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SALES PIPELINE

Sales Pipeline is the process by which an organization converts its sales opportunities (or leads) into sales.

The Tableau Accelerator allows you to:

- Conduct overall sales pipeline review
- Assess and improve your sales performance:
 - Pipeline generation
 - Ability to convert opportunities
- Understand & grow each opportunity owner's profile (based on profiling & recommended trainings)
- Breakdown your pipeline at any level of detail
- Focus your efforts on areas with best conversion
- Assess performance improvements over time
- Drill-back at Opportunity level of detail, directly in your Sales Pipeline Application and take immediate actions

Answer key business questions

- What is the size of our sales pipeline: overdue, short, medium, and long term?
- What was our ability to convert opportunities?
- Which opportunities do we have in our sales pipeline? Which opportunities do we win the most?
- How is our sales pipeline composed?
- Which account(s) drive our ability to convert opportunities?

Monitor and improve KPIs

Open opportunities

- **Pipeline Value:** Total amount of open opportunities (expressed in currency)
- **Nb of Open Opportunities:** Number of opportunities that are currently open

All opportunities

- **Total Closed Opportunities Amount:** Total amount of opportunities that are closed (expressed in currency)
- **Nb of Opportunities:** Total number of opportunities (open or closed)
- **Avg Opportunity Size:** Average amount of opportunities, whether they are open or closed (expressed in currency)

Closed opportunities

- **Total Closed Opportunities Amount:** Total amount of opportunities that are closed (expressed in currency)
- **Total Sales:** Total amount of opportunities won (expressed in amount)
- **Nb of Closed Opportunities:** Number of opportunities that are closed
- **Nb of Won Opportunities:** Number of opportunities that were won
- **Nb of Lost Opportunities:** Number of opportunities that were lost
- **Sales Cycle:** Average time it takes to close an opportunity (only considering won opportunities)
- **Sales Cycle (won):** Average time it takes to win an opportunity
- **Sales Cycle (lost):** Average time it takes to close an opportunity (only considering lost opportunities)
- **Avg Deal Size (won):** Average amount of won opportunities (expressed in currency)

Performance

- **Won/Lost Rate:** Share of the number of opportunities won in relation to the number of all closed opportunities (expressed in %)
- **Conversion Rate:** Share of the amount of opportunities won in relation to the amount of all closed opportunities (expressed in %)
- **Sales Velocity:** Determines how fast you are making money (you bring back about that much every day) (expressed in currency)

Required attributes

- **Opportunity Id** (*string*): Opportunity Unique Identifier
- **Account** (*string*): Customer/Prospect name
- **Opportunity Owner** (*string*): Owner of the opportunity
- **Opportunity Type** (*string*): Type of Opportunity
- **Opportunity Description** (*string*): Opportunity Description
- **Opportunity Stage** (*string*): Opportunity Stage (according to your standards)
- **Open Flag** (*string*) ← expected values: 'Y', 'N'. 'Y' means the opportunity is Open.
- **Won Flag** (*string*) ← expected values: 'Y', 'N'. 'Y' means the opportunity is Closed and Won.
- **Created Date** (*date*): Opportunity Creation Date
- **(Estimated) Closed Date** (*date*): Actual Closed Date is the opportunity is Closed, else Estimated Close Date
- **Amount** (*numeric*): Opportunity Amount