

# Leading To The Right Lead: Helping an Intelligence Market Company Prioritize Its Leads

DS4A Empowerment - Team 23

Amanda Cavalcanti | Stacy Saint Paul | Stela Poli | Susanah Diniz | Thainá Souza

## Client

Leading Growth Intelligence  
SaaS Company in Latin America

Assists enterprise customers  
increase customer growth

Provides markets understanding and improves  
customer's competitive positioning

## Problem

Improve client's sales engine

Optimize lead generation resources

Define a lead prioritization algorithm

Increase lead conversion rate

## Current approach

Reach out to high tier clients

## Solution

Provide overview of client's lead dataset

Define set of rules to predict sales  
outcomes based on previous leads

## Data

Client's Customer Relationship Management (CRM)  
data information, including a view of the entire sales  
funnel, from the years 2020 and 2021.

Each row had a set of variables that represented a step  
in the sales attempt, including a current status that  
could be "win", "lost" and "open".

Only the rows with "win" and "lost" status were used.

## Challenges

Domain-specific  
language

Very small  
dataset

Dataset in  
Portuguese

Only 780 rows  
available after  
cleaning

Unbalanced  
dataset

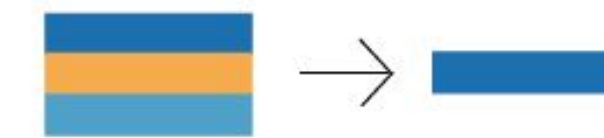
Lack of  
Standardization

## Variables That Impact Final Status

Tier | Sector | Product  
Old x New Client | Origin Action

## Method

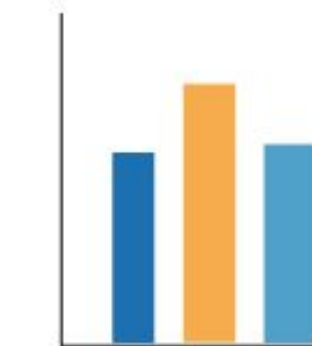
1 - Select only 1 row per lead



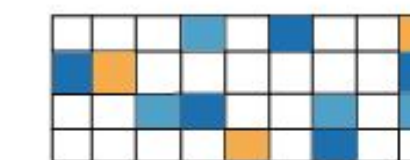
2 - Standardize data

My House, my house -> My house

3 - Explore data through charts



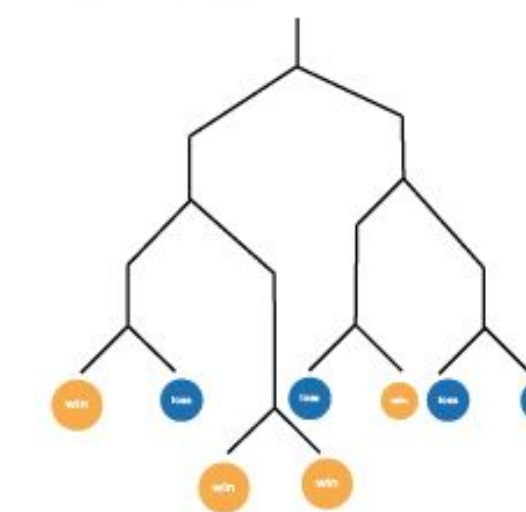
4 - Build contingency tables



5 - Perform hypothesis testing

H0: Things are equal  
H1: Things are not equal

6 - Build Lead Scoring  
Algorithm



## Highlights

Client needs: optimize lead generation resources and  
improve client's sales engine.

What is proposed: Define a lead prioritization algorithm

## Findings

Clients of all tiers buy products at a similar rate

Different point of contact job positions -> same conversion

One product has a higher conversion rate than others

Different Lead Origin -> progressing through the sales  
funnel in different ways

Clients from particular sectors are approached to buy one  
product more frequently than others

The Services Industry consistently buys all products

## Common reasons of loss

wrong timing, no pain addressed by the product, price

## Recommendations

Investigate why one product has a higher conversion rate

Investigate which Lead Origin leads to more sales and why

Approach Small, Midsize Business companies more often

Record the reasons clients choose to buy their products

Rethink strategy for approaching new clients.

Standardize data from before 2020 to improve the training of  
the model by adding more data

Balance the dataset and apply more robust decision tree  
algorithms to build a better win-loss predictor