Sales Funnel Optimization Case Study

Objective: Built a robust sales pipeline by analyzing CRM and outreach data to identify high-performing lead trends — exceeding time-bound quarterly quota goals.

- Tools Used:
  - Tableau (dashboarding & visual insights)
  - Excel (data prep, randomization, modeling)
  - CRM-style sales data
  - Outreach-style engagement data
- Key Results:
  - Achieved 121% of quota
  - Largest drop-off: Demo → Proposal
  - Top objection: Not the Decision Maker
  - Personal average deal size: 25-35% higher than the team average
  - PPC and SEO were top-performing lead sources

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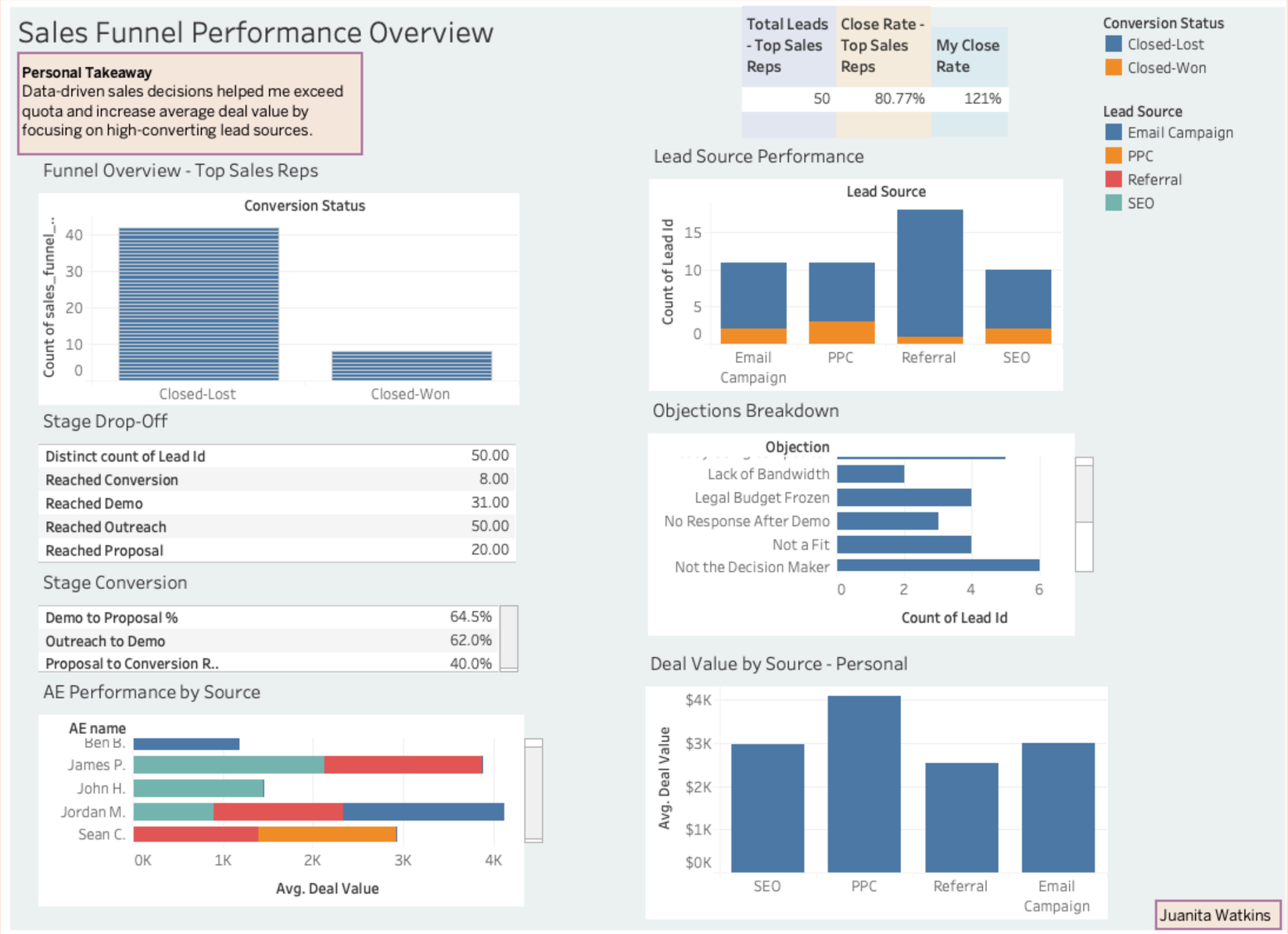

Insights:

- Early qualification (confirming decision-maker status) directly impacts deal quality.
- Visualizing drop-off stages helped prioritize high-leverage fixes.
- Data exploration revealed that highest conversion rates didn't always mean highest deal values — sales strategy should balance both.
- Small CRM details (like objection tracking) can uncover huge process opportunities.