

CLEARER FUNNEL VISIBILITY, BETTER FORECASTING —

# Understanding SQL to Opportunity Conversion Rate by Email

## The Challenge

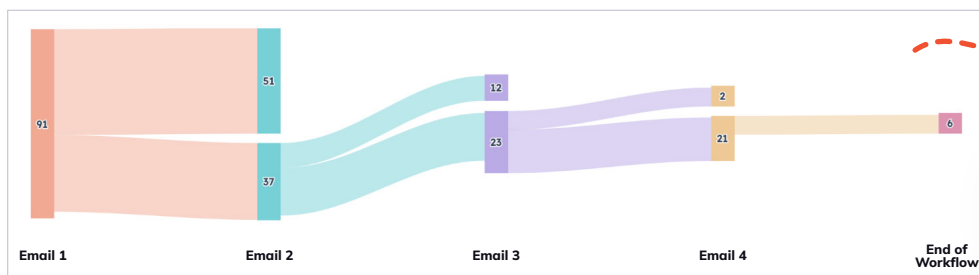
The client struggled with:

- Unclear SQL-to-opportunity conversion rates, leading to unreliable forecasting
- No visibility into the number of contacts at each funnel stage, making it hard to spot bottlenecks
- No easy way to compare current funnel data to historical performance, leaving trends unnoticed
- Difficulty forecasting upcoming conversions, putting revenue targets at risk

## The Solution

We implemented a custom solution with Journey Analytics Reporting.

- Set up SQL-to-Opportunity funnels segmented by marketing source
- Mapped out each step in the email drip campaign, tracking the journey from receiving the first email to booking a meeting and becoming an Opportunity
- Used Journey reporting to link emails with “exits” at each step, creating a clear view of the conversion rate by email for each funnel
- Leveraged Marketing email activities data and custom reporting to identify contacts waiting in each delay period, allowing calculation of expected upcoming conversion



## The Details

**Industry:**

Think Tanks

**Business Area:**

Sales

**Tools Used:**

- Journey Analytics Reporting

### Email 1

CONTACTS THAT WILL RECEIVE EMAIL 1 IN NEXT 2 DAYS

4

### Email 2

CONTACTS THAT WILL RECEIVE EMAIL 2 IN NEXT 2 DAYS

2

### Email 3

CONTACTS THAT WILL RECEIVE EMAIL 3 IN NEXT 2 DAYS

1

## The Impact

“It’s super helpful to see this all by channel.”

- Client can now accurately forecast the number of contacts likely to convert in the upcoming days
- Better visibility into funnel performance, allowing better business management decisions, such as staffing and budget adjustments
- New reporting capabilities, providing valuable insights to business leaders

