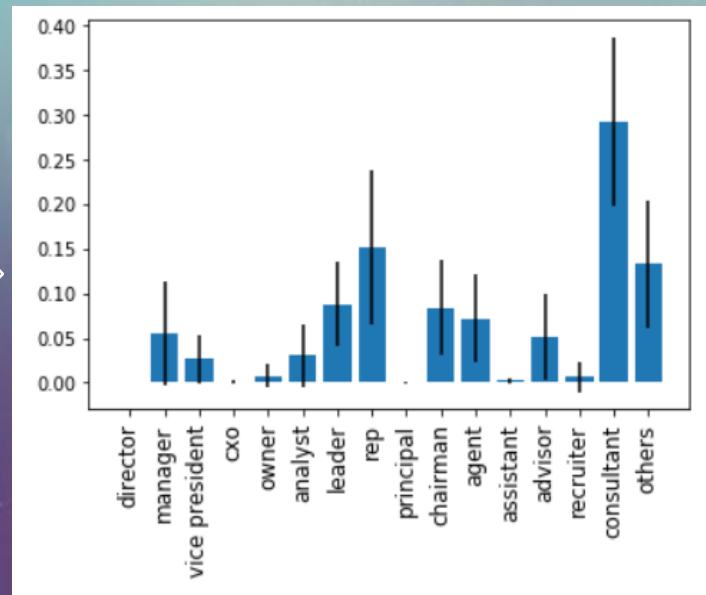


# 4 Findings

## 4.3 Title rank

For opportunity to be won,  
top 5 important titles are: Consultant, Rep, Leader, Chairman, and Agent

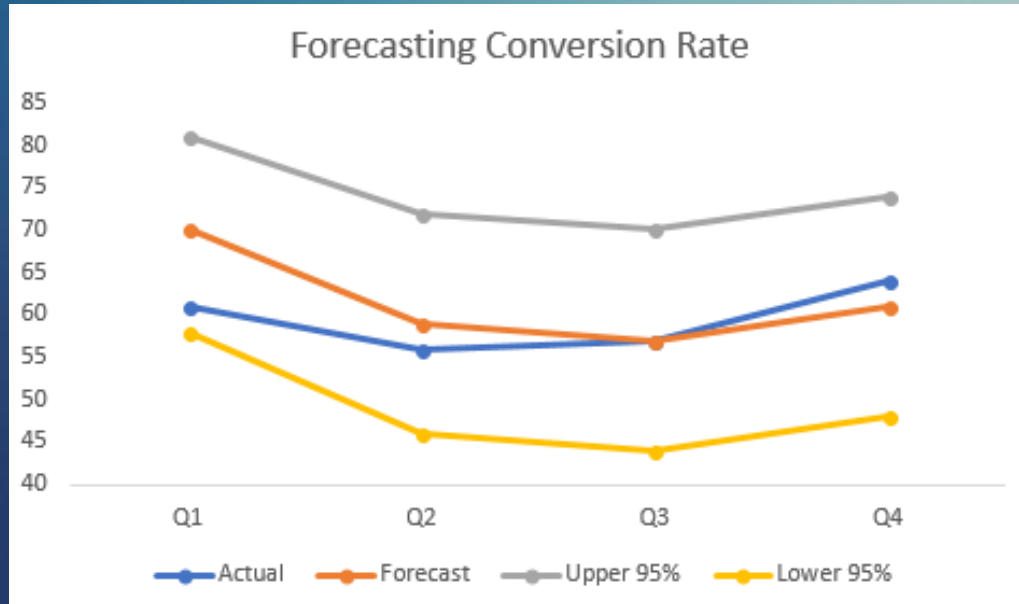
Title Type	
1	Director
2	Manager
3	Vice president
4	Cxo
5	Owner
6	Analyst
7	Leader
8	Rep
9	Principal
10	Chairman
11	Agent
12	Assistant
13	Advisor
14	Recruiter
15	Consultant
16	Others



## 4 Findings

### 4.4 Opportunity prediction

#### Forecasting 2017 Opportunity Conversion rate using 2015-2016 data

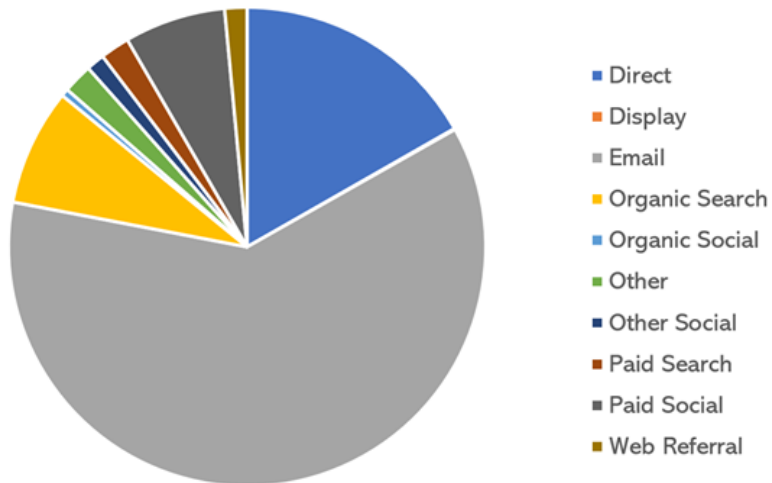


# 4 Findings

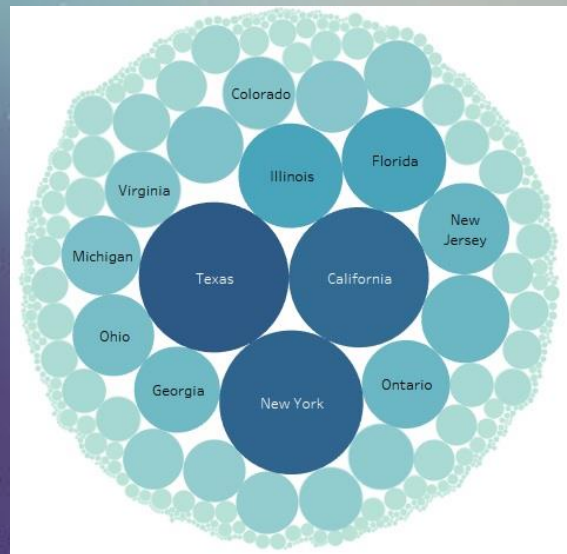
## 4.5 Bizible table

### Data exploration for Bizible table

#### Bizible Marketing Channel Breakdown



#### Bizible Lead count creation by States



# 5 Further Development

## 5.1 Further development



# 2018

---

**Thanks for watching!**

---