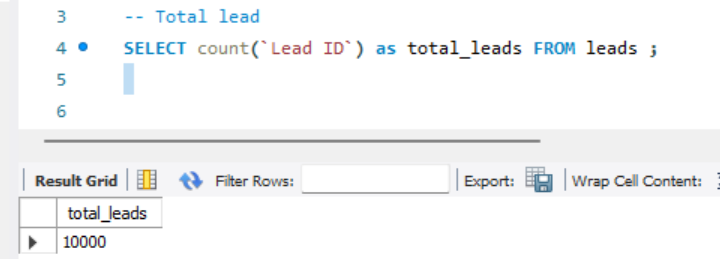
**CRM-ANALYTICS SQL REPORT**

**Lead KPI’s**

1. **Total Lead**

SELECT count(`Lead ID`) as total\_leads FROM leads ;



1. **Expected Amount from Converted Leads**

SELECT SUM(CAST(REPLACE(REPLACE(o.`Expected Amount`, ',', ''), '$', '') AS DECIMAL(20, 2))) AS Total\_Expected\_Amount\_Converted\_Leads

FROM opportuninty o

Right JOIN

Leads l ON o.`Opportunity ID` = l.`Converted Opportunity ID`

WHERE

l.`Converted` = 'True';

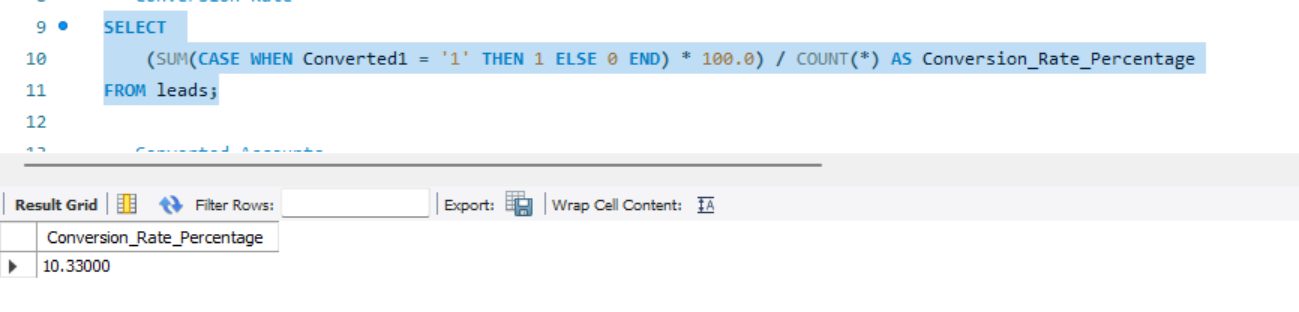


1. **Conversion Rate**

SELECT

(SUM(CASE WHEN Converted1 = '1' THEN 1 ELSE 0 END) \* 100.0) / COUNT(\*) AS Conversion\_Rate\_Percentage

FROM leads;

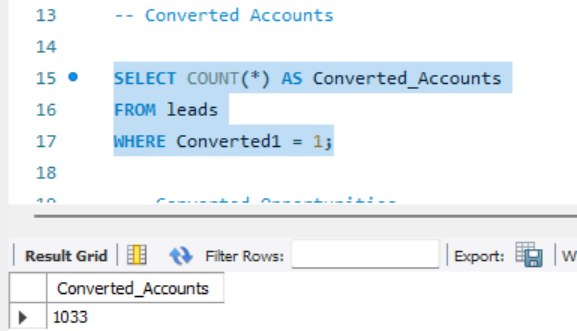


1. **Converted Accounts**

SELECT COUNT(\*) AS Converted\_Accounts

FROM leads

WHERE Converted1 = 1;

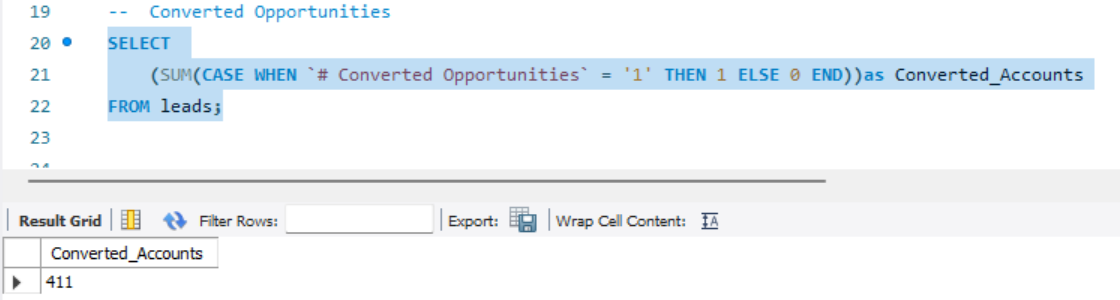


1. **Converted Opportunities**

SELECT

(SUM(CASE WHEN `# Converted Opportunities` = '1' THEN 1 ELSE 0 END))as Converted\_Accounts

FROM leads;



1. **Lead By Source**

SELECT Lead\_Source, COUNT('Total Leads') AS Lead\_Count

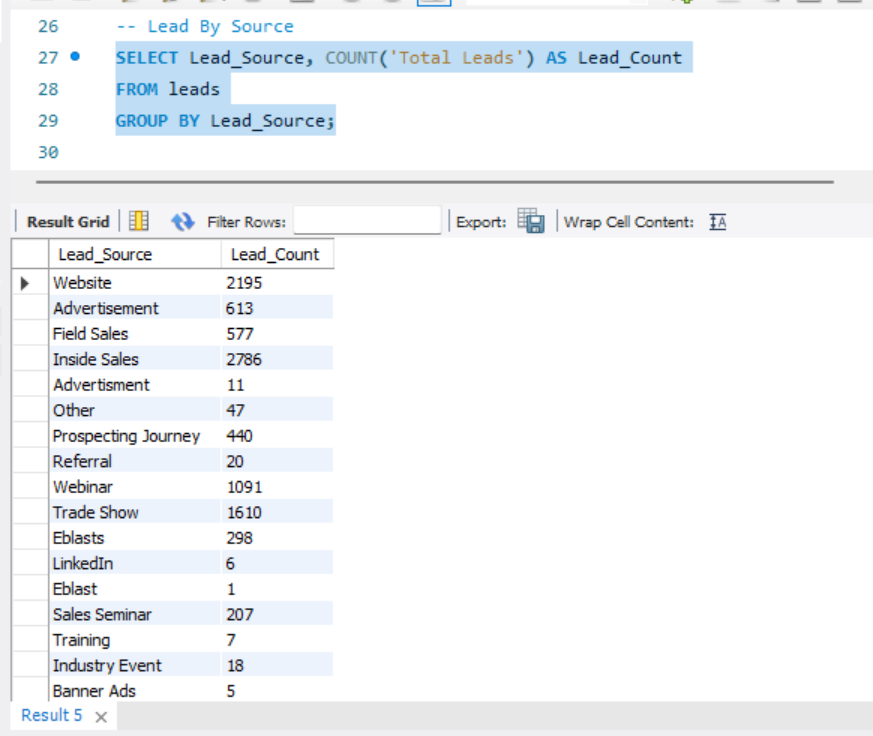
FROM leads

GROUP BY Lead\_Source;

-- change name

ALTER TABLE leads

CHANGE `Lead Source` Lead\_Source TEXT;

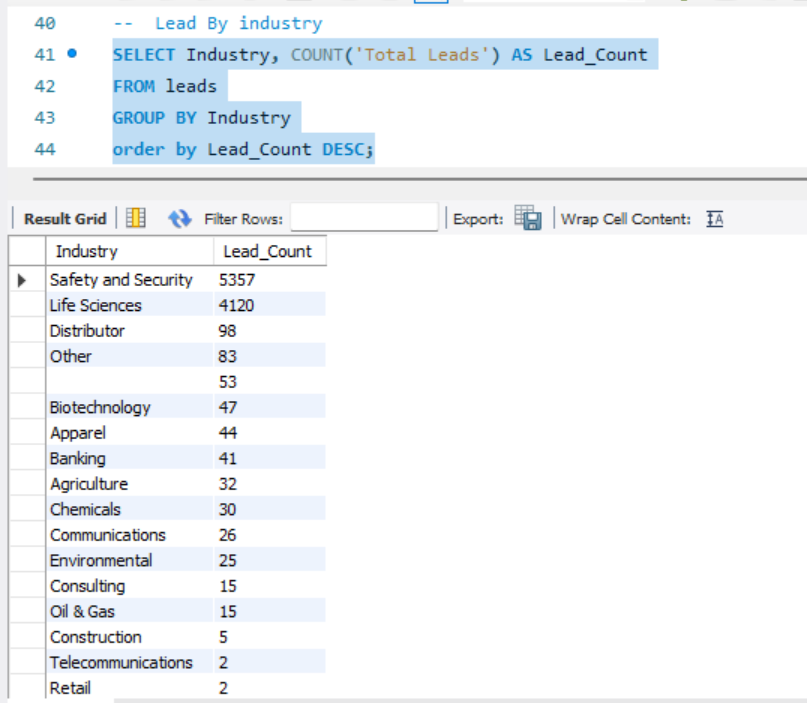


1. **Lead By industry**

SELECT Industry, COUNT('Total Leads') AS Lead\_Count

FROM leads

GROUP BY Industry

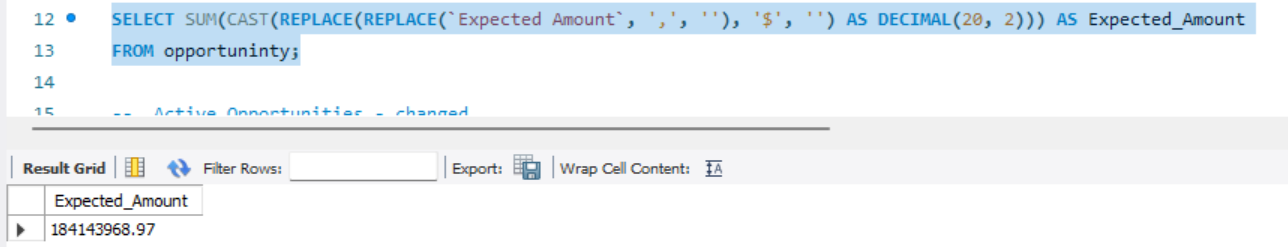
order by Lead\_Count DESC;  


**Opportunity KPI’s**

1. **Expected Amount**

SELECT SUM(CAST(REPLACE(REPLACE(`Expected Amount`, ',', ''), '$', '') AS DECIMAL(20, 2))) AS Expected\_Amount

FROM opportuninty;

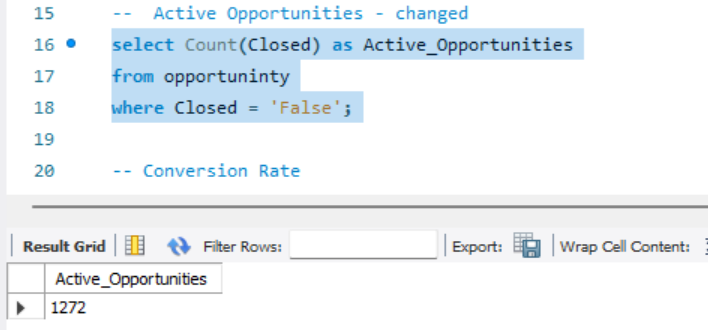


1. **Active Opportunities**

select Count(Closed) as Active\_Opportunities

from opportuninty

where Closed = 'False';

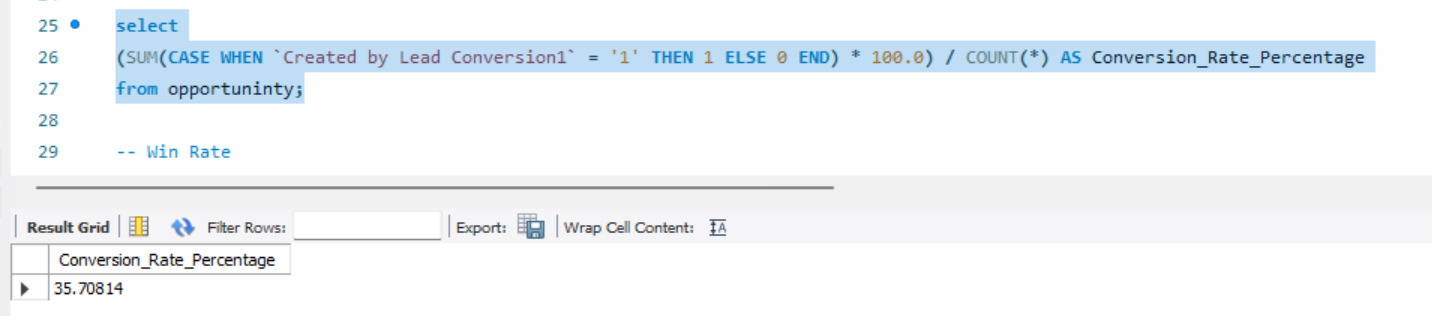


1. **Conversion Rate**

select

(SUM(CASE WHEN `Created by Lead Conversion1` = '1' THEN 1 ELSE 0 END) \* 100.0) / COUNT(\*) AS Conversion\_Rate\_Percentage

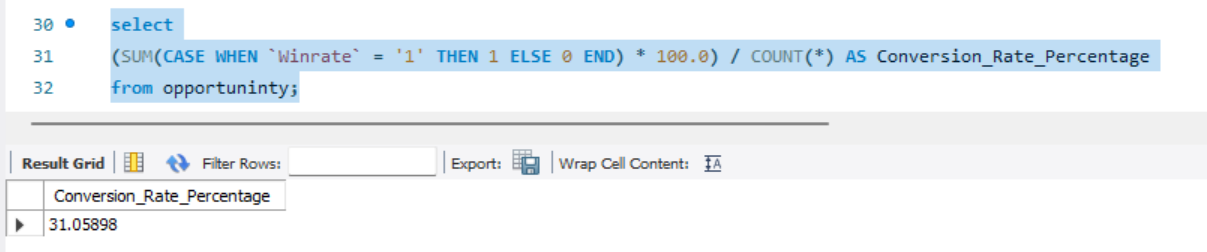
from opportuninty;



1. **Win Rate**

select

(SUM(CASE WHEN `Winrate` = '1' THEN 1 ELSE 0 END) \* 100.0) / COUNT(\*) AS Conversion\_Rate\_Percentage

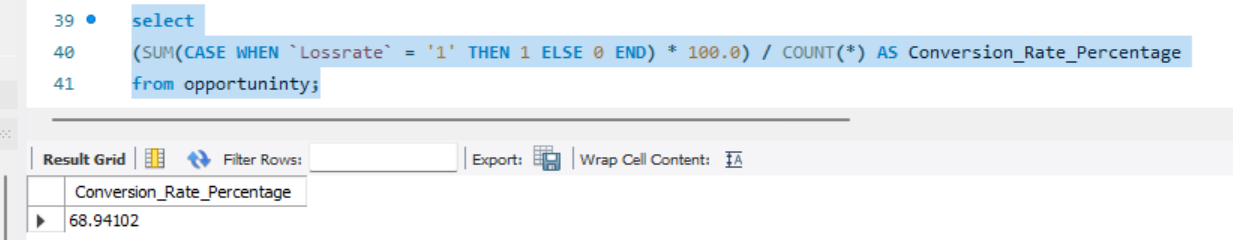
from opportuninty;  
  


1. **Loss**

select

(SUM(CASE WHEN `Lossrate` = '1' THEN 1 ELSE 0 END) \* 100.0) / COUNT(\*) AS Conversion\_Rate\_Percentage

from opportuninty;



**Trend Analysis**

1. **Running Total Expected Vs Commit Forecast Amount over Time**

SELECT

`Fiscal Year`,

`Expected Amount`,

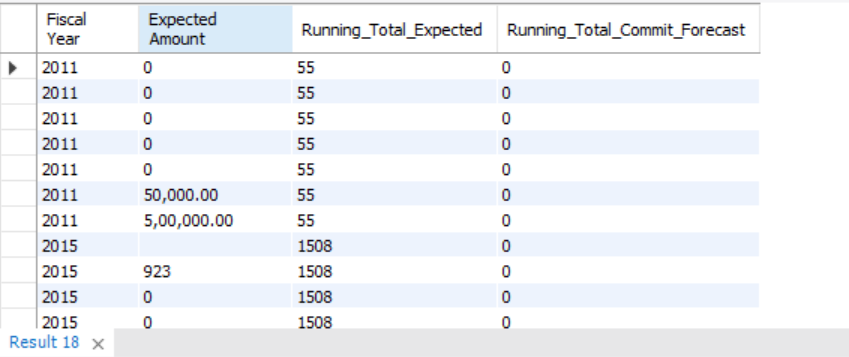
SUM(`Expected Amount`) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Expected,

SUM(`Forecast Q Commit1`) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Commit\_Forecast

FROM

opportuninty

ORDER BY

`Fiscal Year` ASC;  
  


1. **Running Total Active Vs Total Opportunities over Time**

SELECT

`Fiscal Year`,

COUNT(\*) AS Total\_Opportunities,

SUM(`Active Opp`) AS Active\_Opportunities,

SUM(COUNT(\*)) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Opportunities,

SUM(SUM(`Active Opp`)) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Active\_Opportunities

FROM

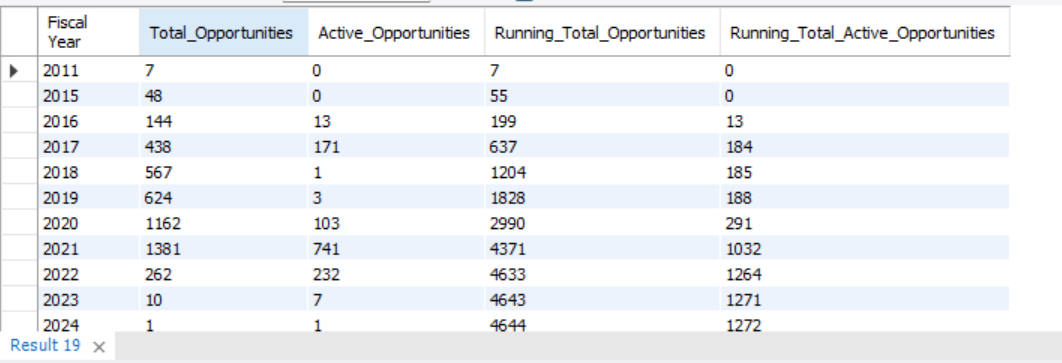
opportuninty

GROUP BY

`Fiscal Year`

ORDER BY

`Fiscal Year` ASC;



1. **Closed Won Vs Total Opportunities over Time**

SELECT

`Fiscal Year`,

COUNT(\*) AS Total\_Opportunities,

SUM(CASE WHEN `stage` = 'Closed Won' THEN 1 ELSE 0 END) AS Closed\_Won\_Opportunities,

SUM(COUNT(\*)) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Opportunities,

SUM(SUM(CASE WHEN `stage` = 'Closed Won' THEN 1 ELSE 0 END)) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Closed\_Won

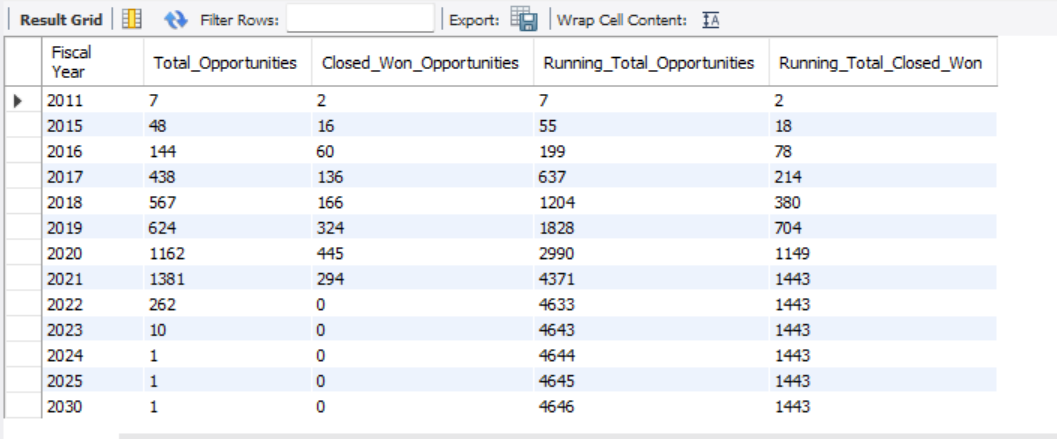
FROM

opportuninty

GROUP BY

`Fiscal Year`

ORDER BY

`Fiscal Year` ASC;  
  


1. **Closed Won vs Total Closed over Time**

SELECT

`Fiscal Year`,

SUM(CASE WHEN `Closed` = 'True' THEN 1 ELSE 0 END) AS Total\_Closed\_Opportunities,

SUM(CASE WHEN `Stage` = 'Closed Won' THEN 1 ELSE 0 END) AS Closed\_Won\_Opportunities,

SUM(SUM(CASE WHEN `Closed` = 'True' THEN 1 ELSE 0 END)) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Closed\_Opportunities,

SUM(SUM(CASE WHEN `Stage` = 'Closed Won' THEN 1 ELSE 0 END)) OVER (ORDER BY `Fiscal Year` ASC) AS Running\_Total\_Closed\_Won

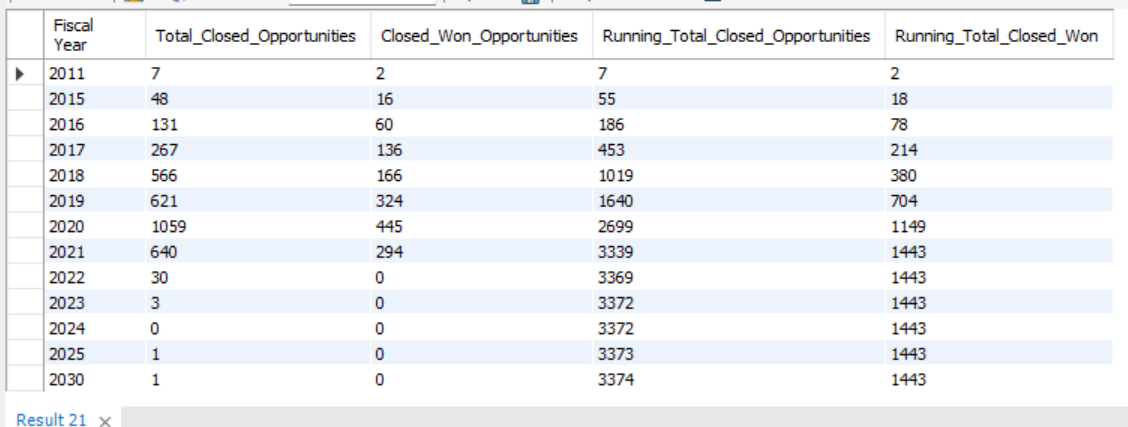
FROM

opportuninty

GROUP BY

`Fiscal Year`

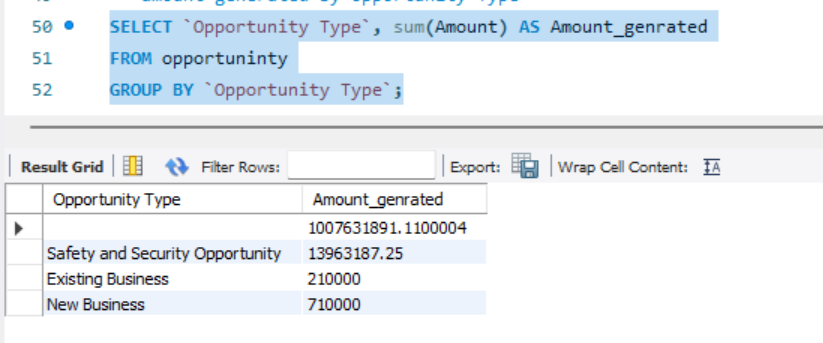
ORDER BY

`Fiscal Year` ASC;  
  


1. **Expected Amount by Opportunity Type**

SELECT `Opportunity Type`, sum(Amount) AS Amount\_genrated

FROM opportuninty

GROUP BY `Opportunity Type`;  
  


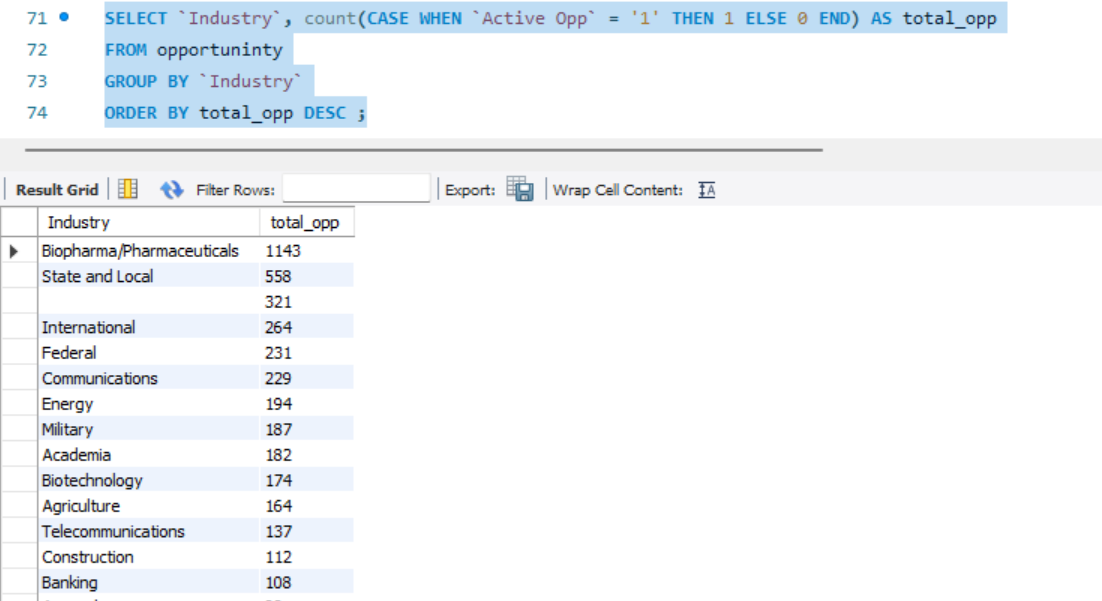
1. Opportunities by Industry

SELECT `Industry`, count(CASE WHEN `Active Opp` = '1' THEN 1 ELSE 0 END) AS total\_opp

FROM opportuninty

GROUP BY `Industry`

ORDER BY total\_opp DESC ;



**Additional Key point’s**

* **actual difference between expected amount and Actual amount**

SELECT

`Opportunity Type`,

SUM(`Expected Amount`) AS Expected\_Amount,

SUM(Amount) AS Amount\_generated,

SUM(`Expected Amount`) - SUM(Amount) AS difference

FROM

opportuninty

GROUP BY

`Opportunity Type`;  
  
