# Title: Lead & Deal insights - July 2019

![](data:text/html;base64,)

| **Aspirations - Q[2] 2019 - end of quarter update** Deal insights, Freddy Freshsales,  09/07/2019 |
| --- |
| Mission: To provide sales intelligence to improve the productivity of sales people. |

|  |  |
| --- | --- |
| **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 Murugan |
| Freshsales - Devops | Madhav |
| Freshsales - Devops | Sivakumar |
| Freddy Freshsales | Swaminathan |
| Freshsales Engineering | Sudharshan |
| Freshsales - Product | Aditi |
| Freshsales - Product | Srivatsan |
| Freshsales Engineering | Venkata Surya teja |
| Freshsales - QA | Logesh |

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

|  |  |  |  |
| --- | --- | --- | --- |
| # | Goal Area | Features | Metrics |
| 1 | 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 | **Sales velocity and agent productivity**  Forecasting accuracy (based on deal predictions)  Accuracy of Predictions  Offline metrics/metrics from beta experiments: |

## 

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 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 - May 2019**](https://confluence.freshworks.com/pages/viewpage.action?pageId=218071420)

## **Quarterly Goals & Progress:**

| Goals | Status | Comments |
| --- | --- | --- |
| Deploy v1 on Production for internal account | DONE | Activated for Canary. |
| Deploy v1 for Beta Customers | IN PROGRESS | In the process of activating for other beta customers. |
| Monitoring predictions (NewRelic) | IN PROGRESS | Looking at this and the next week to deploy in production |

## **Next Quarter Goals**

| Goals |
| --- |
| Activating Deal Insights for all eligible Freshsales customers |
| Automating Deal Insight engineering workflow using AWS Sagemaker |
| Lead Insights |

## **Learnings**

| Item | Description | Impact | Comments |
| --- | --- | --- | --- |
| Interpretability for TAGS (text changes) |  |  |  |
| Showing all deals in Freddy View |  |  |  |
| Next Best Action |  |  |  |