CRM Data Champion Assignment

This assignment is based on my understanding of CRM systems, sales funnels, and basic growth analytics, and reflects how I would approach structuring and optimizing a sales process for a growing B2B SaaS company.

Part 1: Funnel Design & CRM Structuring

1. Funnel Design Simulation

To bring structure to the company's sales process, I designed a clear and simple funnel for a B2B SaaS product with a 4–6 week sales cycle.

Lead

A Lead is any individual or company that shows initial interest in the product. This can happen through ads, website forms, LinkedIn outreach, or referrals. At this stage, the intent is low and information is limited.

MQL (Marketing Qualified Lead)

An MQL is a lead that matches the ideal customer profile. These leads belong to the right industry, company size, and have shown some engagement such as downloading a resource or attending a webinar.

SQL (Sales Qualified Lead)

An SQL is a lead that has been verified by the sales team. These leads have booked a demo, shown real interest, and meet basic criteria like budget and authority.

Customer

A Customer is a lead who has agreed to the proposal and completed the payment process.

Funnel Movement Criteria

Lead → MQL: Matches target industry, company size, and engages with marketing content

MQL → SQL: Demo booked, decision-maker involved, problem clearly identified

SQL → Customer: Proposal accepted and payment confirmed

Ownership of Funnel Stages

Marketing owns the movement from Lead to MQL. Sales owns the movement from MQL to SQL and conversion to Customer. Customer Success handles onboarding after purchase.

Additional Funnel Stage: Demo Completed

Adding a "Demo Completed" stage helps track interested prospects more accurately. It separates casual demo bookings from serious buyers and helps sales prioritize follow-ups.

2. CRM Configuration Blueprint

Core CRM Fields

Name

Email

Phone Number

Company Name

Industry

Lead Source

Funnel Stage

Deal Value

Last Contacted Date

Assigned Sales Owner

These fields help the team track lead quality, engagement, and deal progress clearly.

CRM Automations

Automatically assign new leads to sales representatives

Auto-update funnel stages based on actions like demo booking

Follow-up reminders if no action is taken within 48 hours

Automatic tagging of leads based on source

Dashboard Views

Sales Representative Dashboard

Assigned leads

Pending follow-ups

Active deals

Growth Manager Dashboard

Conversion rates at each funnel stage

Performance of different lead sources

Funnel drop-off points

CEO Dashboard

Overall revenue

Customer Acquisition Cost (CAC)

Funnel health overview

Part 2: Nurturing Mechanism Design

1. High-Intent Leads (Demo booked but not converted)

Channels: Email and WhatsApp

Frequency: 1–2 messages per week

Content: Case studies, demo recap, short founder message

Success Metric: Demo re-booked or direct response

2. Mid-Intent Leads (Webinar or resource download)

Channels: Email and LinkedIn

Frequency: Once per week

Content: Educational blogs, use cases, feature explanations

Success Metric: Demo bookings or website revisits

3. Low-Intent Leads (Newsletter subscribers)

Channels: Email

Frequency: Bi-weekly

Content: Founder stories, industry insights, product updates

Success Metric: Open rate and click-through rate

AI Usage

AI tools like ChatGPT can be used to personalize emails and generate subject lines, while CRM AI features can help with basic lead scoring.

Part 3: Funnel Analytics & CAC Optimization

Based on the given data, Facebook Ads appear to be underperforming. Although they bring in a high number of leads, the conversion rate is very low and the cost per conversion is the highest among all channels.

These conclusions are based on the given mock data and basic funnel analysis assumptions.

Proposed Experiments

Improve targeting by narrowing down industries and job roles to reduce irrelevant leads.

Optimize landing pages to clearly explain the product value and improve conversions.

CAC & LTV Tracking Dashboard

CAC by channel

Conversion rate at each funnel stage

Average deal value

Customer Lifetime Value (LTV)

Payback period

This dashboard should be reviewed weekly by the Growth Manager and CEO.

Part 4: Strategic Summary

When designing funnels, my focus is on clarity and simplicity. A funnel should help teams decide where to spend time and money, not confuse them with too many stages. While systems bring structure, human behavior is unpredictable, so regular follow-ups and personal communication remain important. Data helps identify patterns, but decisions should always consider real customer conversations. I believe data storytelling is important because numbers alone can be difficult to understand without proper context. When data is presented as a story, it helps founders and teams understand problems quickly and take better decisions. Clear data-driven insights allow businesses to grow efficiently while avoiding unnecessary costs.