

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.

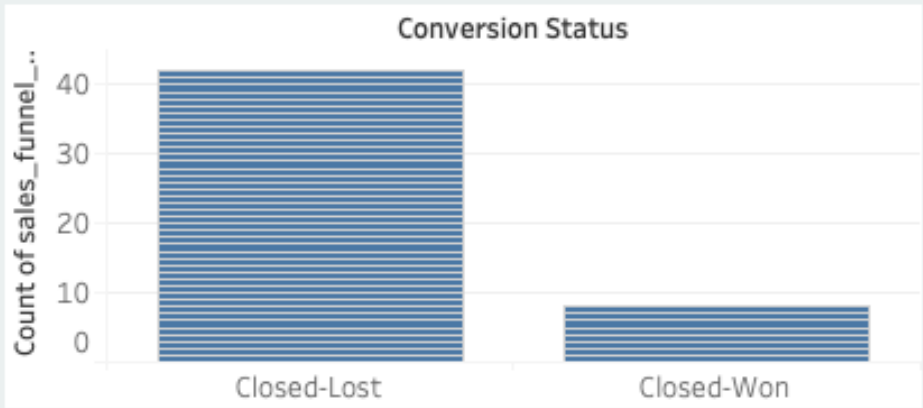


- Tools Used:
 - Tableau (dashboarding & visual insights)
 - Excel (data prep, randomization, modeling)
 - CRM-style sales data
 - Outreach-style engagement data
- Key Results:
 - Achieved 121% of quota
 - Largest drop-off: Demo → Proposal
 - Top objection: Not the Decision Maker
 - Personal average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

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



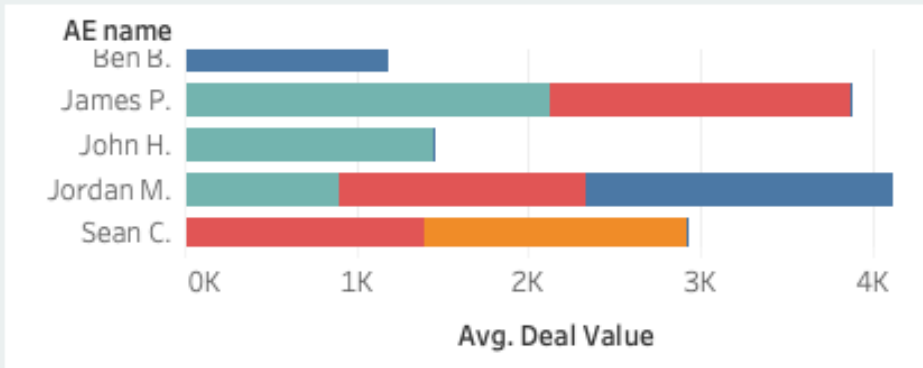
Stage Drop-Off

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%

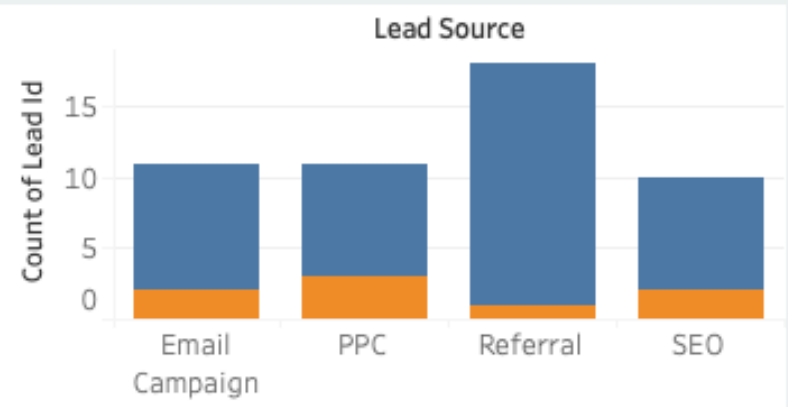
Conversion Status

- Closed-Lost
- Closed-Won

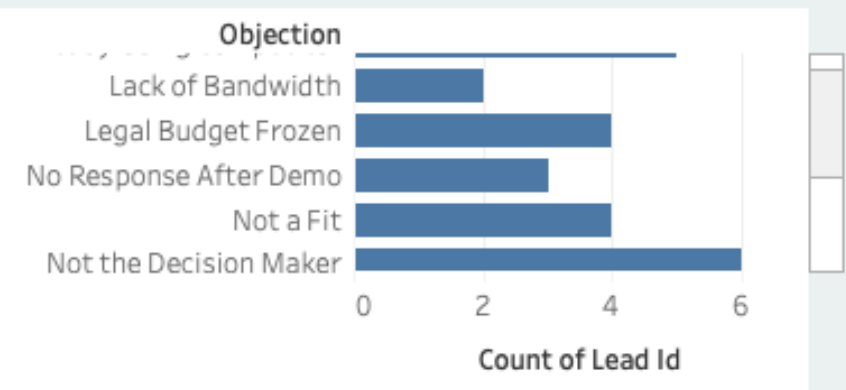
Lead Source

- Email Campaign
- PPC
- Referral
- SEO

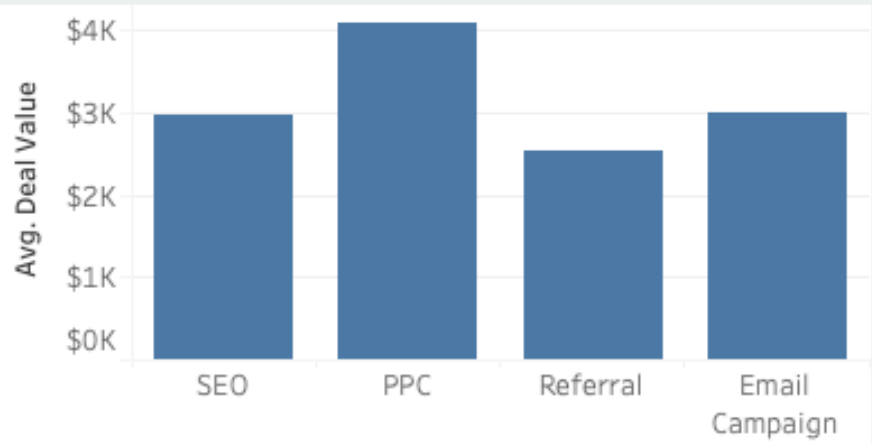
Lead Source Performance



Objections Breakdown



Deal Value by Source - Personal



Juanita Watkins

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.