# Title: Deal insights - May 2019

| **Aspirations - Q[2] 2019 - mid quarter update** Deal insights, Freddy Freshsales, 21/05/2019 |
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| Mission: To provide sales intelligence to improve the productivity of sales people. |

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| --- | --- |
| **Squad/Team-name** | **Name** |
| Freddy Freshsales | Sarthak Dev |
| Freddy Freshsales | Jagadeesh Rajarajan |
| Freddy Freshsales | Sai charan |
| Freshsales Engineering | Sivalingam |
| Freshsales Engineering | Mudhabir |
| Freshsales UX | Pawan |
| Freshsales UX | Arun |
| Freshsales - Devops | Madhav |
| Freshsales - Devops | Sivakumar |
| Freddy Freshsales | Swaminathan |
| Freshsales Engineering | Sudharshan |
| Freshsales - Product | Aditi |
| Freshsales - Product | Srivatsan |
| Freshsales Engineering | Ajeet |
| Freshsales - QA | Logesh |

## **Success metrics - KPIs (Key Performance Indicators)**

|  |  |  |  |
| --- | --- | --- | --- |
| # | Goal Area | Features | Metrics |
| 2 | Pipeline Management | * **(Q1)** To automatically categorize open deals into one of four states (Likely to win, Trending upwards, Trending downwards, and Stale) * **(Q1)**To surface significant insights/events from the deal lifetime, which explain the aforesaid categorization | **Revenue attainment and agent productivity**  Forecasting accuracy (based on deal predictions)    Offline metrics/metrics from beta experiments: |

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|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| account\_id | name | no\_of\_deals | no\_of\_closed\_deals | no\_of\_paid\_wins | no\_of\_open\_deals | win\_rate | Accuracy |
| 19338 | Snappr | 84715 | 33555 | 5263 | 51160 | 15.7% | 87.27% |
| 70700 | Shaw Academy | 64719 | 43681 | 2452 | 21038 | 5.6% | 96.85% |
| 32335 | Web Africa Networks | 34187 | 32164 | 11330 | 2023 | 35.2% | 78.13% |
| 104996 | Profitcoins | 33130 | 2959 | 2328 | 30171 | 78.7% | 98.99% |
| 30425 | Byond Travel | 26840 | 12229 | 179 | 14611 | 1.5% | 86.68% |
| 35168 | Amberstudent | 19579 | 17324 | 785 | 2255 | 4.5% | 79.77% |
| 34715 | Fluentbe Sp. z o.o. | 16265 | 15265 | 1572 | 1000 | 10.3% | 86.50% |

## **Previous Aspirations Link:**[Deal insights - March 2019](https://confluence.freshworks.com/pages/viewpage.action?pageId=210018715)

## **Quarterly Goals & Progress:**

| Goals | Status | Comments |
| --- | --- | --- |
| Freeze the contract and give access to data through slave | DONE |  |
| UI for Deal insights | DONE |  |
| Deploy v1 for internal account on Production | DONE (Beta in progress) | We are currently working on activating for the rest of the beta customers |
| Make interpretability available for all TAGS | DONE |  |
| Deal insights and scores for all eligible customers | DONE |  |
| Lead insights for all eligible customers | POC | This is an extension of deal insights model to lead level. We are able to score leads as well using the models we had created. |

## **Learnings**

| Item | Description | Impact | Comments |
| --- | --- | --- | --- |
| Interpretability for TAGS | We are providing explanations for each predictions. Interpretability of the predictions are challenging since we have to make it easy to understand for sales audience. The actual model takes in to 200+ features. To be able explain the predictions with just 1 Feature/Signal is a significant challenge given to us. | One of the hardest things to accomplish in a data science feature which is as complex as sales predictions. Each company has a different data pattern, sales cycle and workflows. |  |

## **Sample Interpretability** (for Likely to WIN)**:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| From start of deal to current state  vs.  Historical start of a deal to current state | Emails replied | <Account>'s email replies are <x> times more than what you usually get from customers. | 6.87 | Sotheby's email replies are 7 times more than what you usually get from customers. |
| Emails sent | Your email follow-ups with <Account> are <x> times more than what you usually have with customers. | 2.65 | Your email follow-ups with Sotheby’s are 3 times more than what you usually have with customers. |
| Email follow-ups by sales agent | Your email follow-ups with <Account> are <x> times more than what you usually have with customers. | 5.44 | Your email follow-ups with Sotheby’s are 5 times more than what you usually have with customers. |
| Response rate | <Account> responded <x> times faster than how customers usually respond to your emails. | 4.44 | Sotheby's responded 4 times faster than how customers usually respond to your emails. |
| Calls made | Your phone conversations with <Account> are <x> times more than what you usually have with customers. | 1.48 | Your phone conversations with Sotheby’s are 1.5 times more than what you usually have with customers. |
| Calls received | <Account>'s phone conversations with you are <x> times more than what you usually have with customers. | 3.29 | Sotheby's phone conversations with you are 3 times more than what you usually have with customers. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Increase in # of activities in the recent n days | Emails replied | <Account>'s email replies are <#>x more than what you usually get from customers. | 8.46 | Sotheby's email replies are 8.5x more than what you usually get from customers. |
| Emails sent | Your email follow-ups with <Account> are <#>x more than what you usually have with customers. | 3.16 | Your email follow-ups with Sotheby's are 3x more than what you usually have with customers. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Increase in # of activities per day | Emails replied  Email sent  Calls received  Calls made | <Account>'s email replies are <#>x more than what you usually get from customers.  Your email follow-ups with <Account> are <#>x more than what you usually have with customers.  <Account>'s phone conversations with you are <#>x more than what you usually have with customers.  Your phone conversations with <Account> are <#>x more than what you usually have with customers. | 1.52 | Sotheby's email replies are 1.5x more than what you usually get from customers.  Your email follow-ups with Sotheby's are 1.5x more than what you usually have with customers.  Sotheby's phone conversations with you are 1.5x more than what you usually have with customers.  Your phone conversations with Sotheby's are 1.5x more than what you usually have with customers. |