

DT Fellowship Simulation Assignment

Part 1: Funnel Design + CRM Structuring

1. Funnel Design Simulation - B2B SaaS Funnel (4-6 Week Sales Cycle)

| Funnel Stage | Definition | Criteria to Qualify | Owner |

|-----|-----|-----|-----|

| Lead | Any new contact generated from ads, email, events, referrals, etc. | Fills out form / signs up | Marketing |

| MQL (Marketing Qualified Lead) | Shows potential interest and fits ICP | Meets ICP (Industry, Size, Role) + Triggered activity (resource download, email opened, webinar attended) | Marketing |

| SQL (Sales Qualified Lead) | Engaged and shows buying intent | Booked a call/demo or replied positively | Sales |

| Opportunity (Bonus Stage) | Actively evaluating the product | Shared pain points, discussed pricing, involved multiple stakeholders | Sales |

| Customer | Deal closed and onboarded | Signed contract + Payment received | Sales -> Customer Success |

Bonus Stage "Opportunity" helps focus and prioritize high-quality leads.

2. CRM Configuration Blueprint

Platform: Zoho CRM (recommended for MSMEs)

Core Data Fields: Name, Company, Role, Contact Info, Lead Source, Industry, Company Size, Lead Score, Lifecycle Stage, Last Engagement Date, Deal Size, Owner

Automations: Auto-tagging, lifecycle stage update, inactivity reminders, lead scoring, Slack/email alerts

Dashboard Views:

- Sales Reps: Pipeline, engagement, reminders
- Growth Manager: Funnel %, CAC, A/B tests
- CEO: Weekly new leads, SQLs, CAC:LTV, bottlenecks

Part 2: Nurturing Mechanism Design

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High-Intent (Demo no-show):

- Channels: Email + WhatsApp (3 touches in 10 days)
- Content: Case studies, founder video, time-sensitive offer
- Success Metric: Demo rebook rate

Mid-Intent (Webinar/resource):

- Channels: Email + LinkedIn (weekly for 3 weeks)
- Content: Use-case guides, webinar replay, ROI calculator
- Metric: CTR, reply rate

Low-Intent (Newsletter):

- Channels: Bi-weekly Email
- Content: Blogs, founder notes, customer stories
- Metric: Open & click rate

AI Tools: ChatGPT (email drafts), Instantly.ai (sequences), Clearbit (data enrichment)

Part 3: Funnel Analytics & CAC Optimization

Performance Table:

- Facebook Ads: 3,000 CAC, 1% Conv.
- Email: 400 CAC, 2.5% Conv.
- LinkedIn: 2,500 CAC, 2% Conv.

Underperforming Channel: Facebook Ads

2 Experiments:

1. Use Lookalike audience of high-LTV customers
2. A/B test landing page messaging

CAC:LTV Dashboard:

- Metrics: CAC (by channel), LTV (segmented), CAC:LTV ratio, SQL Conv %, Retention
- Frequency: Weekly

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- Viewer: CEO, Sales, Growth

Part 4: Strategic Summary

Funnels aren't linear paths - they are decision systems. My philosophy is clarity, accountability, and learning loops.

To manage unpredictability, I use behavior-driven logic and adaptive systems. Automations should guide reps, not replace them.

Data storytelling is key - transforming raw data into actionable decisions. Dashboards must drive action, not just admiration.

Outcome: Higher ROI, smarter spend, and scalable systems.