

# Sales Funnel Optimization Case Study

Built a robust sales pipeline by identifying high-performing lead trends using CRM and outreach data — exceeding quota within the set time frame.

Presented by:

Juanita Watkins

 This event has live translations.

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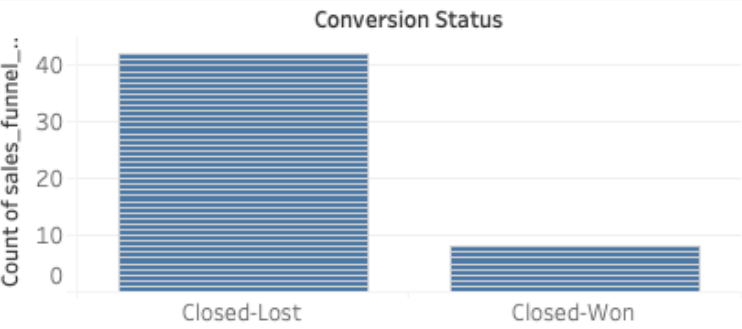
Quota Attainment Strategy Using CRM + Outreach Data

- Used synthetic Salesforce + Outreach-style data
- Goal: Identify patterns among top reps to improve my own close rate & build a robust pipeline
- Achieved 121% of quota through data-backed sales adjustments

Sales Funnel Performance Overview

**Personal Takeaway**  
Data-driven sales decisions helped me exceed quota and increase average deal value by focusing on high-converting lead sources.

Funnel Overview - Top Sales Reps



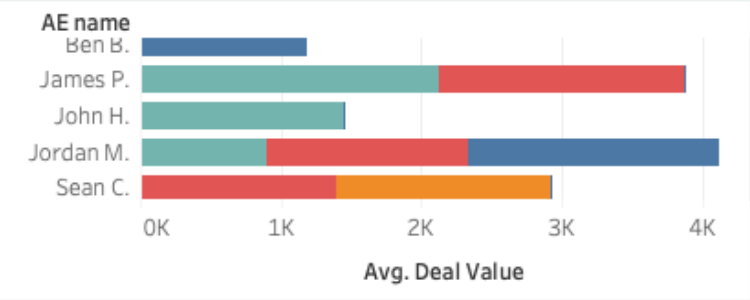
Stage Drop-Off

Distinct count of Lead Id	50.00
Reached Conversion	8.00
Reached Demo	31.00
Reached Outreach	50.00
Reached Proposal	20.00

Stage Conversion

Demo to Proposal %	64.5%
Outreach to Demo	62.0%
Proposal to Conversion R..	40.0%

AE Performance by Source



Total Leads - Top Sales Reps	Close Rate - Top Sales Reps	My Close Rate
50	80.77%	121%

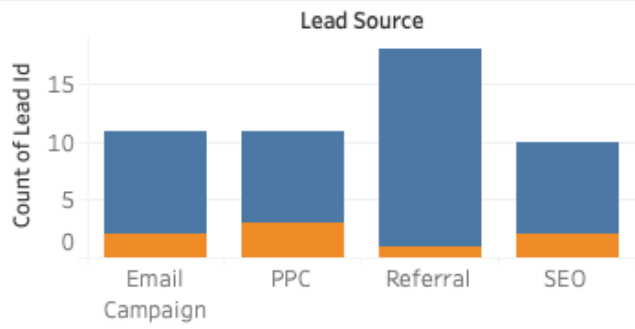
Conversion Status

- Closed-Lost
- Closed-Won

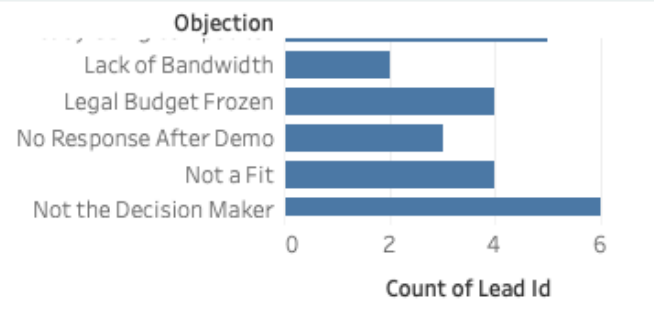
Lead Source

- Email Campaign
- PPC
- Referral
- SEO

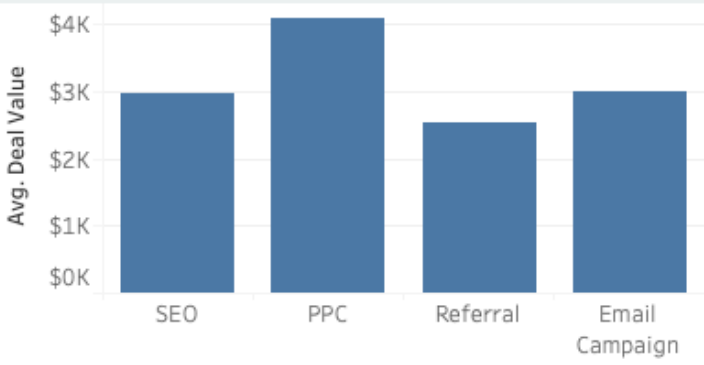
Lead Source Performance



Objections Breakdown



Deal Value by Source - Personal



Juanita Watkins

Key Takeaways:

- Most deals lost between demo and proposal → prompted stronger follow-up scripts
- PPC leads led to largest average deal values, including a \$4K+ win
- SEO performed best for conversion rate, not deal size
- Most common objection: Not the Decision Maker → new question added to first contact script to confirm authority early
- Data-driven adjustments led to higher close rate and larger deals

\*\*\*This analysis taught me to focus follow-ups on DM qualification and proposal clarity.\*\*\*