

Smart Biz

a BI System for **SalesForce**





Smart Biz --- the problem we solve

**Maybe you
are bothered
by**

1

Who and how is my client ?

2

How is my MKT/Sales team's performance?

3

How to improve the L2C conversion ?

4

Too many dashboard and report in Salesforce?

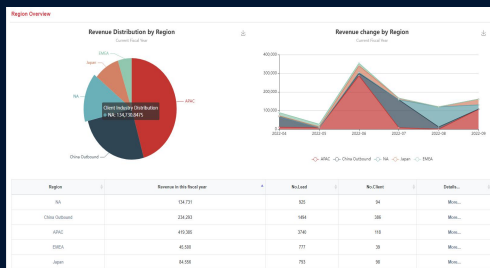
5

What can I learn from the close-win case ?

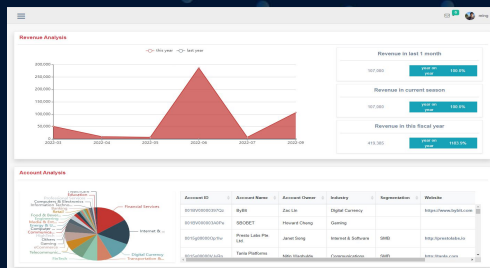
6

What is the sales performance on different industry?

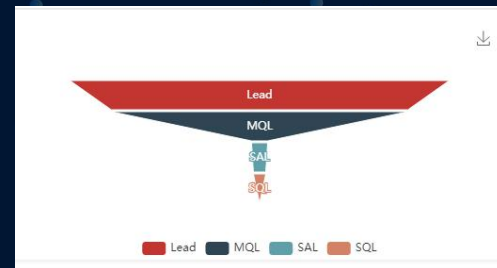




Overall Sales




Regional Performance Monitoring



Lead to Cash Funnel Tracking

Client Profile



Client Name

Headcity

Country

Region

Industry

Sales

Big Company (Y/N)

Employee Numbers

Py/Py Corporation

Japan

Japan

Japan

Industry: Japan (Financial Services)

Yes

Yes

None

CSG Team

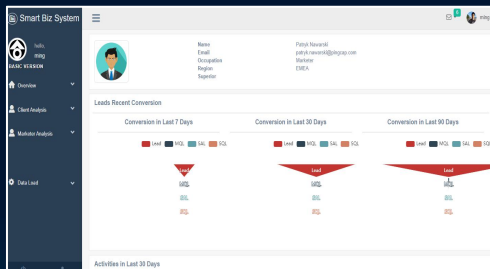
Marketing

Sales

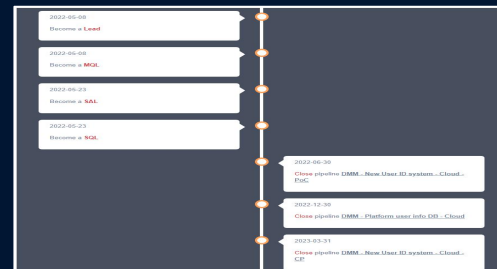
Related Pipeline

PPL Name	PPL Stage	Forecast Type	Risk Rating	PPL Probability	A/C Amount	Close Date
Payco Operation subcontract - 2	Closed Won	Commit	Low	100%	¥95A-40708037	2020-06-01
Payco System subcontract - 4	Contact Rejected	Commit	Low	90%	¥95A-40708037	2020-10-01
Payco System subcontract - 5	Contact Rejected	Commit	Low	90%	¥95A-40708037	2020-10-01

Client Pipeline Tracking



Marketer Performance



Client Success Story Review

Smart Biz BI system



Sales
Analysis

Client
Profile

Lead to Cash
Tracking

Region/Industry
Analysis

HTML

CSS

JQuery

Bootstrap

Echarts

Postgresql

Django

Numpy

Scikit-
Learn

Logging

Salesforce

Hubspot

Data
Warehouse

Google
Big Query

Database



CRM Platform



Other



TEXT



Image



Video



Web Spider



Auto - ETL



Data Clean




Data Enrich

Data Quality
CheckData Integrity
Check

Smart
Biz

Client Profile



Client Name

Website

Country

Region

Industry

Labels

Big Company (Yes/No)

Employee Numbers

PayPay Corporation

Japan

Japan

Financial Services

Yes

Client Profile

CSG Team

Marketer

Salor

Mrs. Takayama

Mr. Honda

CSG Team

Related Pipeline

PPL Name	PPL Stage	Forecast Type	Risk Rating	PPL Probability	ACV Amount	Close Date
Paypay Operation outsourcing - 2	Closed Won	Commit	Low	100.0%	3	
Paypay Operation outsourcing - 4	Contract Review	Commit	Low	90.0%	3	
Paypay Operation outsourcing - 5	Contract Review	Commit	Low	90.0%	31034.4827586207	2023-03-01

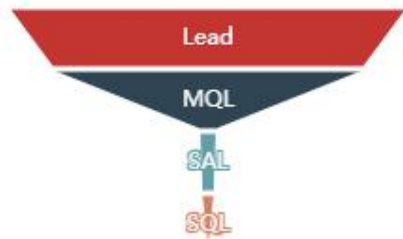
related Pipelines

Client Orders

Order Number	Order Start Date	Order Amount	Order Currency	Order Status	Re
JP-OF-17777246	2022年2月14日	36206.8970689655	JPY	Activated	Pa

Order

Lead to Cash funnel



Lead MQL SAL SQL

Seq	Stage	No.Contacts	%.Contacts
1	Lead	4606	53.8
2	MQL	3603	42.1
3	SAL	196	2.3
4	SQL	150	1.8

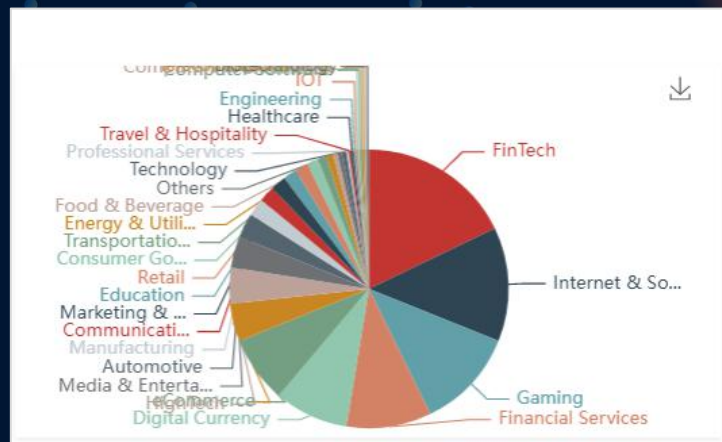
Lead to Cash
Funnel

The statistics of the Lead to Cash stages

Fintech

Financial
ServicesInternet
&
Software

Gaming


E-
commerc
e

distribution

Account ID	Account Name	Account Owner	Industry	Segmentation	Website
001BV00002OpF9	abc	Alden Kang	Others	SMB	
001BV000034Mia	Gaissnode	Charles Zheng	FinTech		https://glassnode.com/
001BV000034QVQ	ethplorer	Charles Zheng	FinTech		https://ethplorer.io/zh/
001BV00003CCqH	Solusfutura Limited	Dingyi Yu			http://www.solusfutura.com

details

Client Profile



Client Name
Website
Country
Region
Industry
Labels
Big Company (Yes/No)
Employee Numbers

PayPay Corporation
Japan
Financial Services
Yes

CSG Team

Marketer
Inbound Sales
Presales
Sales

Mr Mouki
Mr Suzuki
Mr Subarasi
Mr Yamamoto

Activities on different stage

L2C Stage	Sent Emails	Sent Calls
Lead	4	1
SQL	3	6
Opportunity	3	1
Contract Time	1	1

Lead to Cash Time Log

2022-06-15
Become a **Lead**

2022-06-14
Become a **SQL**

2022-06-01
Close pipeline Paypay Operation outsourcing _2

2022-12-01
Close pipeline Paypay Operation outsourcing _4

2023-03-01
Close pipeline Paypay Operation outsourcing _5

Client Profile

Client profile include

- client name
- industry
- website
- region, country
- employee numbers

related activities






Related activities include

- sent email details
- send call details
- meetings
- campaigns

time log

Time log include

- when become **Lead**
- when become **SQL**
- when start **Opportunity**
- when start first **order**

Features	Salesforce	Hubspot	PowerBI	Tableau	Smart Biz
complexity	High	High	Middle	Middle	Low
Learning Cost	High	High	Middle	High	Low
AI Feature	Weak	Weak	Middle	Middle	Strong
Customizable					
Price	High	Middle	Middle	High	Low

Thank You

