SALES FUNNEL PERFORMANCE REVIEW

Bryce Smith - Excel + Power BI Workflow

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1. Cover & Executive Summary

Title
Sales Funnel Leak-Point & Efficiency Analysis

One-line Tagline
Excel-cleaned, Power BI-visualised deep dive into where deals stall and which channels win.

Problem Statement
Leadership requested a rapid diagnosis of funnel attrition, channel effectiveness, and sales-cycle efficiency-built entirely in Excel & Power BI-to prioritize coaching, budget shifts, and process fixes.

Key Metric Lift / $ Impact
63 % of proposals never close-raising close-rate by 10 pts adds ~60 wins per quarter.

Headline Insights
- Biggest leak: Proposal → Won (-63 %); late-stage enablement is #1 opportunity.
- Website traffic converts ~10 %->2× Partners and >3× Telesales.
- Deals aged > 60 days almost never win; ageing alerts will free 95-day “dead” inventory.

2. Business Context & Objectives

The company sells mid-market SaaS through a five-stage pipeline (Identified → Qualified → Proposal → Validated → Won/Lost). Marketing feeds Website, Partner, F2F and Telesales leads into CRM; Sales owns progression and close.

Why This Matters
Funnel friction wastes demand-gen spend and burns sales capacity. Tightening qualification, focusing on top channels, and eliminating zombie deals directly improve revenue and cost-per-acquisition.

SMART Objectives
- Cut Proposal-to-Won attrition from 63 % to ≤ 45 % within 6 months.

• Lift overall win rate from 8 % to ≥ 10 % by Q1 2026.
• Reduce average cycle time for active deals to ≤ 60 days by end-2025.

3. Data Overview

Item	Include Here
Source name & public link	CRM export “Leads_Deals_2025Q2.csv” (internal)
Time span & row/col counts	Q2 2024 – Q1 2025; 980 deals × 24 columns
Key joins / grain	One row per deal; stage history pivoted in Excel Power Query

(Detailed Power Query steps and screen captures live in Appendix A.)

4. Methodology

Analysis Pipeline
• *ETL in Excel* – Power Query imports CSV, normalises stage dates, and flags lead source.
• *Power BI Data Model* – DAX measures calculate stage drops, win rate, and cycle days.
• *Power BI Dashboards* – horizontal bar, column, and scatter visuals with slicers for channel/rep.
• *Validation* – KPIs cross-checked against CRM native reports; peer review of Power BI measures.

Modelling Techniques
Descriptive leakage & ageing metrics; next phase will add a logistic win-probability curve in DAX.

(The .pbix file and Excel workbook are linked in Appendix C.)

5. Findings & Visual Evidence

Q1. Where do leads drop out most?

Visual – Leads by Sales Stage

Stage Transition	Leads Before → After	Numeric Drop	% Drop
Proposal → Won	145 → 53	–92	**63 %**
Identified → Validated	355 → 226	–129	36 %
Qualified → Proposal	188 → 145	–43	23 %
Validated → Qualified*	226 → 188	–38	17 %

(*Reverse flow rows present in source.)

Insight: Over 60 % of late-stage proposals fail to close-late-stage enablement is the biggest lever.

So-what: Strengthen proposal QA, pricing approvals, and exec-sponsor engagement.

Q2. Which sources convert best?

Visual – Win Rate % by Sales Channel (Power BI bar chart)
Website ~10 % (★ top), Partners 6 %, F2F 4 %, Telesales 3 %.
So-what: Double down on Website optimisation & partner programmes; refresh telesales script.

Q3. How do reps stack up on speed vs. success?

Visual – Avg Cycle Days vs Win Rate % (Power BI scatter)
Star rep: 85 days / 15 % win; average cluster: 90 days / 5–7 %; quick-but-low cluster: 80 days / 3–4 %.
So-what: Capture star's playbook; coach laggards; set SLA triggers at 90 days.

Q4. Are stages taking too long?

Visual – Avg Cycle Days by Stage (Power BI column)
Middle stages each ~95 days; Won deals close in 38 days; Lost deals linger 95 days.
So-what: Introduce 60-day "no-progress" kill rule and redirect effort to fresh deals.

6. Recommendations & Impact

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1. **Late-Stage Enablement** – proposal QA checklist, pricing guard-rails, exec-sponsor outreach (Sales Ops, Jul 2025).

2. **Channel Re-allocation** – +30 % Website budget, nurture Partners, pause lowest-ROI Telesales (Marketing, Aug 2025).

3. **Ageing Alerts & Kill Criteria** – Power BI alerts flag deals > 60 days inactive (CRM Admin, Sep 2025).

4. **Rep Coaching** – shadow star rep, weekly win-loss clinics (Sales Enablement, Q3 2025).

5. **Predictive Win Score** – build DAX logistic model using ageing × stage (Data Analytics, Q4 2025).

Expected Lift & Caveats
Halving the Proposal leak (+46 wins/qtr) assumes pricing and sponsor engagement improve close-rate and Website scale holds.

Next-Steps Roadmap
Enablement sprint → Budget shift → Power BI alert build → 90-day KPI review.

7. Limitations & Assumptions

• One-quarter snapshot; seasonality not captured.
• Stage timestamps rely on manual rep entry-possible lag.
• Some lead source tags missing; “Unknown” excluded.
• Cycle-day averages sensitive to outlier mega-deals.

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8. Appendix

A. Data Acquisition & Cleaning
• Power Query steps with screenshots; data types & merge logic.

B. Excel / DAX Highlights
• Stage-transition calculations; ageing DAX measures.

C. Full Workbook & Power BI File
• SharePoint link: Slides Sales Funnel Performance Review

GitHub https://github.com/thebryce15/sales-funnel-performance

D. Glossary & KPI Definitions

- *Proposal* – formal pricing & scope sent.
- *Validated* – solution fit confirmed with buyer.
- *Cycle Days* – Identified → Won/Lost.