DT Fellowship Assignment: Growth by Data

Orchestrating Funnels, Reducing

Part 1: Funnel Design + CRM Structuring

1. Funnel Design Simulation

For a B2B SaaS product with a 4-6 week sales cycle, I define the following funnel stages:

Stage Definitions:

Lead

- **Definition**: Any contact who has expressed interest in our solution through identifiable action
- **Criteria**: Website form submission, content download, demo request, inbound inquiry, or outbound response
- **Owner**: Marketing

MQL (Marketing Qualified Lead)

- **Definition**: Lead who demonstrates buying intent and fits our ICP (Ideal Customer Profile)
- **Criteria**:
    - Completed lead scoring threshold (minimum 50 points)
    - Engaged with 2+ pieces of content in 14 days
    - Company size, budget, and authority indicators met
    - Demonstrated specific pain points our solution addresses
- **Owner**: Marketing → Sales handoff

SQL (Sales Qualified Lead)

- **Definition**: MQL validated by sales as having genuine need, budget, and decision-making authority
- **Criteria**:
    - Discovery call completed
    - BANT qualification confirmed (Budget, Authority, Need, Timeline)
    - Specific use case identified
    - Decision-making process mapped
- **Owner**: Sales

Customer

- **Definition**: SQL who has signed contract and completed onboarding
- **Criteria**: Contract signed, payment processed, initial setup completed
- **Owner**: Sales → Customer Success handoff

Bonus Stage: PQL (Product Qualified Lead)

- **Position**: Between MQL and SQL
- **Logic**: For SaaS products, trial/demo behavior is the strongest conversion predictor
- **Criteria**:
    - Active trial user for 7+ days
    - Completed key value actions (connected data, created reports, invited team members)
    - Engagement score above 70%
- **Owner**: Product → Sales collaboration
- **Why**: Bridges the gap between marketing interest and sales readiness, reducing time-to-close and improving qualification accuracy

2. CRM Configuration Blueprint

Core Data Fields Per Contact:

Identification

- Full Name, Email, Phone, Company, Title, LinkedIn Profile
- Lead Source (specific campaign/channel)
- UTM Parameters (campaign, medium, source)

Qualification

- Company Size (employees/revenue)
- Industry/Vertical
- Budget Range
- Decision Making Role
- Pain Points (categorized)
- Competitor Currently Using

Engagement Tracking

- Lead Score (dynamic)
- Lifecycle Stage
- Last Engagement Date
- Engagement Type (email, call, demo, content)
- Email Open/Click Rates
- Website Behavior Score

Sales Intelligence

- BANT Status (Budget, Authority, Need, Timeline)
- Decision Making Process
- Key Stakeholders
- Objections Raised
- Next Action Required
- Deal Value/Probability

Automations:

Lead Scoring Automation

- +15 points: Demo request
- +10 points: Pricing page visit
- +5 points: Email engagement
- +20 points: Multiple team members engaged

Lifecycle Stage Updates

- Auto-promote to MQL at 50+ lead score
- Auto-tag high-intent behaviors
- Auto-assign to sales rep based on territory/industry

Nurturing Triggers

- Auto-enroll in nurture sequence based on lead source
- Re-engagement campaigns for stalled leads
- Win-back sequences for churned prospects

Task & Reminder Automation

- Auto-create follow-up tasks post-demo
- Escalation alerts for stalled high-value deals
- Monthly account review reminders

Dashboard Views:

Sales Reps Dashboard

- My Pipeline (by stage, value, probability)
- Overdue Tasks & Follow-ups
- This Week's Activities
- Lead Score Changes
- Hot Leads (high engagement)

Growth Manager Dashboard

- Funnel Conversion Rates (by stage)
- Lead Sources Performance

- Cost Per Lead by Channel
- Lead Velocity (time between stages)
- Attribution Analysis

CEO Dashboard

- Revenue Pipeline & Forecast
- CAC vs LTV Trends
- Monthly Recurring Revenue (MRR)
- Churn Rate & Expansion Revenue
- Team Performance Metrics

Part 2: Nurturing Mechanism Design

High-Intent Lead Track (Booked demo but didn't convert)

Frequency: Every 3 days for 2 weeks, then weekly **Channels**: Email primary, LinkedIn secondary, WhatsApp for urgent follow-ups

Content Strategy:

- Day 1: Personalized video follow-up addressing demo concerns
- Day 4: Case study of similar company success story
- Day 7: Founder note on product roadmap alignment
- Day 10: Limited-time implementation discount offer
- Day 14: Competitor comparison showing unique advantages
- Weekly: Industry insights and thought leadership

Success Metrics:

- Reply rate >15%
- Demo rebook rate >25%
- Final conversion rate >8%

Mid-Intent Lead Track (Downloaded resource/joined webinar)

Frequency: Bi-weekly for 6 weeks, then monthly **Channels**: Email primary, LinkedIn for key prospects

Content Strategy:

- Week 1: Welcome sequence with related resources
- Week 2: Customer success story in their industry
- Week 3: Product demo video addressing common pain points
- Week 4: Invitation to exclusive webinar/roundtable
- Week 5: Free tool or template offering

- Week 6: Soft demo pitch with social proof

Success Metrics:

- Email open rate >25%
- Content engagement rate >12%
- Demo booking rate >5%

Low-Intent Lead Track (Newsletter subscribers)

Frequency: Weekly newsletter, monthly value-add content **Channels**: Email primary

Content Strategy:

- Weekly: Industry newsletter with curated insights
- Monthly: Deep-dive educational content
- Quarterly: Trend reports and benchmarking data
- Bi-annually: Product update and roadmap sharing

Success Metrics:

- Newsletter open rate >20%
- Monthly content engagement >8%
- Upgrade to higher intent >3%

AI Tools for Personalization:

1. **Clay.com**: For lead enrichment and personalized outreach
2. **Outreach.io**: For sequence automation and A/B testing
3. **Gong.ai**: For conversation intelligence and objection handling
4. **Drift**: For conversational marketing and lead qualification

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Part 3: Funnel Analytic & CAC Optimization

Channel Performance Analysis:

Channel	CAC	Quality Score	Verdict
Facebook Ads	₹3,000	Low (1% conversion)	**UNDERPERFORMING**
Email Campaign	₹400	High (2.5% conversion)	**STAR PERFORMER**
LinkedIn DMs	₹2,500	Medium (2% conversion)	**MODERATE**

Facebook Ads is critically under-performing due to:

- Highest CAC at ₹3,000
- Lowest conversion rate at 1%

- Poor lead quality (likely broad targeting)
- Potential creative fatigue

Optimization Experiments:

Facebook Ads Improvement:

Experiment 1: ICP-Focused Targeting

- **Hypothesis**: Current targeting is too broad, attracting low-intent leads
- **Action**:
  - Narrow audience to specific job titles, company sizes, and industries
  - Use lookalike audiences based on existing customers
  - Implement detailed interest and behavior targeting
- **Expected Impact**: 40% reduction in CAC, 2x conversion rate improvement

Experiment 2: Creative & Landing Page Optimization

- **Hypothesis**: Creative-landing page disconnect causing high drop-off
- **Action**:
  - A/B test video vs. static creative
  - Create dedicated landing pages for each ad set
  - Implement social proof and customer testimonials
  - Add exit-intent popups with alternative offers
- **Expected Impact**: 25% improvement in conversion rate

CAC:LTV Tracking Dashboard

Key Metrics:

Acquisition Metrics:

- CAC by Channel
- Cost per MQL/SQL
- Lead-to-Customer Conversion Rate
- Time to Conversion

Retention & Value Metrics:

- Customer Lifetime Value (LTV)
- LTV:CAC Ratio
- Monthly Churn Rate
- Net Revenue Retention

Predictive Metrics:

- Lead Velocity Rate
- Pipeline Health Score
- Forecast Accuracy
- Customer Health Score

Dashboard Access:

- **Weekly Review**: Growth Manager, Sales Manager
- **Monthly Review**: CEO, Marketing Head
- **Quarterly Review**: Board/Investors

Part 4: Strategic Summary

My Funnel Philosophy:

Systems Thinking Over Tactical Execution: I believe funnels are living systems that must balance mathematical precision with human psychology. Every stage transition should represent a meaningful qualification moment, not just arbitrary progress tracking.

Data-Driven Empathy: While numbers guide decisions, successful funnels acknowledge that B2B buying is emotional. I design processes that honor the human experience while maintaining systematic rigor.

Continuous Evolution: Market conditions, customer behavior, and competitive landscapes shift constantly. I build funnels for adaptability, not just efficiency.

Balancing System Design & Human Unpredictability:

I create structured frameworks with built-in flexibility. Systems provide consistency and scalability, but human touchpoints ensure authenticity. For example, while automation handles lead scoring and nurturing triggers, sales reps have discretion to accelerate or personalize based on individual prospect behavior.

Data Storytelling in Decision-Making:

Data storytelling transforms metrics into actionable insights. I don't just report "conversion rates dropped 15%"—I explain why (market seasonality, competitive pressure, or creative fatigue), what it means for revenue forecasting, and what specific actions will address the root cause. This approach ensures stakeholders understand both the "what" and the "why" behind performance changes.

The ultimate goal: Build predictable revenue engines that scale with human insight, not despite it.