


1. Executive Summary

This project focuses on optimizing the **Sales Cycle Length** by identifying bottlenecks in the conversion process. I developed a tracking system to measure the time elapsed from lead creation to closing, allowing for data-driven interventions in slow-moving deals.


2. The Problem

Without a clear visibility of the **Days to Close**, sales teams often focus on deals based on intuition rather than efficiency. This leads to "stagnant" deals that consume resources without providing immediate liquidity, affecting the overall pipeline velocity.

3. The Solution

Deal Name	Account	Value	Create Date	Close Date	Days to Close	Stage	Pipeline Velocity
Cloud Upgrade	Tech Corp	5000	1/1/2026	20/1/2026	19	Closed Won	On Track
Security Pack	Global Soft	3000	5/2/2026	15/2/2026	41	Closed Lost	 SLOW MOVING
License Mod	Innova Ltd	1200	10/1/2026	12/1/2026	2	Closed Won	On Track

I built an automated Sales Pipeline Tracker in Excel featuring:

- **Velocity Calculation:** Automated delta between **Create Date** and **Close Date** to determine the exact duration of each sale.
- **Efficiency Logic:** A business rule that flags any deal exceeding a 30-day threshold as " **SLOW MOVING**".
- **Status Monitoring:** Real-time classification of deals into "On Track" or "Slow Moving" to prioritize managerial review.

4. Key Metrics & Results

- **Performance Identification:** Successfully identified that high-value deals like **Cloud Upgrade (5,000)** close efficiently in 19 days.
- **Bottleneck Detection:** Flagged **Global Soft** as a critical outlier with a 41-day cycle, providing the Sales Ops team with clear evidence to investigate delays.
- **Operational Agility:** Improved decision-making speed by providing an at-a-glance status of the entire pipeline.

5. Technical Skills Demonstrated

- **Advanced Data Management:** Date-based calculations and logical nesting (IF functions).
- **KPI Development:** Designing metrics that measure time-to-revenue (Pipeline Velocity).
- **Strategic Reporting:** Converting raw operational data into actionable business alerts.