

ASSIGNMENT

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Problem Statement

The sales pipeline conversion percentage at TechnoServe (a tech SaaS startup) has dropped from 35% at the end of last fiscal (FY 2017-18) to 25% at present.

Assignment Objective

Understand the problem, come up with a hypothesis for low conversions faced by TechnoServe, and analyse the dataset provided to arrive at possible solutions to increase it.

PART I : 1. Understanding the Problem

Sales Pipeline Conversion at a SaaS Startup

Who?

- ❑ The company (TechnoServe) and its sales/marketing teams.
- ❑ Customers who are not converting due to unmet expectations.

What?

- ❑ A drop in pipeline conversion rates from 35% (FY 2017-18) to 25%.
- ❑ Key issues:
 - Outdated product offerings.
 - Ineffective marketing channels.
 - Cost-cutting measures reducing marketing and product innovation.

When?

- ❑ Over the last fiscal year, due to stagnation in product development and cost-cutting in marketing strategies.

Where?

- ❑ Across sales and marketing processes:
 - Product-market alignment.
 - Channel engagement strategies.

How?

- ❑ Lack of product updates to meet market needs.
- ❑ Ineffective use of engagement channels.
- ❑ Budget constraints affecting direct sales and marketing events.

PART I : 2. Understanding the Problem

Sales Pipeline Conversion at a SaaS Startup

Situation

- ☐ What is the current pipeline conversion rate, and how does it compare to industry benchmarks?
- ☐ How are leads currently being generated and tracked within the organization?
- ☐ What channels are currently being used for marketing and sales efforts?
- ☐ How are marketing events planned, executed, and evaluated for effectiveness?

Problem

- ☐ What specific challenges are being faced with the current marketing channels?
- ☐ How has the reduction in marketing events impacted lead generation and conversion?
- ☐ What are the main reasons for the lower conversion rates of marketing leads?

Implication

- ☐ How does the low pipeline conversion rate affect overall business revenue and growth?
- ☐ What are the potential long-term impacts of not addressing the ineffective social marketing channels?
- ☐ How does the misalignment of market expectations affect customer satisfaction and retention?

Need-Payoff

- ☐ What benefits would be realized by optimizing the right channels of engagement?
- ☐ How would targeting the right points of contact improve lead conversion rates?
- ☐ What would be the impact on the business if marketing budgets were adjusted to allow for more effective marketing events?

PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

Framework Used

1. 5Whys
2. 5Ws
3. SPIN
4. Issue Tree

Reason for using the selected framework

1. 5whys to understand the problem.
2. 5Ws for identifying the key elements affecting the problem.
3. SPIN for understanding the situation, actual problem, the effects the problem causing and the necessary tasks to be done to solve the issue.
4. Used issue tree for systematically breaking down complex problems into smaller, manageable components to identify root causes and generate actionable solutions.

How you have used the framework here

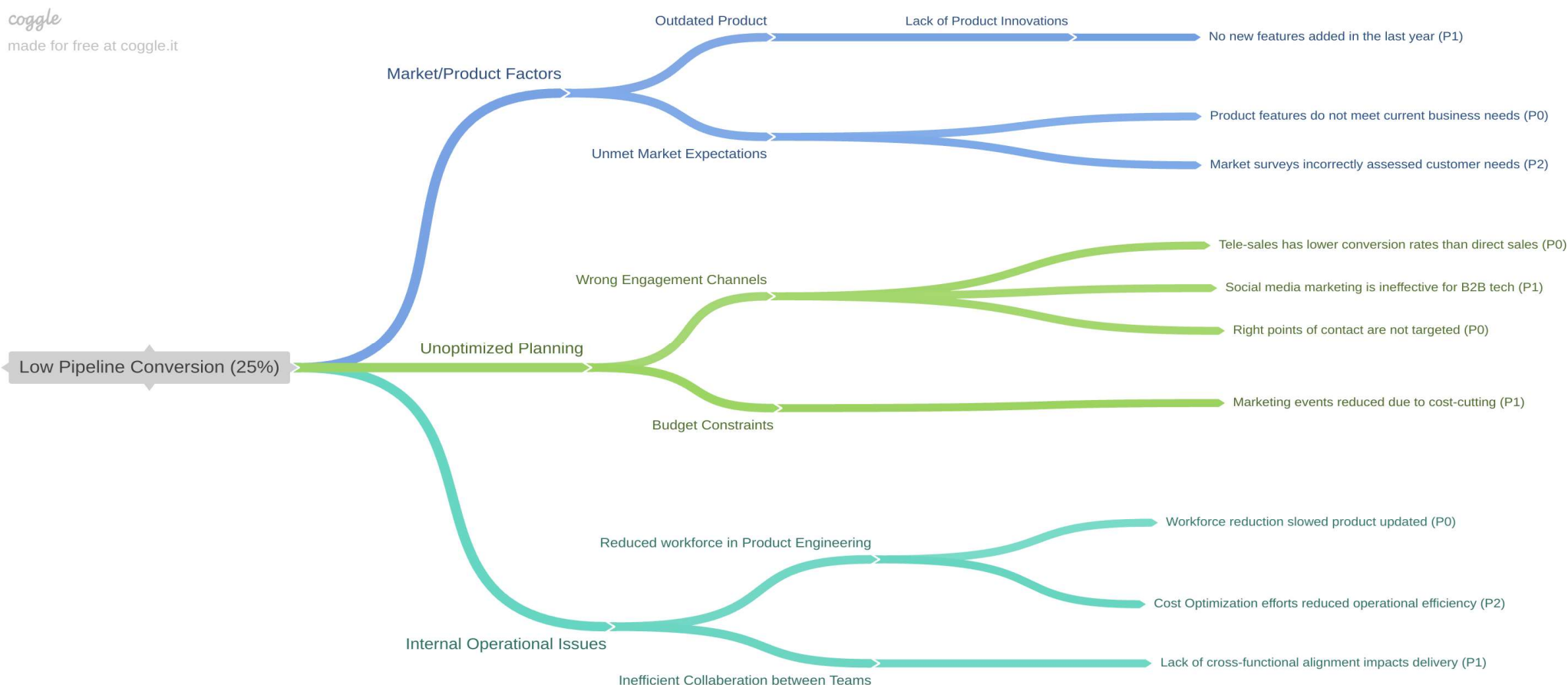
I have used all the above mentioned frameworks by analysing the given 5Whys statements and used its statements according to the framework I am using and by comparing the points of the frameworks and 5Whys statements, found the key affecting elements to the main issue.

PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

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PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

Branch 1

Lower Pipeline Conversion (25%) – Market/Product factors – Outdated Product – Lack of Product Innovations – No new features added in the last year (P1)

Branch 2

Lower Pipeline Conversion (25%) – Market/Product factors – Unmet Market Expectations – Product features do not meet current business needs (P0)

PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

Branch 3

Low Pipeline Conversion (25%) – Market/Product factors – Unmet Market Expectations – Market surveys incorrectly assessed customer's needs (P2)

Branch 4

Low Pipeline Conversion (25%) – Unoptimized Planning – Wrong Engagement Channels – Tele-sales has lower conversion rates than Direct sales (P0)

PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

Branch 5

Low Pipeline Conversion (25%) – Unoptimized Planning – Wrong Engagement Channels – Social media marketing is ineffective for B2B tech (P1)

Branch 6

Low Pipeline Conversion (25%) – Unoptimized Planning – Wrong Engagement Channels – Right points of contact are not targeted (P0)

PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

Branch 7

Low Pipeline Conversion (25%) – Unoptimized Planning – Budget Constraints – Marketing events reduced due to cost-cutting (P1)

Branch 8

Low Pipeline Conversion (25%) – Internal Operational Issues – Reduced workforce in Product Engineering – Workforce reduction slowed product updates (P0)

PART II : Formulating Hypotheses

Sales Pipeline Conversion at a SaaS Startup

Branch 9

Low Pipeline Conversion (25%) – Internal Operational Issues – Reduced workforce in Product Engineering – Cost optimization efforts reduced operational efficiency (P2)

Branch 10

Low Pipeline Conversion (25%) – Internal Operational Issues – Inefficient collaboration between teams – Lack of cross-functional alignment impacts delivery (P1)

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

| Variable | Insights if any | Pattern of Insight |
|-----------------------|--|--|
| 1. City | 1. MUMBAI has the HIGHEST WIN RATES , while PUNE has the LOWEST WIN RATE . | SIGNIFICANT OUTLIER ABNORMAL DISTRIBUTION |
| 2. Technology Primary | 2. ANALYTICS have the HIGHEST WIN RATES but have the LOWEST LEADS COUNT and ERP IMPLEMENTATION software have HIGHEST LEADS COUNT and Decent WIN RATE and LEGECY MODERNIZATION is the WORST PRODUCT , having LOWEST WIN RATE & LEADS COUNT . | SURPRISING EXTREME |
| 3. B2B sales Medium | 3. ENTERPRISE SELLERS is the BEST SALES MEDIUM and ONLINE LEADS is the WORST . And we don't have much LEADS COUNT in TELE-SALES MEDIUM . | ABNORMAL_DISTRIBUTION SURPRISING EXTREME |

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

| Variable | Insights if any | Pattern of Insight |
|---------------------------|---|---|
| 4. Client Revenue Sizing | 4. Clients having 100K or LESS Quarterly Revenue has the BEST WIN RATES . | ABNORMAL DISTRIBUTION |
| 5. Client Employee Sizing | 5. Client on which company's 1K OR LESS MEN-HOURS gets spent is the BEST EMPLOYEE SIZING , having HIGHEST WIN RATE and HIGHEST LEADS COUNT and where MORE THAN 1K MEN-HOURS is required does not have much LEADS and have LOW WIN RATE . However, Employee sizing does not seem to be the factor to look after. | SURPRISING EXTREME ABNORMAL DISTRIBUTION |
| 6. Opportunity Sizing | 6. OPPORTUNITY SIZING of 10K to 30K tends to have GOOD WIN RATES , company have LOW WIN RATE and LESS LEADS COUNT on 30K OR MORE OPPORTUNITY SIZING . | ABNORMAL DISTRIBUTION SURPRISING EXTREME |

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

| Variable | Insights if any | Pattern of Insight |
|-----------------------------------|--|---|
| 7. Business from client last year | 7. Company have a VERY HIGH WIN RATE on CLIENT with whom it had 0-100k BUSINESS LAST YEAR and company has THE BEST WIN RATE on client with whom it had 0-50k BUSINESS LAST YEAR . Company have the <u>HIGHEST LEADS COUNT on Client with 0 BUSINESS in Last Year but LOWEST WIN RATES.</u> | ABNORMAL DISTRIBUTION SURPRISING EXTREME |
| 8. Compete Intel | 8. Company have GOOD WIN RATE with clients where there is NO COMPETITION but LOWEST LEADS COUNT and where the competition is KNOWN Company has the LOWEST WIN RATE , Also where the COMPETITION IS UNKNOWN , Company has HIGHEST LEADS COUNT but with a LOW WIN RATE . | ABNORMAL DISTRIBUTION SURPRISING EXTREME |

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable under consideration:

CITY

SIGNIFICANT OUTLIERS:

- Mumbai:** The city has the HIGHEST WIN RATE of 25.37%, making it an outlier in terms of performance.

ABNORMAL DISTRIBUTION:

- Pune:** Despite being the company's base, it has the LOWEST WIN RATE of 18.88%. This suggests an unusual trend, as one might expect better performance from the company's home city. The distribution is abnormal because the expectations for Pune's performance are not met.

TECHNOLOGY PRIMARY

SURPRISING EXTREMES:

- Legacy Modernization:** This technology has the LOWEST WN RATE of (12.15%). This extreme is surprising given the other technology categories have more balanced percentages.

- ERP Implementation:** Having a high percentage of opportunities lost (76.65%), this technology category also has a relatively higher percentage of opportunities won (23.35%) compared to others, indicating some successes amid a higher loss rate.

- Analytics:** This technology category shows a significant WIN RATE (26.33%), standing out as having the HIGHEST WIN RATE compared to others.

- The Analytics technology products stand out as having the highest WIN RATE among all the products, while the Legacy Modernization being the WORST in WINNING.**

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable under consideration:

B2B SALES MEDIUM

ABNORMAL DISTRIBUTION:

- **Online Leads:** This medium has the LOWEST WIN RATE of 6.46%, This indicates a significantly high loss rate and, suggesting Online Leads have a poor conversion rate.
- **Partners:** It has 18.52% WIN RATE, with a high loss rate but still some level of success in winning opportunities.
- **Tele Sales:** It shows 21.90% WIN RATE, A comparatively better win rate than Marketing and Partners but not as high as Enterprise Sellers.

SURPRISING EXTREMES:

- **Enterprise Sellers:** The HIGHEST WIN RATE of 27.57% among the all sales mediums, indicating better performance in converting opportunities.
- **Marketing:** A high loss rate 81.43% but with Significant WIN RATE of 18.57% shows some success in winning opportunities, showing a more balanced performance compared to Online Leads.
- **Enterprise Sellers is the BEST SALES MEDIUM having the HIGHEST WIN RATE amongst all mediums and Online Leads is the WORST medium of sales.**

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable under consideration:

CLIENT REVENUE SIZING

ABNORMAL DISTRIBUTION:

- (100K to 250K), (250K to 500K) and (500K to 1M), These categories show consistent performance and lack significant deviations, fitting the pattern of abnormal distribution.

SURPRISING EXTREMES:

- (100K or less) and (More than 1M), These categories exhibit significant deviations in terms of volume or win/loss percentages, fitting the pattern of surprising extremes.
- **Clients with Less than 1M revenue sizes have WIN rate close to the average WIN rate, while MORE THAN 1M is having the LOWEST WIN RATE, it suggests that as the Client's revenue sizing increases that chances to WIN opportunity decreases.**

CLIENT EMPLOYEE SIZING

SURPRISING EXTREME:

- The MORE THAN 25K shows the LOWEST WIN RATE (19.01%), This is an extreme case compared to other employee sizes.

ABNORMAL DISTRIBUTION:

- The other categories (1K or Less, 1K to 5K, 5K to 15K, 15K to 25K) have relatively consistent win and loss percentages, hovering around 77-78% loss and 22-23% win. This consistency suggests an abnormal distribution, as the trend doesn't vary much across these different sizes.
- **This dataset reveals that larger client employee sizes (>25K) have a surprisingly higher loss rate and a lower win rate compared to smaller sizes, highlighting potential challenges or opportunities for improvement.**

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable under consideration:

OPPORTUNITY SIZING

ABNORMAL DISTRIBUTION:

•**40K to 50K:** This category has the LOWEST WIN RATE of 11.73%, which is abnormal compared to other sizing categories.

•**30K to 40K:** Won: 17.36% This category also shows a high loss percentage and a low win percentage, contributing to the abnormal distribution.

SURPRISING EXTREMES:

•**10K or less:** Won: 39.94% This category has the HIGHEST WIN RATE and the lowest percentage of losses, which is an extreme compared to other sizing categories.

•The win rate significantly decreases as the opportunity size increases, reaching its lowest in the 40K to 50K range.

•The loss rate significantly increases as the opportunity size increases, peaking in the 40K to 50K range.

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable under consideration:

BUSINESS WITH CLIENT LAST YEAR

ABNORMAL DISTRIBUTION:

- The **0 (NO BUSINESS)** category has an extremely LOW WIN RATE (17.32%), which is an abnormal distribution compared to other categories.

SURPRISING EXTREME:

- The **0 - 25,000** category shows THE HIGHEST WIN RATE (82.60%), which is surprising extreme compared to other categories.
- The **25,000 - 50,000**, **50,000 - 100,000**, and **More than 100,000** categories show a gradual decrease in win rates, indicating a trend where higher business amounts are more challenging to win.
- The largest volume of opportunities comes from clients with no prior business, but this category also has the highest loss rate.
- All these insights suggests, Higher the business with client last year Lower the WIN rate from them.

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Variable under consideration:

COMPETE INTEL

ABNORMAL DISTRIBUTION:

- **Known:** Won: 19.48% This category has the HIGHEST LOSS RATE compared to the overall average, indicating that when compete intelligence is known, the likelihood of losing is significantly higher.
- **None:** This category shows the HIGHEST WIN RATE of 31.65% compared to the overall average. The distribution is abnormal as the lack of compete intelligence seems to result in better outcomes.
- **Unknown:** Won: 21.77% This category falls closer to the overall average but still presents an interesting pattern where the unknown compete intelligence results in a higher loss rate.

SURPRISING EXTREMES:

- The **None** category has a surprising win rate of 31.65%, which is significantly higher than the other categories.
- The **Known** category has a surprising loss rate of 80.52%, which is higher than the other categories.

It suggests that having no compete intelligence might lead to better results, while known compete intelligence correlates with higher opportunity losses.

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Recommendations

CITIES:

1. Focus on improving win rates in Pune
2. Allocate more resources to Pune
3. Analyse Mumbai's success
4. Standardize best practices across cities

TECHNOLOGY PRIMARY:

1. Focus on improving win rates in Analytics and Legacy Modernization
2. Analyse ERP Implementation's success
3. Allocate more resources to lower performing categories

Corresponding Insights

1. Pune has the lowest win rate at 18.88%; this can boost overall performance.
 2. As the base city, Pune could benefit from additional resources to improve its win rate.
 3. Mumbai's win rate is highest at 25.37%; replicating its strategies could help other cities.
 4. Other cities have similar win rates, standardizing practices can ensure uniform performance.
-
1. Analytics has highest win rate 26.33% but not much opportunities available, Legacy Modernization has low win rate is 12.15%; addressing these can boost overall performance.
 2. ERP Implementation has a win rate of 23.35% while having highest total opportunities (49810); replicating its strategies could help other categories.
 3. Legacy Modernization and Technical Business Solutions could benefit from additional resources to improve their win rates.

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Recommendations

B2B SALES MEDIUM:

1. Focus on improving win rates in Online Leads
2. Investigate Marketing's performance
3. Leverage Enterprise Sellers' success
4. Enhance partner engagement and Strengthen Tele Sales

CLIENT REVENUE SIZING:

1. Focus on improving win rates for high-revenue clients (more than 1M)
2. Investigate performance for clients with revenue 500K to 1M
3. Leverage strategies used for clients with revenue 100K to 250K

Corresponding Insights

1. Online Leads have the lowest win rate at 6.46%; addressing this can boost overall performance.
 2. Marketing has a high loss rate (81.43%); implementing targeted strategies could improve conversion rates.
 3. Enterprise Sellers have the highest win rate at 27.57%; sharing best practices with other teams can help.
 4. Partners have a win rate of 18.52%; developing strategies to improve partner engagement can be beneficial. Tele Sales have a moderate win rate (21.90%); additional training or resources can further improve performance.
-
1. High-revenue clients have the lowest win rate at 19.31%; addressing this can boost overall revenue significantly.
 2. Clients with revenue 500K to 1M have a win rate of 22.39%; targeted strategies can improve conversion rates.
 3. Clients with revenue 100K to 250K have a relatively stable win rate at 22.75%; replicating these strategies can help other categories.

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Recommendations

CLIENT EMPLOYEE SIZING:

1. Focus on improving win rates for clients with **more than 25K** employees sizing
2. Maintain current strategies for clients with **1K or less** employees sizing
3. Investigate reasons for losses in **15K to 25K** employee sizing

OPPORTUNITY SIZING:

1. Focus on smaller opportunities (10K or less)
2. Re-evaluate larger opportunities (40K to 50K)
3. Improve mid-range opportunities (20K to 30K)

Corresponding Insights

1. This segment has the lowest win rate at 19.01%; addressing this can significantly boost overall performance.
 2. This segment has the highest number of opportunities and a win rate of 22.93%; ensuring consistency here is crucial.
 3. Similar loss rates (77.68%) indicate a need for targeted strategies to improve conversion rates.
-
1. Highest win rate (39.94%); concentrating efforts here can yield higher success.
 2. Lowest win rate (11.73%); reassessing strategies or reallocating resources can be beneficial.
 3. Moderate win rate (24.67%); targeted strategies can help improve conversion rates in this range.

PART III A : Generating Insights

Sales Pipeline Conversion at a SaaS Startup

Recommendations

BUSINESS WITH CLIENT LAST YEAR:

1. Focus on clients with no prior business
2. Retain and upsell clients in the 25,000 - 50,000 range
3. Improve win rates for high-value clients (more than 100,000)
4. Focus on mid-range opportunities (50,000 - 100,000)

COMPETE INTEL:

1. Focus on improving the Win rate in "Known" compete intel.
2. Leverage insights from successful "None" compete intel opportunities to enhance strategies for "Known" and "Unknown".
3. Consider data quality improvement efforts to reduce "Unknown" compete intel opportunities.

Corresponding Insights

1. This segment has a high loss rate (82.68%); targeted marketing and engagement strategies are needed to convert these opportunities.
 2. This segment has a good win rate (73.69%); continuing current strategies and exploring upselling opportunities can further boost success.
 3. High-value clients have a balanced win/loss rate; prioritizing high-touch engagement and personalized solutions can enhance conversions.
 4. Moderate win rate (61.71%); targeted strategies can help improve conversion rates in this range.
-
1. The win rate for "Known" compete intel is the lowest at 19.48%, despite having a high total count of opportunities (23,046).
 2. Opportunities with "None" compete intel have the highest win rate (31.65%), outperforming "Known" and "Unknown".
 3. A large portion of opportunities in the "Unknown" category suggests gaps in data collection or reporting processes.

PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

INTRODUCTION:

TechnoServe, a SaaS (Software as a service) company, we have identified a concerning **decline in its SaaS pipeline conversion rate, dropping from 35% to 25%**. This significant reduction has prompted a thorough investigation to uncover the underlying reasons contributing to this issue.

We are provided with the dataset of last year opportunities, The following presentation delves into the identified causes and outlines potential strategies to address and rectify this downward trend. By understanding the factors at play, TechnoServe aims to enhance its conversion rate and maintain its competitive edge in the SaaS market.

KEY RECOMMENDATIONS:

❑ Focus on Improving Win Rates in;

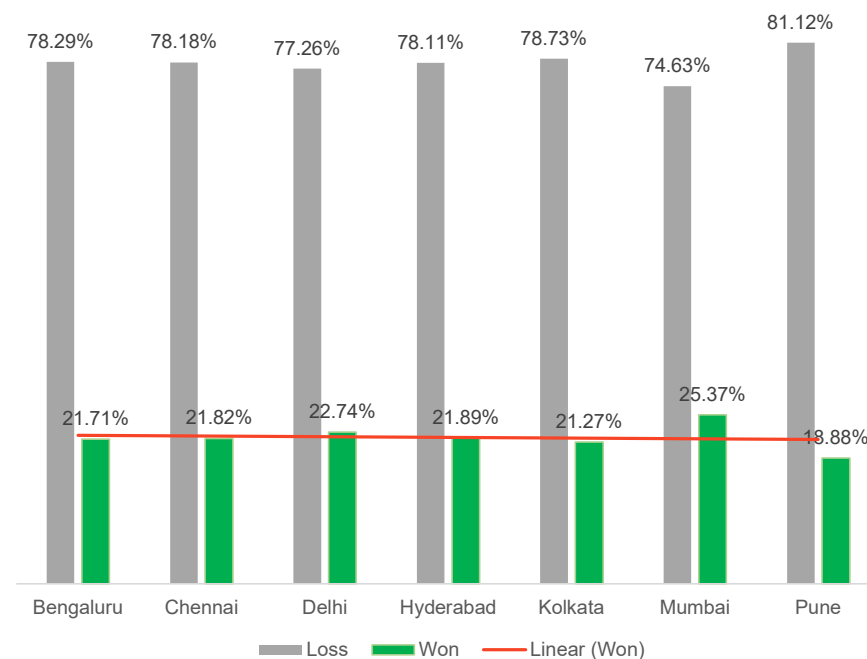
- Pune as it has the lowest win rate (18.88%) among the city variable.
- Legacy Modernization as technology primary variable, it has only 12.15%-win rate.
- Online leads, it has the lowest win rate (6.46%) among all B2B sales medium.
- Client with High-Revenue of more than 1M, we have only 19.31%-win rate here.
- Higher Opportunity sizes of 40K-50K having Lowest win rate of 11.73%.
- Client with 0/No Business because of Lowest Win rate of 17.32% despite having the most numbers of opportunities in this segment.
- Focus on the Known compete Intel, it has the lowest win rate of 19.48% despite having highest number of opportunities.

PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN CITIES:

- ❑ To boost performance, focus on **improving Pune's win rate (18.88%)** by investigating and addressing challenges.
- ❑ **Analyze Mumbai's success (25.37%)** and replicate best practices across all cities.
- ❑ Being base city of company, we need to improve our win rate in Pune which will improve its market reputation.
- ❑ Allocate more resources to Pune, leverage customer feedback, and implement a performance monitoring system to ensure ongoing improvement.
- ❑ By standardizing successful strategies and tailoring efforts to Pune's specific needs, the company can enhance overall win rates and achieve consistent performance across all locations.
- ❑ **Use successful tactics from Mumbai and apply them in other cities.**

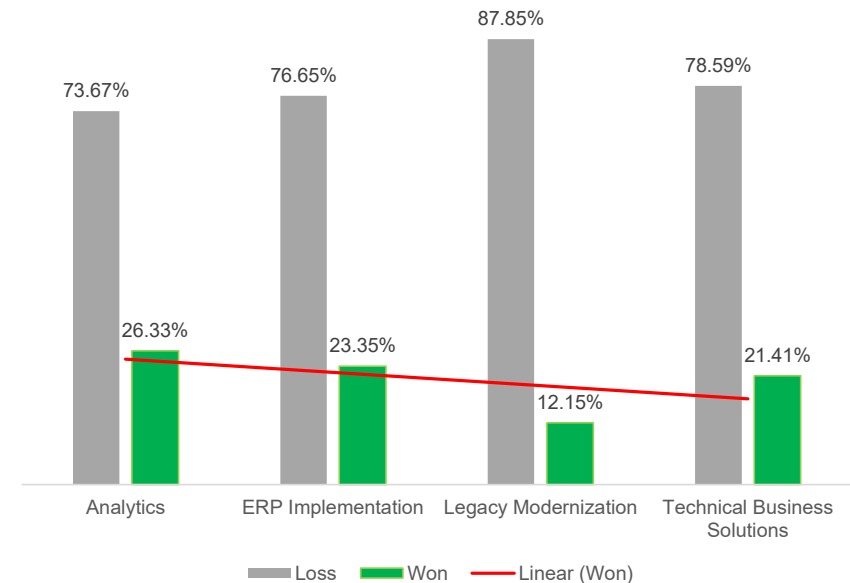


PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN TECHNOLOGY PRIMARY:

- ❑ The company should focus on improving strategies for **Legacy Modernization** due to its low win rate (12.15%).
- ❑ Analyzing and addressing the challenges in this category can enhance performance. Additionally, leveraging strengths in **Analytics**, which has the highest win rate (26.33%), can boost overall success.
- ❑ **ERP Implementation** should be prioritized, given its significant volume of opportunities.
- ❑ Lastly, investigating high-loss trends in **Technical Business Solutions** could uncover areas needing attention.
- ❑ **Keep the products updated with the demanding features in the market.**

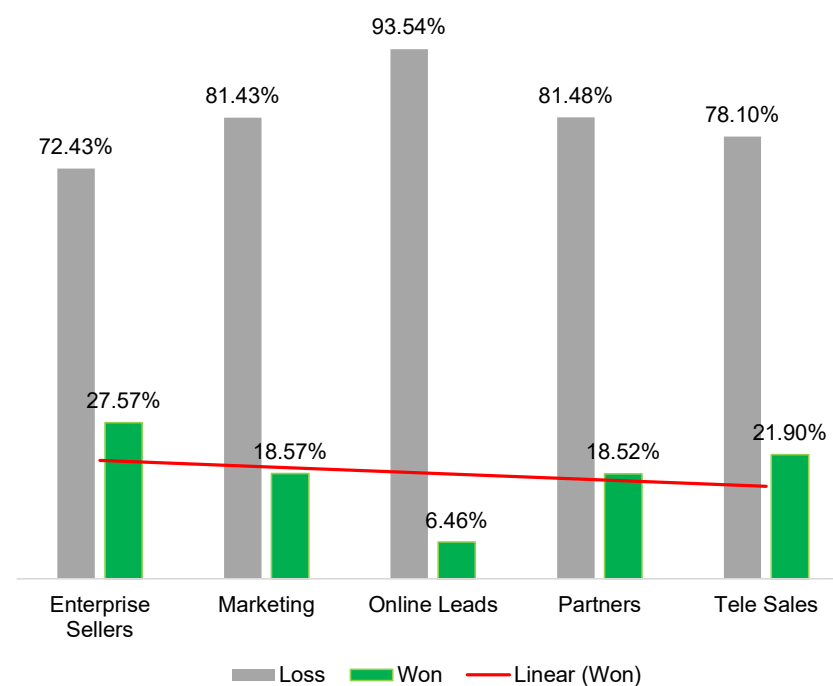


PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN B2B SALES MEDIUM:

- ❑ The company should focus on improving the conversion rates for **Online Leads**, it has **the lowest Win rate (6.46%)** and **Partners'** and **Marketing's** win rate as 2nd lowest win rates.
- ❑ Focus more on selling through **Enterprise Sellers** as it has the **highest win rate (27.57%)** and total opportunities as **34758**.
- ❑ We can do better in Tele-Sales by focusing on generating more leads in it.
- ❑ Strategies could include targeted training, optimizing marketing efforts, and enhancing lead nurturing processes. Leveraging successful practices from Enterprise Sellers across other channels may also boost performance.
- ❑ **Achieving more Wins in MARKETING**, analyzing the high-volume opportunities (37,262) handled by this medium can provide insights to improve overall efficiency and effectiveness.



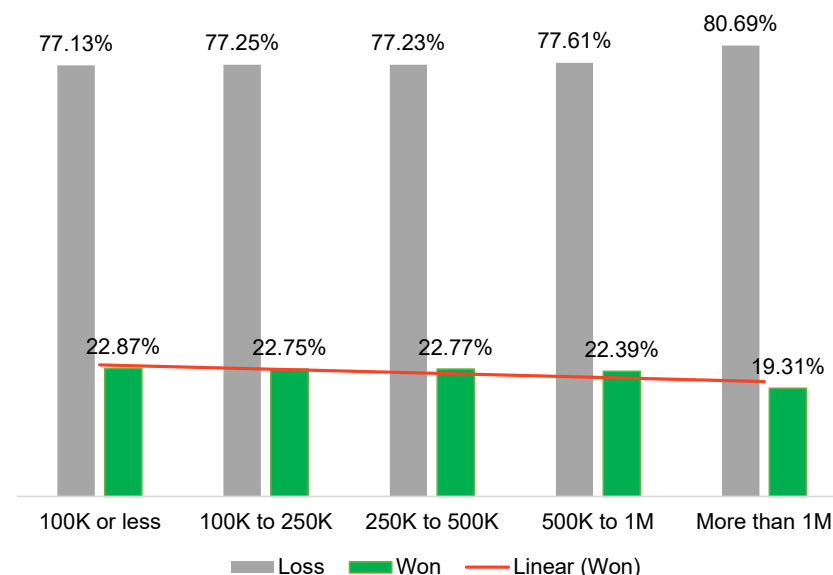
PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN CLIENT REVENUE SIZING:

- ❑ The company should focus on improving win rates, particularly for **high-revenue (more than 1M)** clients, as they have a **high loss percentage (80.69%)** despite significant potential.
- ❑ Strategies may include enhancing personalized engagement, addressing pain points, and offering tailored solutions. **Leveraging successful tactics from clients with lower revenue (win rate 22.87%)** could provide valuable insights.
- ❑ **Prioritizing resources towards the highest opportunity segment (clients with 100K or less revenue, 59,504 opportunities)** can maximize potential wins.

NOTE: Overall, this variable does not seem to be more focused on, as all the segments in this have win rates close to the average line.

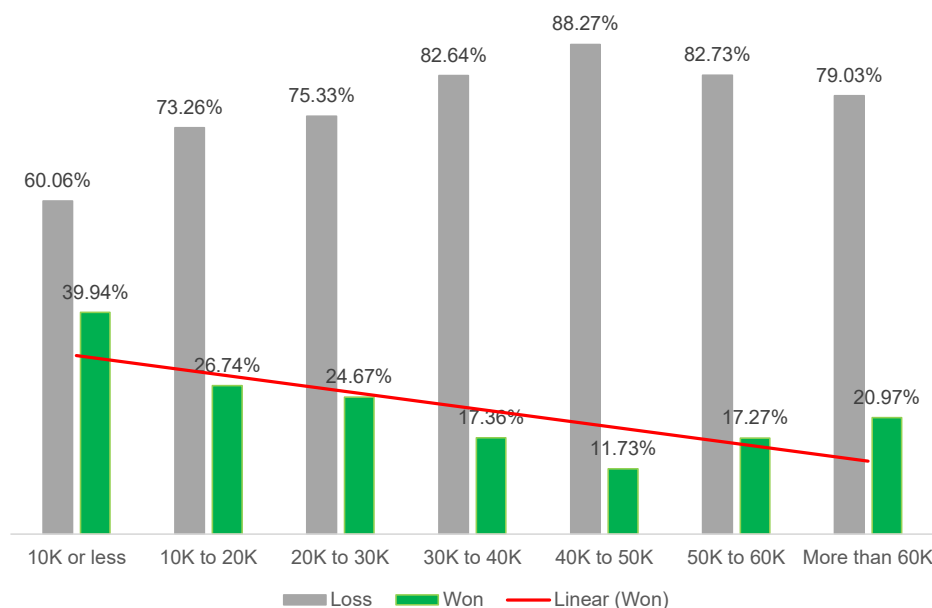


PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN OPPORTUNITY SIZING:

- ❑ Focus on Opportunities sized 40K to 50K, they have the lowest win rate at 17.36%.
- ❑ Increase focus on lower sized opportunities (**10K or less**) as they the highest win rate of 39.94%.
- ❑ Enhance win rates for opportunities sized **10K to 20K** and **20K to 30K**, which currently have lower win rates (26.74% and 24.67%, respectively).
- ❑ Investigate reasons for losses in these categories and implement targeted strategies to address them.
- ❑ **Allocate resources to optimize marketing and sales tactics for higher opportunity sizes (30K to 60K or more).**

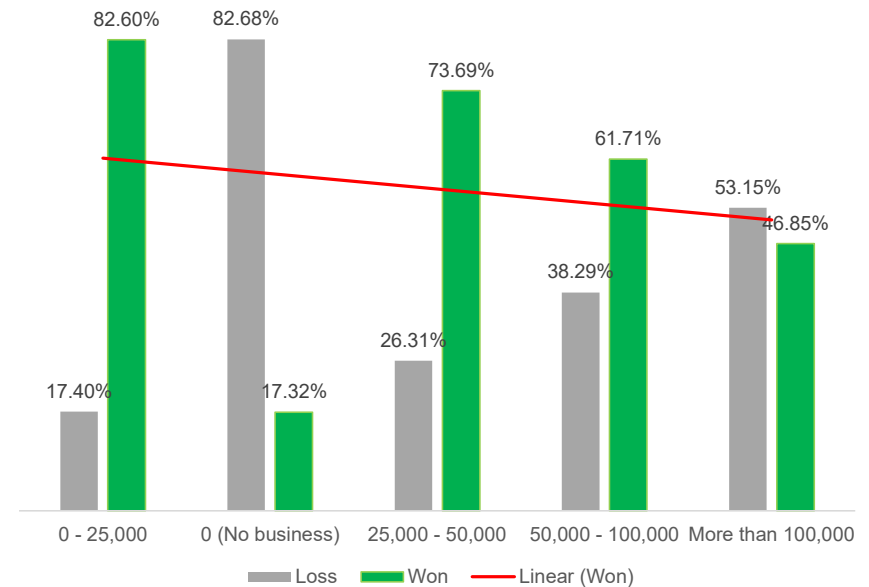


PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN BUSINESS WITH CLIENT LAST YEAR:

- ❑ The company should prioritize clients with some business history, focusing on those with **0-25,000** or **25,000-50,000**, which also shows a strong win rate (73.69%).
- ❑ opportunities with clients who had **0-25,000** business last year have the **highest win rate (82.60%)**. Conversely, clients with no prior business have the highest loss rate (82.68%).
- ❑ Implementing tailored engagement and retention strategies for these segments could significantly improve overall win rates and business growth.
- ❑ **Targeted efforts to convert clients with no previous business could help reduce the high loss rate as this segment have the highest opportunities volume.**

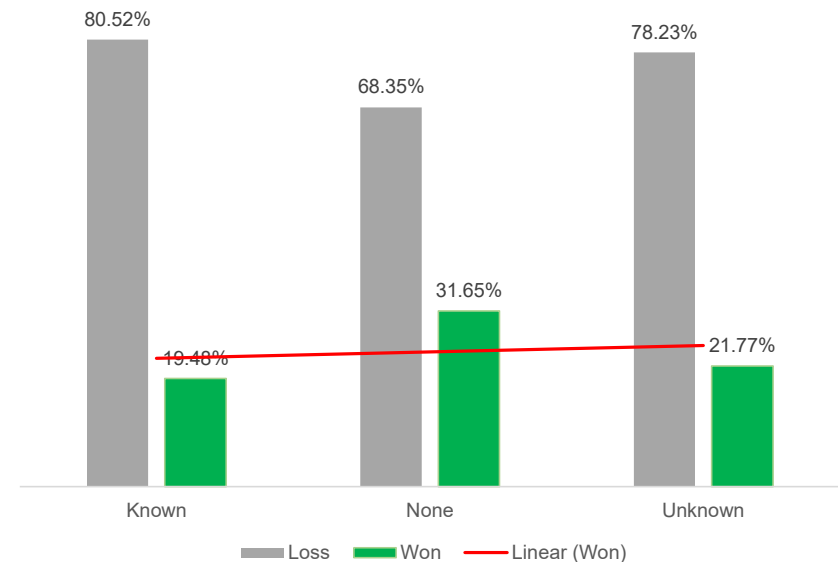


PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN COMPETE INTEL:

- ❑ focus on improving strategies for **"Known"** opportunities, which have the highest loss rate (80.52%) and the lowest win rate (19.48%). Analyze the reasons behind these losses and implement targeted solutions.
- ❑ Leverage successful tactics from the **"None"** category, which has the highest win rate (31.65%), to replicate its success in other categories.
- ❑ Investigate the **"Unknown"** opportunities to uncover potential areas for improvement.
- ❑ **"Unknown"** Opportunities have highest total opportunity count (56724) and the **"None"** category has the lowest opportunities volume (9257)
- ❑ A large portion of opportunities in the "Unknown" category suggests gaps in data collection or reporting processes.
- ❑ Identify the gaps in data collection and reporting processes and focus on improving the win rates for the "unknown" opportunities.



PART III B : Presenting Findings

Sales Pipeline Conversion at a SaaS Startup

IMPROVEMENTS IN COMPETE INTEL:

Conclusion

- The comprehensive dataset analysis reveals key strategic insights for the company. Given Pune's high loss percentage (81.12%), focus on local market dynamics and optimize marketing strategies, leveraging successful tactics from Mumbai (win rate 25.37%) for improvement.
- Address challenges in Legacy Modernization (12.15%-win rate) while leveraging strengths in ERP Implementation and Analytics. Improve conversion rates for Online Leads (6.46%-win rate) by adopting Enterprise Sellers' strategies (27.57%-win rate).
- Prioritize opportunities sized 40K to 50K, with the highest loss rate (11.73%).
- Focus on clients with previous business (0-25,000) to boost retention and engagement.
- Enhance strategies for "Known" opportunities (80.52% loss rate) and emulate successes from the "None" category (31.65%-win rate).

Implementing these recommendations will optimize resource allocation, improve win rates, and strengthen the company's market presence and overall success.