

## 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	<span style="color: orange;">⚠ SLOW MOVING</span>
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.