



NAVIGATION

CY Pipeline Overview

SDR View

Opportunity View

SETTINGS

Select Year ▶

2023



Sales Pipeline Overview Dashboard | 2023

Opportunities
1,159

+72.0% vs PY (674)

Closed Opportunities
40

+29.0% vs PY (31)

Gross Pipeline
£7.03M

+113.8% vs PY (£3.29M)

Avg. Deal Size
£6,064

+24.4% vs PY (£4,877)

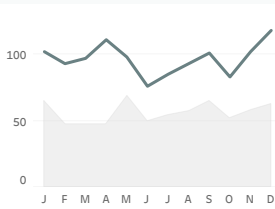
Weighted Pipeline
£1.72M

+154.3% vs PY (£0.68M)

Closed Pipeline
£0.09M

-33.4% vs PY (£0.13M)

Opportunities by Close Date
2023 vs PY



Pipeline by Stage

Select a Stage to Filter Dashboard

0. Dormant	£0.0K	£852.5K	0%
1. Pipeline Generation	£73.6K	£736.0K	10%
2. Discovery	£330.3K	£1,834.9K	18%
3. Scope	£93.2K	£372.9K	25%
4. Proposal	£487.7K	£1,434.3K	34%
5. Business Case	£63.0K	£131.2K	48%
6. Negotiate	£457.6K	£762.6K	60%
7. Closing	£130.1K	£153.1K	85%
8. Closed Won	£85.7K	£85.7K	100%

Pipeline by Industry

Select an Industry to Filter Dashboard

HealthTech	£214.5K	£1,147.3K	19%
Insurance	£332.7K	£1,113.7K	30%
Private Wealth Management	£149.0K	£859.3K	17%
Food and Beverage	£306.9K	£691.3K	44%
Financial Services	£114.0K	£574.4K	20%
Information Services	£71.5K	£361.8K	20%
EdTech	£100.6K	£359.5K	28%
Manufacturing	£67.1K	£359.4K	19%
Pharmaceuticals	£52.0K	£238.6K	22%
Real Estate	£46.4K	£201.1K	23%
Telecommunications	£33.2K	£181.0K	18%

Top 10 Opportunities

Opportunity Name	Stage	Sales Rep	Expected Close Date	Weighted Pipeline	Pipeline
Anderson Group	2. Discovery	Isabella Patel	10/11/2023	£186.6K	£1,036.4K 18%
Sanford-Kuhic	6. Negotiate	Isabella Patel	12/09/2023	£278.6K	£464.4K 60%
Lynch-Hagenes	4. Proposal	Amelia Bennett	24/10/2023	£96.6K	£284.2K 34%
Kunze and Sons	0. Dormant	Amelia Bennett	10/06/2023	£0.0K	£253.1K 0%