# DT Fellowship Simulation Assignment Submission

## ROUND 2: Growth by Data – Funnel, CRM, CAC Optimization

### **PART 1: Funnel Design + CRM Structuring**

#### **1. Funnel Design Simulation**

**Funnel Stages:** - **Lead:** Any inbound who fills out a form, replies to a cold outreach, or gets added via event/contact list. - **MQL:** Engaged lead with defined business need (from form answers, reply indicating interest, or webinar attendance). - **SQL:** MQL who fits ICP (Ideal Customer Profile) and passes discovery call or sales readiness check. - **Customer:** Converted and paid user.

**Upgrade Criteria:** - **Lead → MQL:** Action-based. Downloaded e-book, responded to LinkedIn DM, attended webinar. - **MQL → SQL:** Fit-based. Company size, industry match, authority to buy. - **SQL → Customer:** Sales conversion. Demo booked, proposal accepted.

**Department Ownership:** - **Marketing:** Lead → MQL - **Sales:** MQL → SQL → Customer - **Customer Success (CS):** Post-conversion support

**Bonus Stage: PQL (Product Qualified Lead)** - Especially for SaaS with freemium or trial. - Definition: Actively using core feature (e.g., logged in 3+ times, used X feature) - Owned by: Product/Growth

#### **2. CRM Configuration Blueprint**

**Platform: HubSpot (recommendation)**

**Core Data Fields:** - Contact Name - Company Name - Industry - Lead Source - Lifecycle Stage - Last Engagement Date - Product Interest - Notes from Discovery Call

**Automations:** - Auto-tagging by source (Facebook/LinkedIn/email) - Lifecycle stage updates based on interaction - Reminder sequences (e.g., follow-up after demo) - Engagement scoring

**Dashboard Views:** - **Sales Reps:** Today’s tasks, open SQLs, follow-up overdue - **Growth Manager:** Lead source ROI, MQL→SQL rates, funnel health - **CEO:** Total leads, CAC trend, conversion rates by channel

### **PART 2: Nurturing Mechanism Design**

#### **1. High-Intent Lead: Booked Demo but Didn’t Convert**

* **Frequency:** 3-5 follow-ups over 2 weeks
* **Channels:** Email + WhatsApp (if permission)
* **Content:** Personalized founder note, product ROI calculator, social proof
* **Success Metric:** Rebooked demo, response rate

#### **2. Mid-Intent Lead: Webinar Attendee**

* **Frequency:** 1/week for 4 weeks
* **Channels:** Email
* **Content:** Case studies, industry-specific tips, replay recording, gentle CTA
* **Success Metric:** CTR, MQL upgrade

#### **3. Low-Intent Lead: Newsletter Subscriber**

* **Frequency:** 1 biweekly email
* **Channels:** Email only
* **Content:** Blog roundup, company story, soft CTA to download resource
* **Success Metric:** Open + click rate

**AI Tools Used:** - **ChatGPT / Jasper:** Draft nurture emails with tone/style tweaking - **Lemlist / Instantly.ai:** For automated personalization at scale

### **PART 3: Funnel Analytics & CAC Optimization**

#### Given Data:

| Channel | Leads | Cost Incurred | Conversions | Conversion Rate | Cost/Conversion |
| --- | --- | --- | --- | --- | --- |
| Facebook Ads | 3000 | ₹90,000 | 30 | 1% | ₹3,000 |
| Email | 1000 | ₹10,000 | 25 | 2.5% | ₹400 |
| LinkedIn DMs | 500 | ₹25,000 | 10 | 2% | ₹2,500 |

#### Underperforming Channel:

* **Facebook Ads** (Lowest conversion rate and highest CAC)

#### 2 Experiments:

1. **Landing Page A/B Test**: Test 3 versions with better ICP targeting and testimonials
2. **Lead Magnet Swap:** Use ROI calculator or industry case study instead of generic form

#### Suggested CAC:LTV Dashboard:

**Metrics:** - CAC per source - LTV per cohort - CAC:LTV Ratio - Payback Period - Funnel drop-off per stage

**Who Sees It Weekly:** - Growth Manager, CEO, Sales Head