Change in Expected Revenue By Opportunity Change State



Custom Sales Pipeline Analytics Tool

Project Overview

- 2 month project, full-time. 2023
- London-based scale-up
- Working with newly-created RevOps team (supporting 25 person sales team)
- Involved: data viz, automated data pipelines, complex data transformations, API integrations, metric design, long-term data storage and archiving, advanced Airtable data architecture

Tools Used

Parabola.io

Airtable

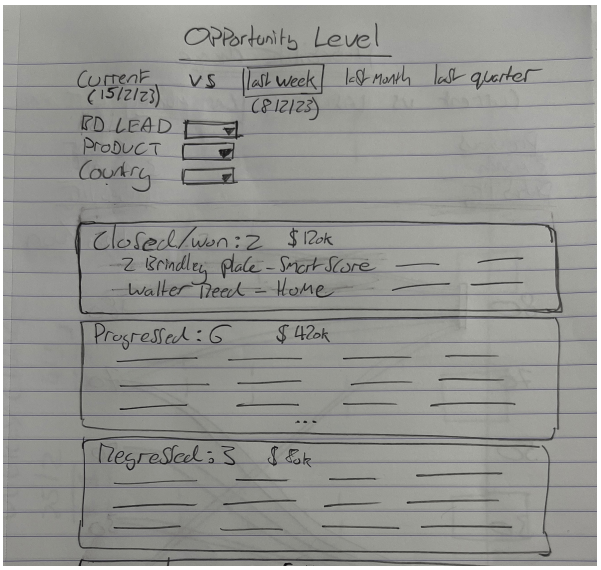
Salesforce

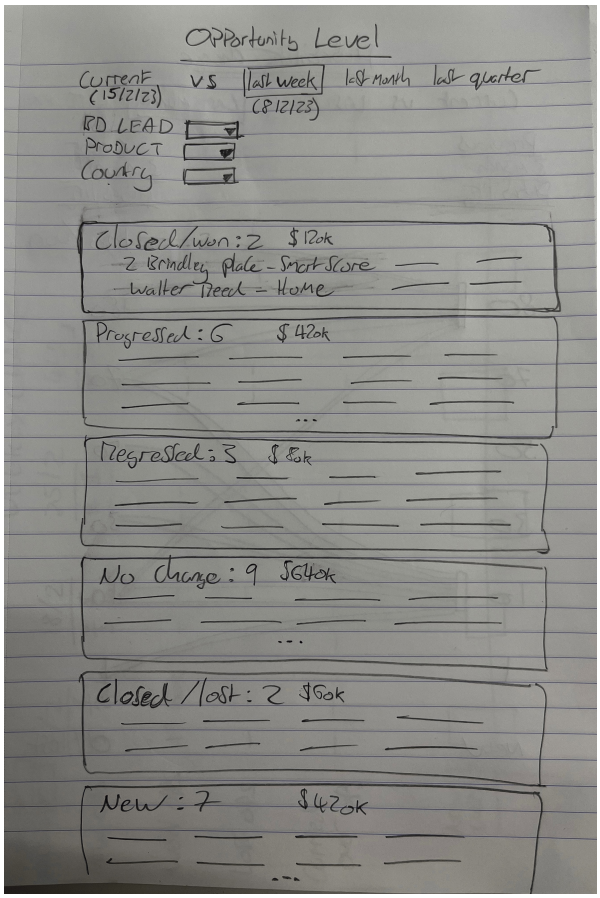
Project goal

The client wanted to build a fully customised analytics tool which would help them visualise and track progress of sales opportunities as they were progressing through their sales pipeline. e.g.

- Visualise total sales pipeline value at date in the past compared to today (-7d, -28d, Quarter start, etc)
- Breakdown reasons why sales pipeline is ahead / behind target
- Cohort analysis: e.g. for all the sales opportunities on 1st Jan, keep a live view of whether they are stuck / progressing / changing in value / etc over time
- Zoom into any single sales opportunity to see its history
- Dashboards should be fully filterable e.g. by sales rep, country, product etc
- Store sales pipeline history long term to support future analysis

Initial Sketches





Solution

I built the client an entirely NoCode solution (Airtable and Parabola.io) which took daily snapshots of the Salesforce sales pipeline (~1,500 records). This solution incorporated:

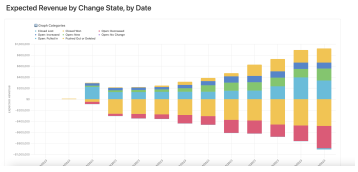
- API integration to Salesforce
- Long-term data storage
- Automated some very complex sequences of data transformations and analytical logic
- A custom-designed data architecture in Airtable to handle visualising everything on one dashboard that could be easily filtered, and kept up to date automatically
- Two types of dashboard, both with many charts, tables and metrics.
- Dashboards included: cohort analysis, sales projections, x-metric filters, breakdowns of sales pipeline progress and movement

After the initial requirements gathering phase, this took 4-5 weeks to build, including handover to an analyst in the company.

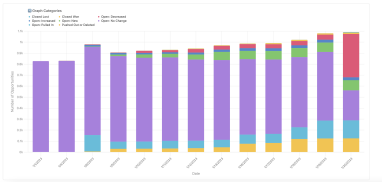
Final product



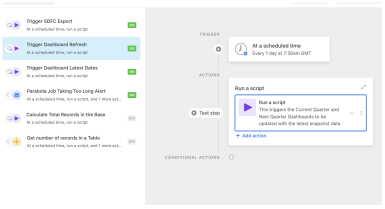
Graphs



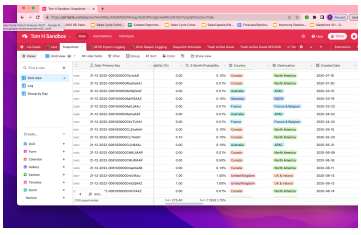
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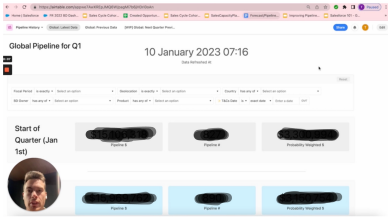
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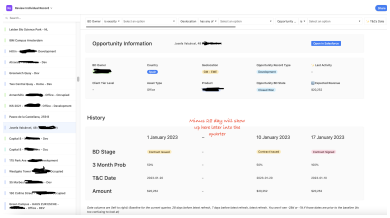
Automations in Airtable



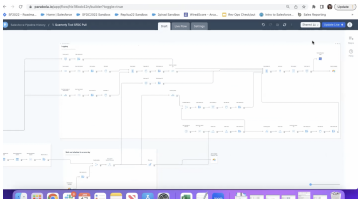
Airtable data architecture



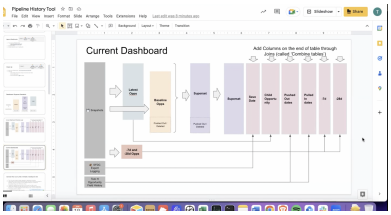
Final dashboard



Record level view



Parabola.io for data automation



Documentation & training