

Driving Sales Excellence Through Data:

An Analytical Approach to Pipeline Optimization and
Customer Retention

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The Sales Performance Puzzle: Challenges & Opportunities

Deal Success Drivers

Lead source, deal size, and sales stage durations shape outcomes.

Lost Deals & Churn

Root causes include pricing issues, product mismatch, and competition.

Pipeline Bottlenecks

Deal velocity and conversion rates need continuous improvement.

- Identifying the key factors that drive deal success
- Understanding why deals are lost
- Optimizing pipeline efficiency
- Predicting which customers might churn
- Uncovering the seasonal trends that can make or break our targets

Objective: What we set out to achieve

Analyze Sales Performance

Who are our top performers?
Which products and deals deliver the most value?

Understand Deal Success & Failure

What's driving wins and losses?
Where are we losing momentum?

Predict Churn Risk

Which accounts are waving red flags, and how can we act before it's too late?

Detect Seasonal Sales Trends:

When does revenue spike or dip—and why?

Enhance Decision-Making

Arm our team with actionable, data-driven insights for smarter strategies

SQL Query Showcase:

1. Top Sales agents closing most high value deals.

Results Messages			
	sales_agent	regional_office	High_Value_Deals
1	Anna Snelling	Central	109
2	Darcel Schlecht	Central	98
3	Kary Hendrixson	West	94
4	Versie Hillebrand	Central	91
5	Vicki Laflamme	West	89

2. Accounts having fastest and slowest pipeline velocity to identify bottlenecks
--sales pipeline velocity =
(number of opportunities * average deal size * win rate)/ average duration taken for sale

Fastest

Results Messages						
	account	number_of_opportunities	avg_deal_size	win_rate	avg_duration_days	pipeline_velocity
1	Kan-code	187	1825.96256684492	0.614973262032	47	4467.78
2	Konex	171	1574.53216374269	0.631578947368	43	3954.64
3	Goodsilron	88	2074.11363636364	0.738636363636	40	3370.43
4	Condax	159	1298.17610062893	0.660377358490	48	2839.76
5	Cheers	90	2200.22222222222	0.633333333333	46	2726.36

Slowest

Results Messages						
	account	number_of_opportunities	avg_deal_size	win_rate	avg_duration_days	pipeline_velocity
1	Golddex	58	890.206896551724	0.568965517241	52	564.94
2	Sumace	41	1461.09756097561	0.560975609756	51	658.93
3	Zathunicon	52	1069.53846153846	0.653846153846	54	673.41
4	Donware	54	1048.83333333333	0.555555555555	45	699.22
5	Bluth Company	48	1185.47916666667	0.583333333333	43	771.94

SQL Query Showcase:

1. Average Deal Closing Time by Industry

	sector	avg_days_to_close
1	entertainment	49
2	software	49
3	telecommunications	49
4	employment	48
5	retail	48
6	services	47
7	technology	47
8	finance	47
9	marketing	46
10	medical	46

	account	total_deals	lost_deals	last_won_date	days_since_last_win	lost_deal_percentage
1	Globex Corporation	91	35	2017-12-21	10	38.46
2	Fasehatice	85	32	2017-12-19	12	37.65
3	Ontomedia	59	22	2017-12-19	12	37.29
4	Funholding	109	40	2017-12-20	11	36.7
5	Xx-holding	87	31	2017-12-18	13	35.63

2. Identifying accounts with a high risk of churn by calculating the lost deal percentage and the time gap since their last won deal.

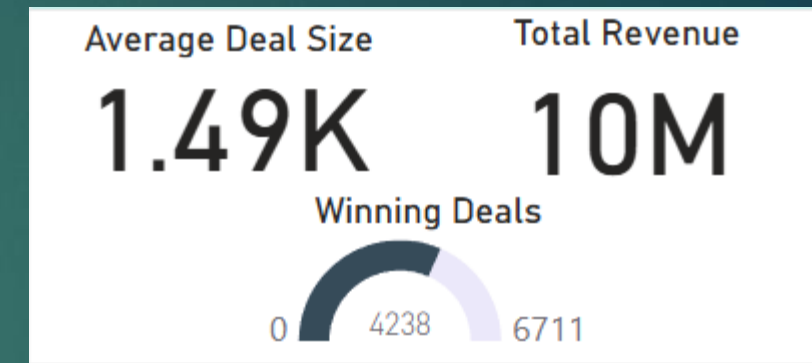
3. Sales Seasonality & Revenue Impact Analysis

	year	Month_name	monthly_revenue	previous_revenue	percentage_change
1	2017	March	1134672	NULL	0%
2	2017	April	721932	1134672	-36.38%
3	2017	May	1025713	721932	42.08%
4	2017	June	1338466	1025713	30.49%
5	2017	July	696932	1338466	-47.93%
6	2017	August	1050059	696932	50.67%
7	2017	September	1235264	1050059	17.64%
8	2017	October	731980	1235264	-40.74%
9	2017	November	938943	731980	28.27%
10	2017	December	1131573	938943	20.52%

Dashboard highlights

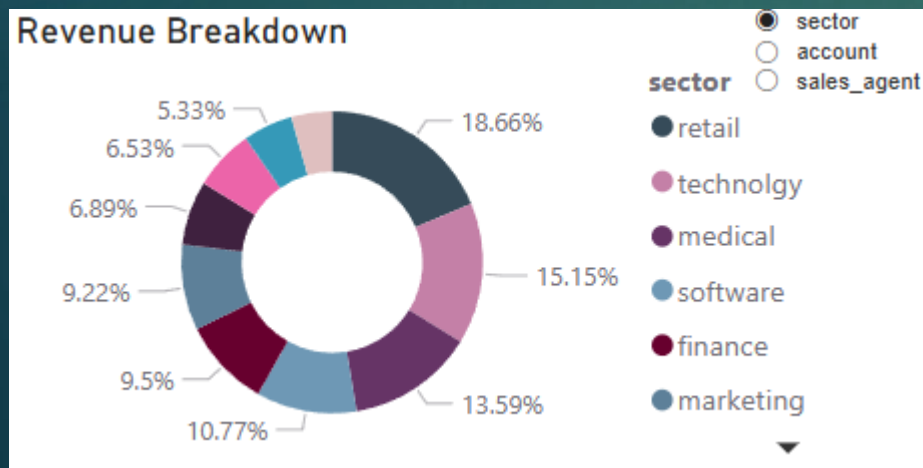
1. Sales Performance

➔ KPIs: Total revenue, number of won deals, average deal size

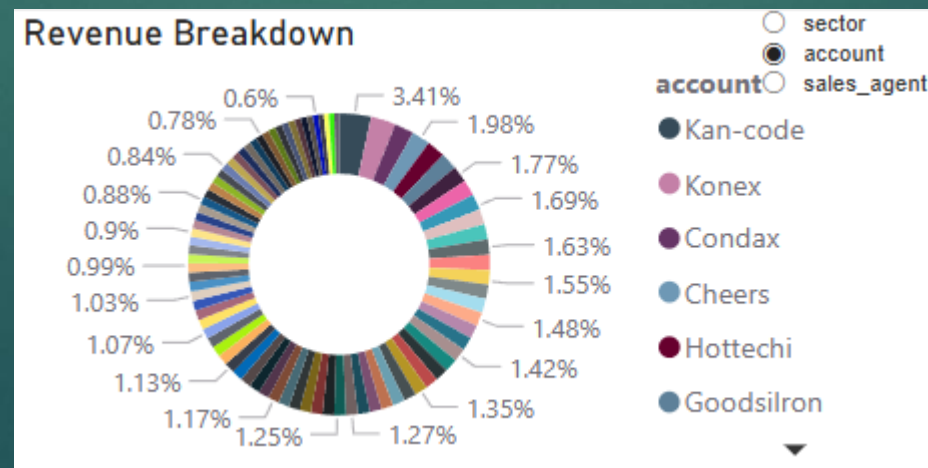


➔ Revenue breakdown by industry, company, and sales agent

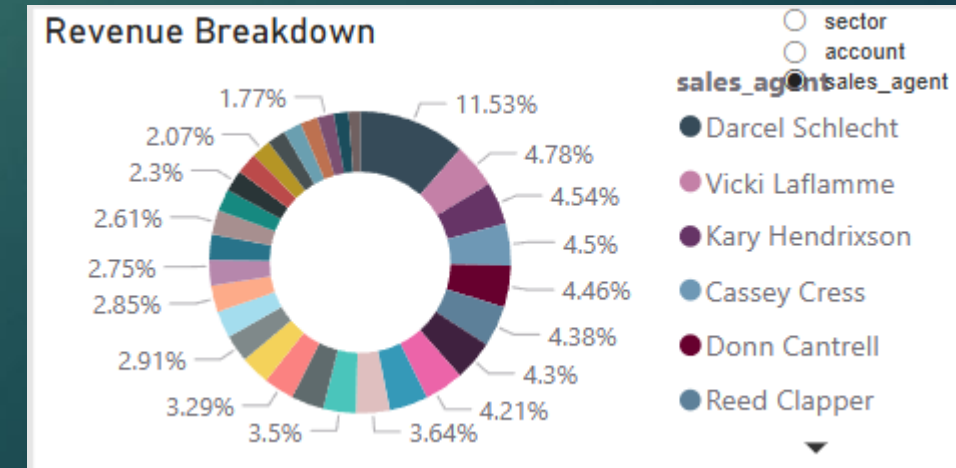
By Sector



By Account



By Sales Agent

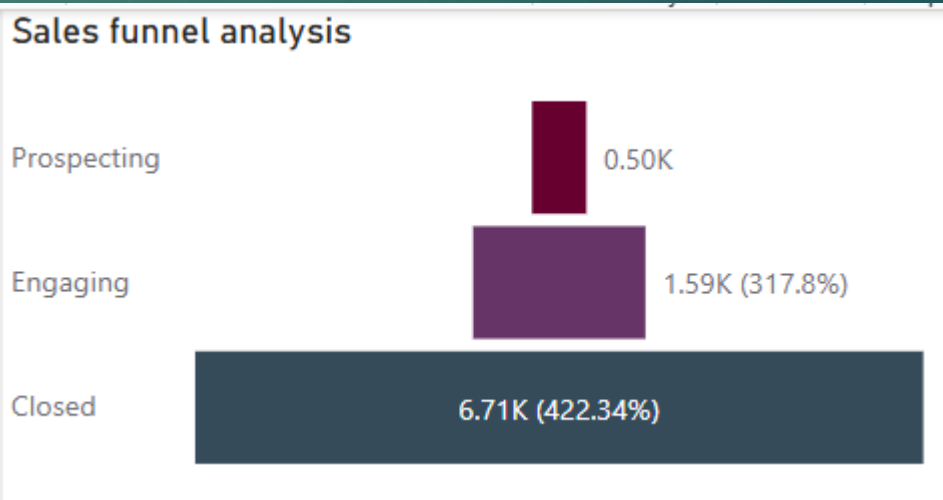
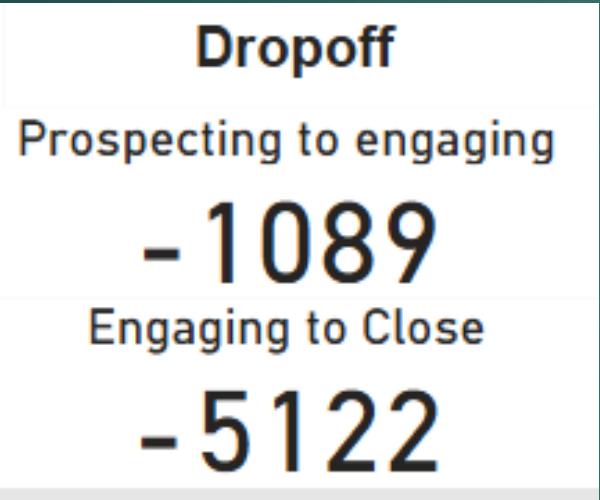


2. Customer satisfaction linked statistically to churn rates

Dashboard highlights

2. Sales Funnel Analysis

➡ Drop-off analysis at each stage (Prospecting → Engaging → Won/Lost)



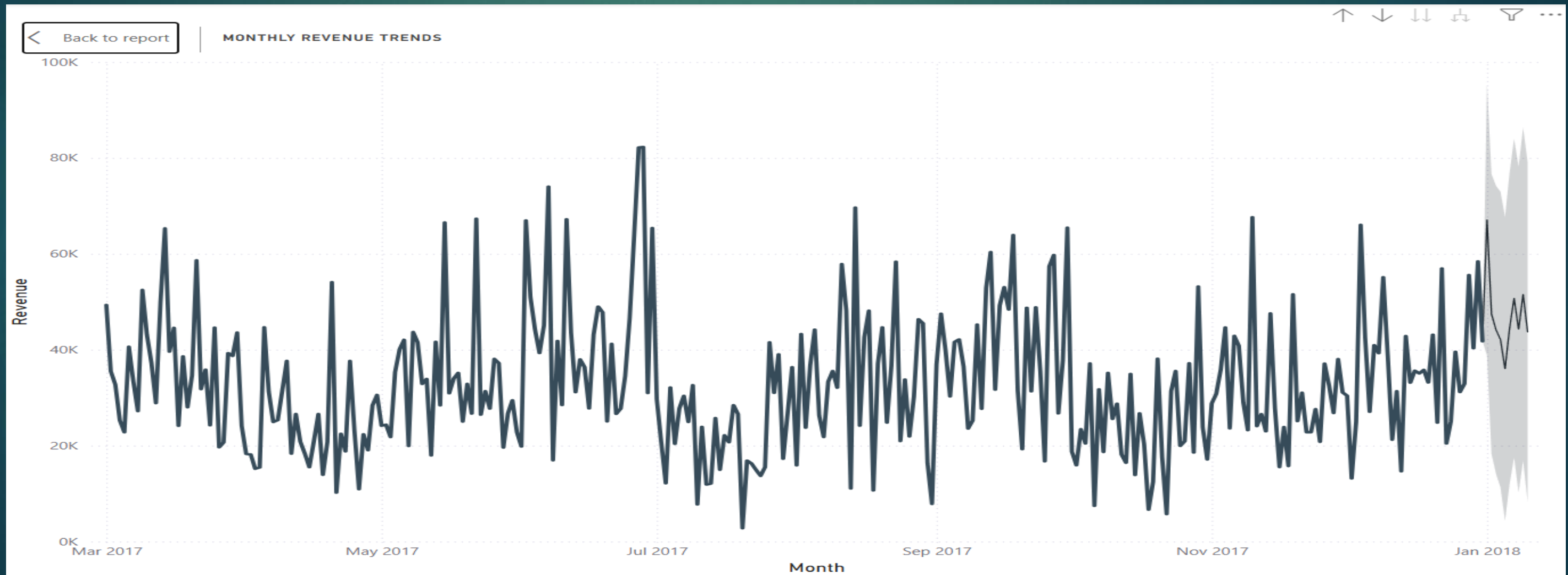
➡ Conversion rates at each stage

Conversion Rates	Dropoff
Prospecting to engaging	Prospecting to engaging
3.18	- 1089
Engaging to Close	Engaging to Close
13.42	- 5122

Dashboard highlights

3. Monthly Revenue trends

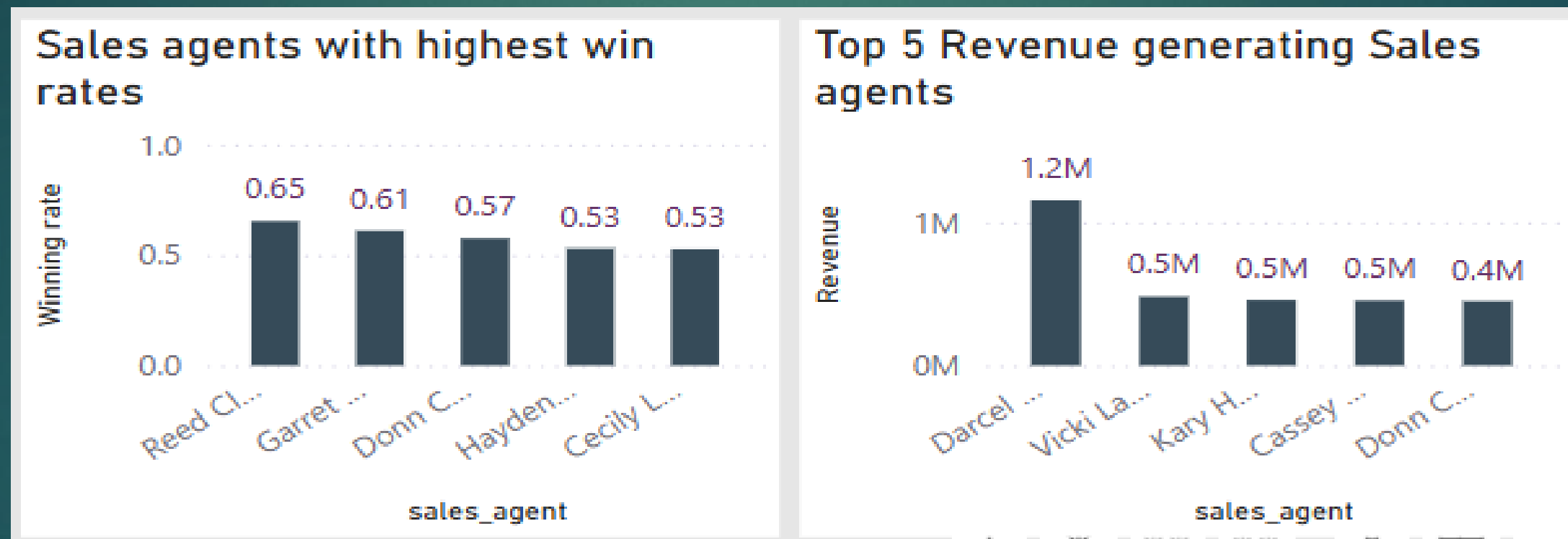
- ➡ Line chart showing monthly revenue trends
- ➡ Forecasting for future revenue growth



Dashboard highlights

4. Sales Agent performance

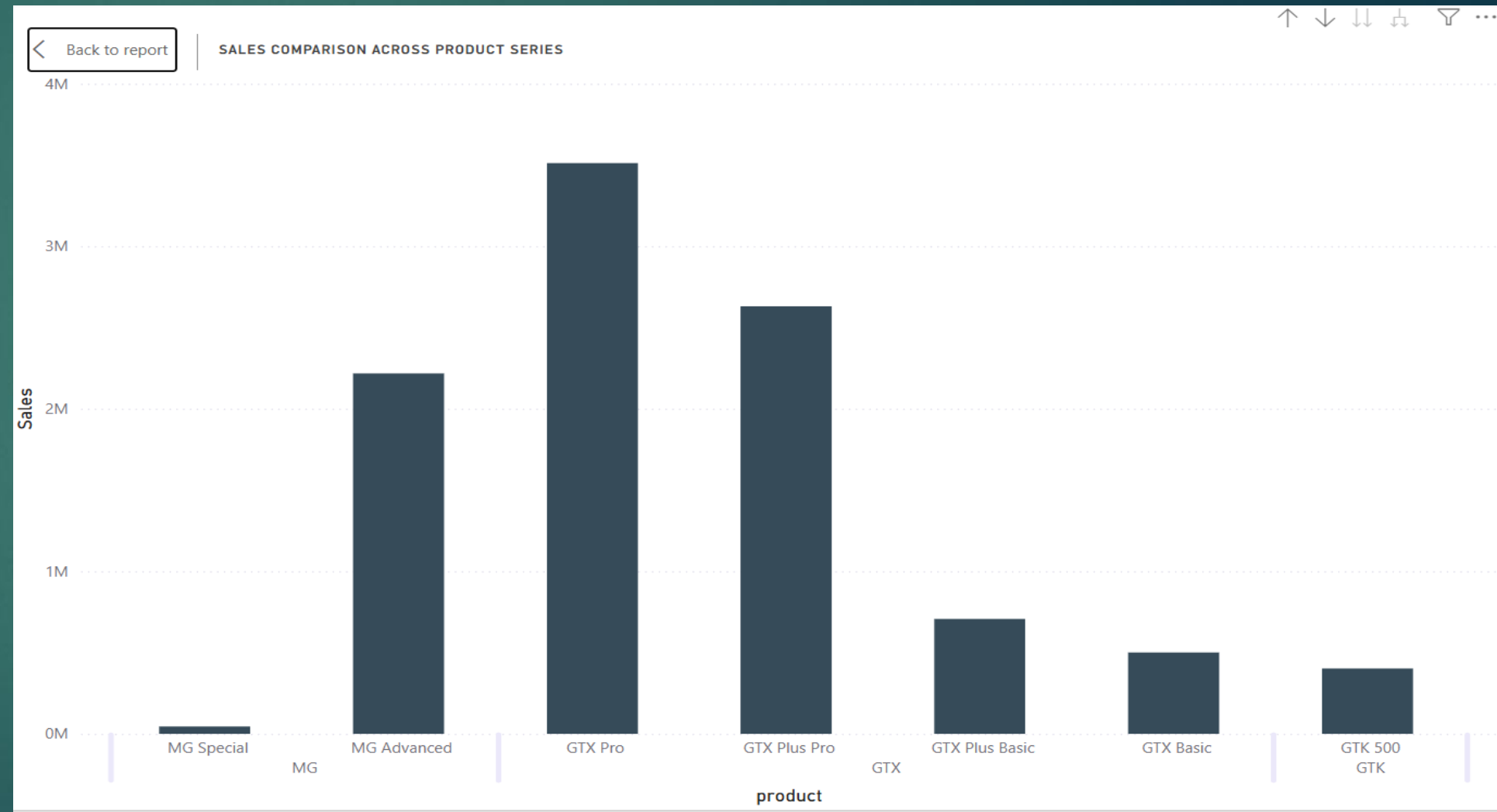
- ➡ Ranking of agents based on closed deals & revenue
- ➡ Win-rate comparison for different agents



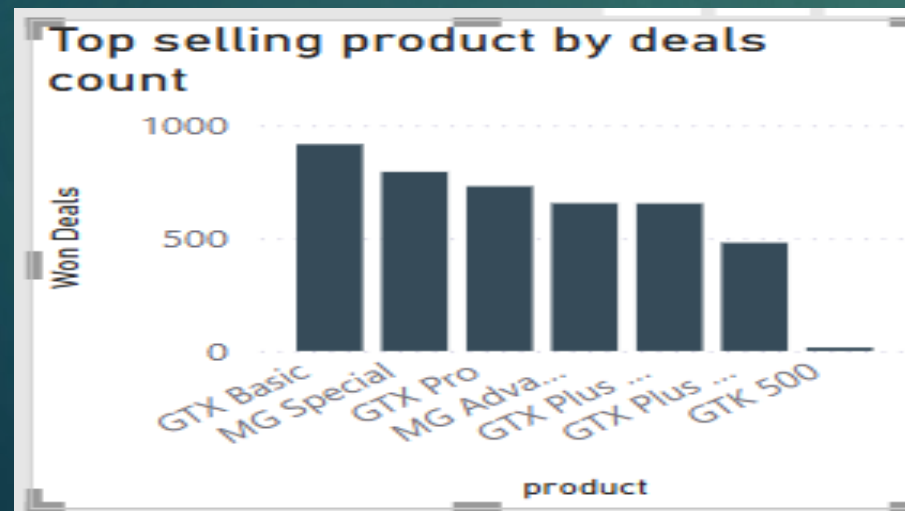
Dashboard highlights

5. Product performance

→ Comparison of sales across different product series



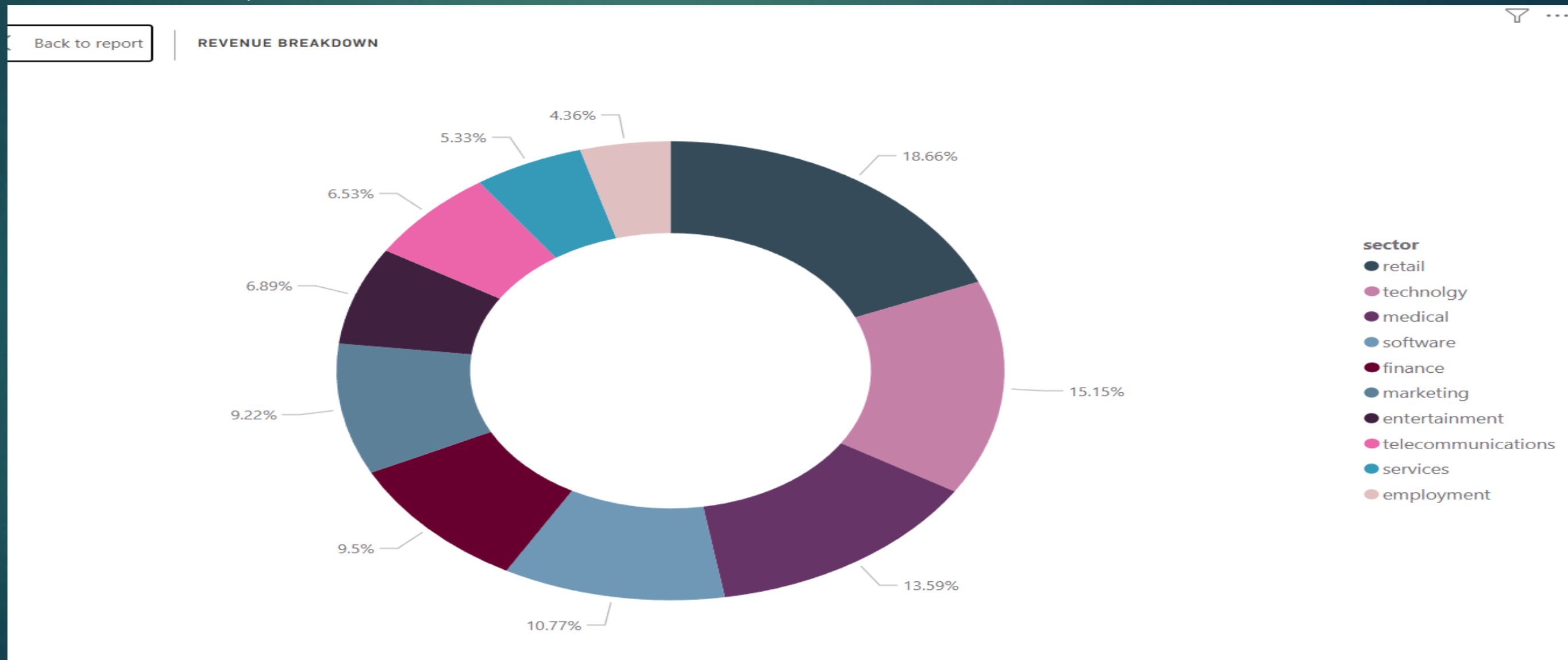
→ Top-selling products by revenue and deal count



Dashboard highlights

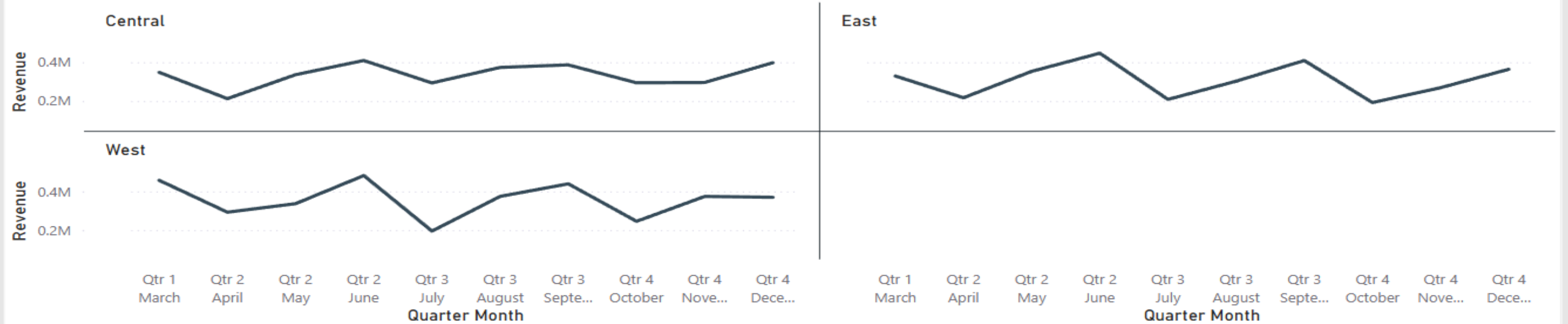
6. Industry & Regional Insights

➔ Revenue contribution by sector



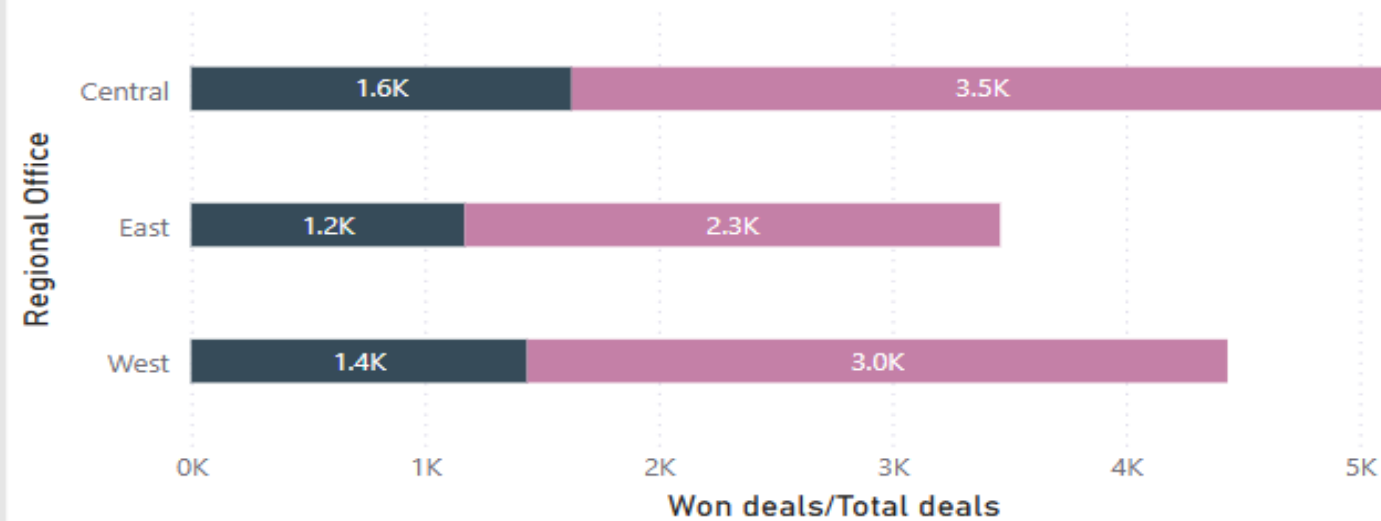
➡ Regional Performance

Monthly regional sales performance

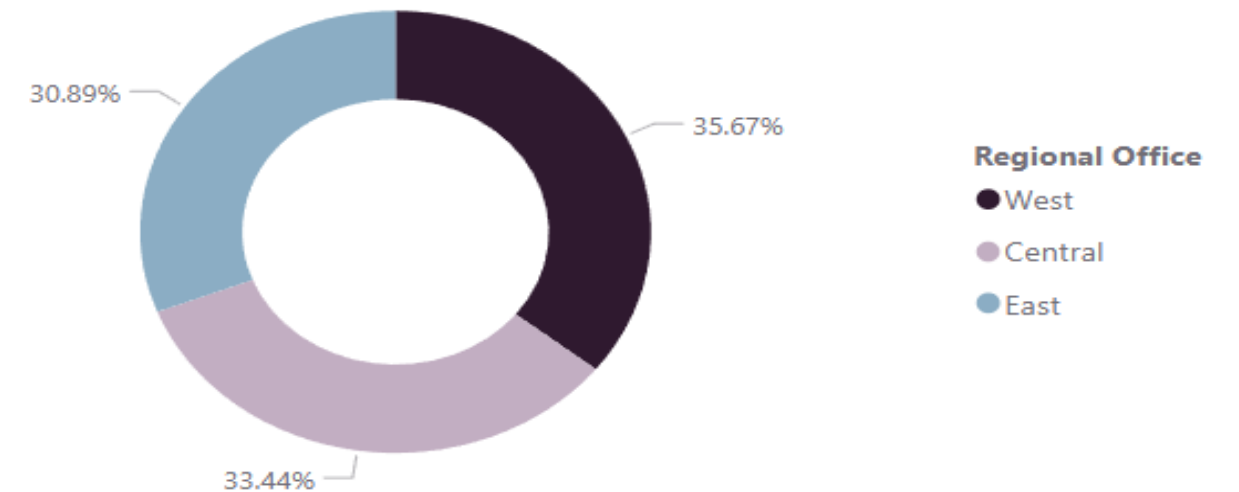


Region-wise Won deals/Total deals

● Sum of WonDeals ● Sum of TotalDeals



Revenue contributions



Key Findings

- ➔ Anna snelling from Central office has closed most high value deals
- ➔ Kan-code has fastest pipeline velocity where as Golddex moves slowest in pipeline.
- ➔ It takes longest to close a deal in Entertainment industry.
- ➔ Retail sector generates largest revenue, Kancode account is biggest contributor In revenue and Darcel schelcht brings the most revenue , and Reed clapper has the highest win rate.
- ➔ GTX Basic is the most selling product but GTX pro generates highest revenue.

Actionable Recommendations: Optimizing Sales Strategy



Pipeline Restructuring

Focus on improving engagement stage follow-ups.



Upskill mid-tier Agents

Learn from high-performers to boost average win rates.



Customer Retention Focus

Proactively reach out to accounts flagged as high churn risk.



Product Building

Promote top-performers with underperforming but high-margin products.

Sales Pipeline Optimization: Boosting Efficiency & Velocity

1

Eliminate Bottlenecks

Reduce long sales cycles and improve conversion at key stages.

2

Accelerate Deal Velocity

Streamline approvals and empower sales reps for quick decisions.

3

Forecast Trends

Predict seasonality and align staffing and resources proactively.