DT Fellowship Simulation Assignment

"Growth by Data: Orchestrating Funnels, Reducing CAC"

A test of systems thinking. A test of insight. A test of growth mindset

To the Candidate: *You're not applying for a job. You're applying to become a builder of India's 2047 vision — a systems thinker, a CEO-in-the-making, someone who brings order to the chaos of business operations through sharp reasoning, relentless iteration, and an obsession with outcomes.*

This isn't about being good with spreadsheets. This is about becoming the person a Founder calls when revenue growth stalls or CAC explodes. ***This is your simulation. Prove you can be that person.***

The Problem | Optimizing LTV/CAC

Pipeline ≠ Progress: Architect the Funnel That Actually Converts
A simulation in thinking like a Growth Partner, not a CRM operator.

You're working with an MSME — a well-run services or product business with ₹1–5 crore annual revenue. They've built a loyal customer base over the years through word-of-mouth, referrals, and founder-led sales.

Now, they want to grow. So they're spending on ads, LinkedIn outreach, and cold emails. But something's broken:

- Hundreds of leads are coming in — but no one knows which ones are good.
- Some get follow-up. Most fall through the cracks.
- The founder is frustrated. CAC is rising. Closures are erratic.
- Sales and marketing are pointing fingers. Everyone's working hard — but there's no system.
- A CRM exists. But it's just a contact dump. No stages. No funnel logic. No insights.

You are the **Data Champion**.

You've been brought in to build **order in the chaos** — to set up a CRM, define funnel qualification logic, nurture leads effectively, and generate insights that reduce CAC and improve conversion.

This is not a job for a data monkey.
This is a job for a future GTM leader.

Your work will:

- Help the business understand who to chase — and who to disqualify
- Make marketing and sales speak the same language
- Create visibility for the founder into what's working
- Cut waste. Improve ROI. Accelerate growth.

Who This Is For

This is not for job seekers. This is for builders of Bharat.
DT has the vision of seeing India as a developed nation by 2047, every DT Fellow as a CEO in 2047!

If you see yourself as a CEO by 2047 —
If you read dashboards not as metrics, but as **decisions waiting to be made** —
If you believe leadership isn't a position, but a practice of reflection and resolve —

Then don't treat this like a task.
Treat it like your declaration.

Your Assignment

Part 1: Funnel Design + CRM Structuring

1. Funnel Design Simulation

You are tasked with designing the company's sales funnel.

For a B2B SaaS product with a sales cycle of 4–6 weeks, define:
What counts as:

- **Lead**
- **MQL (Marketing Qualified Lead)**
- **SQL (Sales Qualified Lead)**
- **Customer**

What criteria or activities upgrade a lead to the next stage?
Which department owns each transition (e.g., Marketing → Sales → CS)?
Bonus: Add one extra funnel stage (optional) that you believe will make the system more effective — explain your logic.

2. CRM Configuration Blueprint

Your CEO wants to set up HubSpot, Zoho, or a Notion-based CRM.

Define:

- The **core data fields** you'll track per contact (e.g., Lead Source, Industry, Last Engagement Date)
- The **automations** you would set up (e.g., auto-tagging, lifecycle stage updates, reminders)
- The **dashboard views** you'd configure for:
    - Sales Reps
    - Growth Manager
    - CEO

Part 2: Nurturing Mechanism Design

The leads are cold and go dark. The CEO is frustrated.
Your job: Design **3 nurturing tracks** based on lead intent level:

1. **High-Intent Lead:** Booked a demo but didn't convert
2. **Mid-Intent Lead:** Downloaded a resource or joined a webinar
3. **Low-Intent Lead:** Just subscribed to newsletter

For each, define:

- Frequency and channels (e.g., email, WhatsApp, LinkedIn)
- Type of content (e.g., case study, founder note, offer)
- Success metric (e.g., reply rate, demo booked, re-engagement)

Bonus: Mention what AI tools (if any) you'd use to personalize or scale nurturing.

Part 3: Funnel Analytics & CAC Optimization

Your goal: Cut CAC by 40% in the next quarter.
You're given the following mock data (or create your own):

Stage	Leads	Cost Incurred	Conversions	Conversion Rate	Cost per Conversion
Facebook Ads	3000	₹90,000	30	1%	₹3,000
Email Campaign	1000	₹10,000	25	2.5%	₹400
LinkedIn DMs	500	₹25,000	10	2%	₹2,500

Answer:

- Which channel is underperforming? Why?
- Propose 2 experiments to improve conversion or reduce cost in the weak channel
- Suggest a **CAC:LTV tracking dashboard** — What metrics would you include? Who sees it weekly?

Part 4: Strategic Summary (Max 200 Words)

What's your philosophy when designing funnels?
How do you balance system design and real-world human unpredictability?
What role does **data storytelling** play in decision-making?

About AI Usage

You're welcome to use any AI (ChatGPT, Bard, etc.) for simulating CRM flows, drafting nurturing messages, or ideating automations.
But remember: *AI is only as smart as your mental model.*
This assignment tests your thought architecture, not your tooling.

Evaluation Rubric (Out of 100)

Category	Weight
Funnel & CRM Structuring Clarity	25
Nurturing Strategy Depth	20
Analytics Reasoning & CAC Thinking	25
Strategic Summary & Business Maturity	20
AI Prompting Awareness	10

Closing Note

"You can't improve what you don't define. You can't scale what you don't understand."
If this makes your heart beat faster — welcome.
You're the kind of person DT is building for India's future.