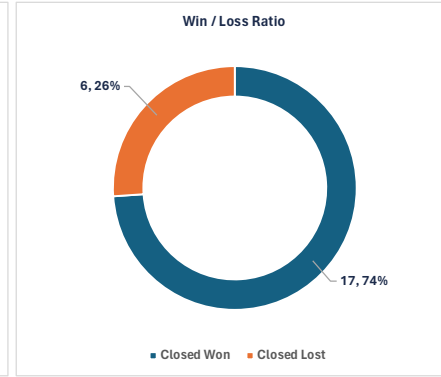
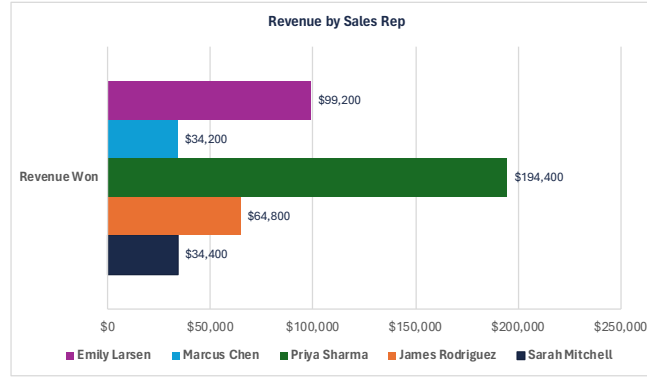
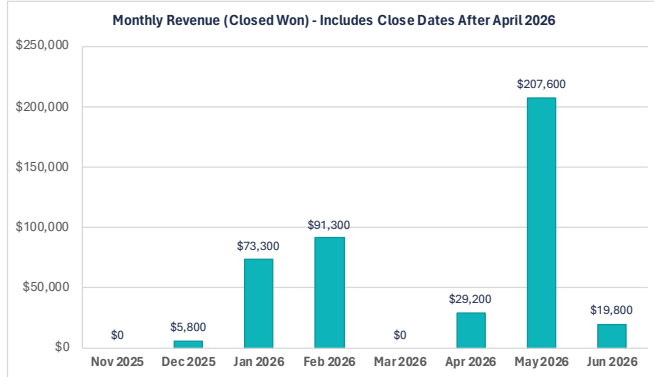


Sales Performance Dashboard

B2B SaaS Pipeline & Revenue Analytics | Nov 2025 – Apr 2026

Total Revenue (Won)	Deals Won	Deals Lost	Win Rate	Avg Deal Size (Won)	Pipeline Value
\$427,000	17	6	74%	\$25,118	\$6,117,400



Additional Metrics

Avg Sales Cycle (Days)	Total Pipeline Deals	Avg Pipeline Deal Value	Overall Conversion Rate	Total Leads Generated	MRR (est.)
55	127	\$48,169	11%	150	\$35,583

Insights

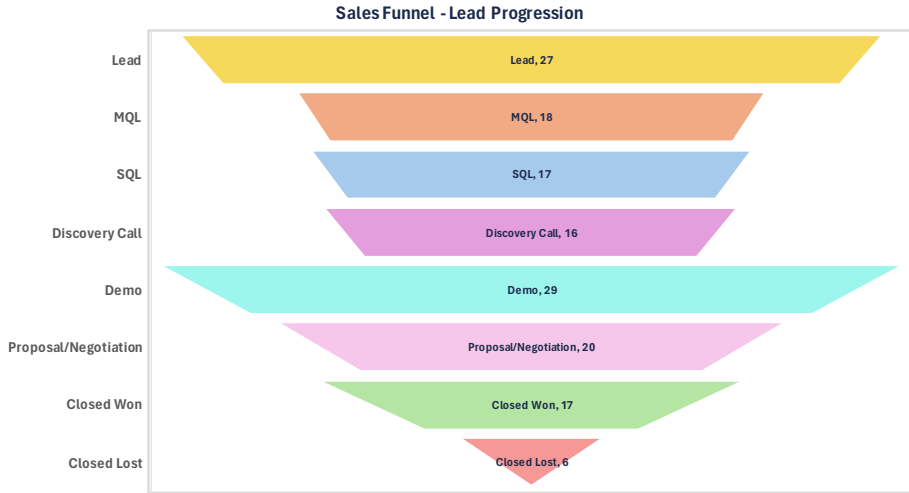
- Revenue is concentrated in Jan-Feb 2026 (\$73.3K and \$91.3K), which together account for 38.6% of total bookings. Nov 2025 and Mar 2026 recorded \$0 in closed revenue — indicating either seasonal slowdowns or pipeline timing gaps that warrant investigation.
- Priya Sharma leads revenue at \$194.4K from just 3 deals, driven by high-value Enterprise closes. In contrast, Marcus Chen and Emily Larsen each closed 5 deals but at lower average deal sizes (\$6.8K and \$19.8K respectively). **Coaching Sharma's large-deal playbook across the team could lift overall ACV.**
- Emily Larsen holds a perfect 100% win rate — every deal she took to decision converted. While the sample is small, **her qualification and closing approach may be worth studying and replicating** across the team.
- The 55-day average sales cycle is healthy for B2B SaaS, but 127 deals remain in active pipeline with an average value of \$48.2K each. If cycle times extend, this **backlog could create quarter-end compression**. Monitor aging deals closely.
- At \$35.6K estimated MRR from \$427K in total bookings, the current run rate annualizes to ~\$427K ARR. With \$6.1M in pipeline and a 73.9% historical win rate, there is **significant growth potential — but only if mid-funnel conversion (Demo → Proposal) improves** from its current 59.7%.
- The 3:1 win-to-loss ratio (17 won vs. 6 lost) is strong, but 84.7% of all leads have not yet reached a decision. **Accelerating pipeline velocity — not just win rate — is the key lever for revenue growth in the next quarter.**

How to Read This Dashboard

- Total Revenue**: Sum of deal values for all Closed Won opportunities. Reflects actual bookings, not pipeline.
- Win Rate**: Closed Won + (Closed Won + Closed Lost). Measures sales effectiveness for deals that reached a decision. Active pipeline deals are excluded.
- Pipeline Value**: Total deal value of all active opportunities (not yet Closed Won or Lost). Represents potential future revenue.
- Avg Sales Cycle**: Average days from lead creation to close for won deals. Shorter cycles indicate more efficient sales processes.
- MRR (est.)**: Estimated Monthly Recurring Revenue = Total Won Revenue + 12. Assumes annual contracts with equal monthly recognition.
- Monthly Revenue**: Revenue recognized by close date month. Identifies trends, seasonality, and acceleration/deceleration.
- Rep Performance**: Revenue contribution by individual rep. Use alongside win rate and deal count for balanced performance assessment.
- Win/Loss Ratio**: Visual split of closed outcomes. Monitor for trends — a declining win rate may signal qualification issues or market shifts.

CRM Sales Funnel Analysis

Lead Progression & Conversion Rates | Nov 2025 – Apr 2026



Insights

- The biggest drop-off occurs between Demo and Proposal/Negotiation, where conversion falls to 59.7%. This suggests prospects are engaged enough to attend demos but stall before committing to formal proposals — a potential pricing, ROI communication, or champion enablement gap.
- The Demo stage holds the most leads (29, or 19.3% of all leads), indicating a bottleneck. Sales reps may be scheduling demos faster than they can move deals through negotiation. Consider whether demo quality or post-demo follow-up needs tightening.
- Lead-to-MQL conversion sits at 82%, which is strong for B2B SaaS. However, only 11.3% of all leads ultimately close — the overall funnel yield. Focus on mid-funnel acceleration (SQL → Demo) to improve this ratio.
- Closed Won deals average \$25,118 while the overall pipeline averages \$48,169 per deal. Larger deals are concentrated in active pipeline stages, signaling potential upside if Enterprise-tier opportunities convert.
- With \$6.1M in active pipeline value and a 73.9% win rate on decided deals, the weighted pipeline (pipeline × historical win rate) suggests ~\$4.5M in expected future revenue, assuming current conversion patterns hold.

How the Funnel Works

Lead	Inbound or outbound prospect enters the CRM. No qualification yet — raw contact captured from website, event, referral, or outreach.
MQL (Marketing Qualified)	Lead engages with content, downloads resources, or meets scoring criteria. Marketing validates fit before passing to Sales.
SQL (Sales Qualified)	Sales rep confirms budget, authority, need, and timeline (BANT). Lead is accepted as a genuine opportunity.
Discovery Call	First structured conversation. Rep explores pain points, current solutions, and decision-making process.
Demo	Product demonstration tailored to the prospect's use case. Technical fit and feature alignment are validated.
Proposal / Negotiation	Formal pricing proposal sent. Terms, scope, and contract details are negotiated with stakeholders.
Closed Won	Deal signed, contract executed. Revenue recognized and customer onboarded.
Closed Lost	Opportunity did not convert. Reasons tracked for win/loss analysis (budget, timing, competition, no decision).

Lead ID	Company Name	Contact	Email	Lead Source	Sales Rep	Funnel Stage	Deal Value	Created Date	Close Date	Days in Pipeline	Product/Plan Tier
LD-1001	WildCard Digital	Cassey Chen	cassey.chen@wildcarddigital.com	Event/Website	Piya Sharma	Demo	\$4,300	2025-11-27		143	Professional
LD-1002	TeamForge	Morgan Diaz	morgan.diaz@teamforge.com	Outbound - LinkedIn	Sarah Mitchell	Lead	\$5,000	2026-03-10		40	Starter
LD-1003	AeroVault	Sam Johnson	sam.johnson@aerovault.com	Outbound - LinkedIn	James Rodriguez	Proposal/Negotiation	\$23,300	2026-11-02		168	Professional
LD-1004	PulsePoint Media	Emery Rivera	emery.rivera@pulsepointmedia.com	Outbound - Cold Email	James Rodriguez	Lead	\$9,900	2025-11-27		143	Starter
LD-1005	Quantum Logic	Cameron Singh	cameron.singh@quantumlogic.com	Referral	Piya Sharma	Lead	\$123,000	2026-03-18		33	Enterprise
LD-1006	CoreSync	Morgan Johnson	morgan.johnson@coresync.com	Outbound - Cold Email	Emery Rivera	Proposal/Negotiation	\$86,200	2025-12-20		120	Enterprise
LD-1007	DataStream Labs	Avery Tanaka	avery.tanaka@datastreamlabs.com	Outbound - Website	James Rodriguez	Demo	\$88,000	2026-02-26		4	Professional
LD-1008	VelocityAI	Riley Singh	riley.singh@velocityai.com	Outbound - Cold Email	James Rodriguez	Lead	\$36,100	2026-04-15		4	Professional
LD-1009	WildCard Digital	Riley Johnson	riley.johnson@wildcarddigital.com	Event/Website	James Rodriguez	Demo	\$6,400	2026-04-13		4	Starter
LD-1010	StatoSphere Co	Blake Patel	blake.patel@statosphere.com	Inbound - Content	Sarah Mitchell	SQL	\$90,100	2026-01-11		153	Enterprise
LD-1011	DeepRoot Systems	Blake Okfor	blake.okfor@deeprootsystems.com	Event/Website	Marcus Chen	Lead	\$42,400	2026-02-26		52	Professional
LD-1012	SynWave Digital	Avery Johnson	avery.johnson@synwavedigital.com	Referral	Piya Sharma	SQL	\$27,900	2026-03-30		20	Professional
LD-1013	StatoSphere Co	Taylor Ali	taylor.ali@statosphere.com	Outbound - LinkedIn	Sarah Mitchell	Demo	\$136,100	2025-12-10		130	Demo
LD-1014	Thunderbolt AI	Emery Foster	emery.foster@thunderboltai.com	Inbound - Website	Marcus Chen	SQL	\$44,900	2026-03-16		29	Professional
LD-1015	AeroVault	Alex Kim	alex.kim@aerovault.com	Event/Website	Emery Rivera	Discovery Call	\$126,900	2026-01-27		82	Enterprise
LD-1016	VelocityAI	Parker Johnson	parker.johnson@velocityai.com	Inbound - Content	Francis Chen	Closed Won	\$5,800	2025-11-11	2025-12-21	40	Starter
LD-1017	GreenLeaf Software	Dakota Larsen	dakota.larsen@greenleafsoftware.com	Referral	Emery Rivera	Closed Won	\$17,400	2025-11-13	2026-01-05	58	Professional
LD-1018	SummitEdge Tech	Harper Chen	harper.chen@summitedgetech.com	Inbound - Website	Piya Sharma	SQL	\$133,200	2026-01-18		91	Enterprise
LD-1019	ClearView Analytics	Parker Garcia	parker.garcia@clearviewanalytics.com	Inbound - Website	Marcus Chen	Proposal/Negotiation	\$147,800	2026-03-17		33	Enterprise
LD-1020	MapInfoTech	Logan Chen	logan.chen@mapinfotech.com	Referral	Piya Sharma	Closed Won	\$7,400	2025-12-26	2026-01-15	21	Starter
LD-1021	OceanBridge	Drew Murphy	drew.murphy@oceanbridge.com	Event/Website	Piya Sharma	SQL	\$30,500	2025-12-01		139	Professional
LD-1022	NoGen Systems	Blake Chen	blake.chen@nogen.com	Referral	Emery Rivera	Proposal/Negotiation	\$5,000	2025-11-19		151	Starter
LD-1023	CloudPeak Solutions	Avery Garcia	avery.garcia@cloudpeaksolutions.com	Inbound - Website	Piya Sharma	SQL	\$5,100	2026-03-05		45	Starter
LD-1024	SynWave Digital	Parker Diaz	parker.diaz@synwavedigital.com	Outbound - LinkedIn	James Rodriguez	Lead	\$130,700	2025-12-19		121	Enterprise
LD-1025	Coastal Analytics	Emery Singh	emery.singh@coastalanalytics.com	Outbound - LinkedIn	Marcus Chen	Closed Lost	\$36,900	2026-04-17	2026-05-13	28	Professional
LD-1026	CloudPeak Solutions	Dakota Rivera	dakota.rivera@cloudpeaksolutions.com	Partner Channel	Sarah Mitchell	Lead	\$4,700	2026-02-23		56	Starter
LD-1027	Nimbus Ops	Quinn Kim	quinn.kim@nimbusops.com	Outbound - Content	Quinn Kim	SQL	\$40,000	2026-01-26		60	Professional
LD-1100	SilverLake SaaS	Emery Park	emery.park@silverlakesaas.com	Inbound - Website	Marcus Chen	Closed Won	\$6,000	2025-11-27	2026-01-22	56	Starter
LD-1029	PulsePoint Media	Dakota Chen	dakota.chen@pulsepointmedia.com	Outbound - LinkedIn	Piya Sharma	SQL	\$128,500	2026-01-13		96	Enterprise
LD-1030	MapInfoTech	Logan Patel	logan.patel@mapinfotech.com	Inbound - Website	James Rodriguez	Proposal/Negotiation	\$11,700	2025-12-29		23	Professional
LD-1031	CloudPeak Solutions	Blake Patel	blake.patel@cloudpeaksolutions.com	Inbound - Website	Emery Rivera	Lead	\$42,600	2026-03-16		34	Professional
LD-1032	Obsidian Platforms	Morgan Schmidt	morgan.schmidt@obsidianplatforms.com	Inbound - Website	Emery Rivera	Lead	\$10,800	2026-02-12		66	Starter
LD-1033	Obsidian Platforms	Avery Diaz	avery.diaz@obsidianplatforms.com	Outbound - LinkedIn	James Rodriguez	Discovery Call	\$27,600	2026-02-20		20	Professional
LD-1034	SummitEdge Tech	Quinn Okfor	quinn.okfor@summitedgetech.com	Event/Website	Piya Sharma	SQL	\$6,600	2026-04-15		4	Starter
LD-1035	SummitEdge Tech	Morgan Chen	morgan.chen@summitedgetech.com	Outbound - LinkedIn	Emery Rivera	Discovery Call	\$149,600	2025-11-19		151	Enterprise
LD-1036	Obsidian Platforms	Quinn Nguyen	quinn.nguyen@obsidianplatforms.com	Outbound - Cold Email	Sarah Mitchell	SQL	\$87,000	2025-12-11		129	Enterprise
LD-1122	GreenLeaf Software	Drew Chen	drew.chen@greenleafsoftware.com	Referral	Emery Rivera	Closed Won	\$5,000	2025-11-13	2026-01-29	73	Professional
LD-1038	SynWave Digital	Quinn Kim	quinn.kim@synwavedigital.com	Inbound - Website	Emery Rivera	Proposal/Negotiation	\$5,500	2025-12-24		116	Starter
LD-1039	Evergen SaaS	Quinn Ali	quinn.ali@evergensaas.com	Outbound - LinkedIn	Piya Sharma	Demo	\$134,600	2025-11-24		146	Enterprise
LD-1040	Catalyst Dynamics	Jordan Chen	jordan.chen@catalystdynamics.com	Outbound - Cold Email	James Rodriguez	Discovery Call	\$11,900	2026-02-22		43	Professional
LD-1041	Pincode Systems	Logan Chen	logan.chen@pincode.com	Inbound - Website	Sarah Mitchell	Closed Won	\$119,100	2025-12-09		131	Enterprise
LD-1095	WildCard Digital	Parker Okfor	parker.okfor@wildcarddigital.com	Outbound - LinkedIn	Sarah Mitchell	Discovery Call	\$34,400	2026-01-08	2026-01-31	23	Professional
LD-1043	Thunderbolt AI	Avery Kim	avery.kim@thunderboltai.com	Outbound - Cold Email	James Rodriguez	Proposal/Negotiation	\$96,000	2026-01-09		48	Enterprise
LD-1044	ClearView Analytics	Riley Schmidt	riley.schmidt@clearviewanalytics.com	Outbound - LinkedIn	Sarah Mitchell	Discovery Call	\$11,300	2026-02-14		64	Starter
LD-1045	PrismLogic	Avery Larsen	avery.larsen@prismlogic.com	Inbound - Content	Sarah Mitchell	SQL	\$16,200	2026-03-01		49	Professional
LD-1046	Redwood Analytics	Cameron Tanaka	cameron.tanaka@redwoodanalytics.com	Partner Channel	James Rodriguez	SQL	\$8,500	2026-02-11		67	Starter
LD-1047	NoGen Systems	Quinn Singh	quinn.singh@nogen.com	Inbound - Content	Marcus Chen	SQL	\$44,400	2026-01-18		32	Professional
LD-1048	TechNova Inc	Cassey Larsen	cassey.larsen@technovainc.com	Inbound - Content	Emery Rivera	Demo	\$76,500	2025-11-28		142	Enterprise
LD-1049	Innov8Data	Blake Costa	blake.costa@innov8data.com	Referral	Emery Rivera	SQL	\$11,100	2025-12-19		121	Starter
LD-1050	OceanBridge	Emery Chen	emery.chen@oceanbridge.com	Referral	Emery Rivera	SQL	\$43,200	2025-12-21		110	Professional
LD-1051	NoGen Systems	Blake Foster	blake.foster@nogen.com	Outbound - Cold Email	Sarah Mitchell	Demo	\$24,000	2026-01-19		90	Professional
LD-1052	SummitEdge Tech	Dakota Tanaka	dakota.tanaka@summitedgetech.com	Referral	James Rodriguez	Demo	\$9,000	2026-02-06		72	Starter
LD-1053	Nimbus Ops	Quinn Garcia	quinn.garcia@nimbusops.com	Outbound - Cold Email	Marcus Chen	SQL	\$15,000	2026-01-13		88	Professional
LD-1054	SilverLake SaaS	Reese Rivera	reese.rivera@silverlakesaas.com	Outbound - LinkedIn	Marcus Chen	Proposal/Negotiation	\$21,400	2026-03-02		48	Professional
LD-1055	PrismLogic	Riley Garcia	riley.garcia@prismlogic.com	Outbound - Cold Email	Emery Rivera	Proposal/Negotiation	\$33,600	2025-11-24		148	Professional
LD-1056	AmLight Data	Avery Tanaka	avery.tanaka@amlightdata.com	Inbound - Content	James Rodriguez	Demo	\$3,400	2026-03-02		48	Starter
LD-1057	Coastal Analytics	Harper Weber	harper.weber@coastalanalytics.com	Outbound - LinkedIn	Emery Rivera	SQL	\$9,600	2026-02-07		51	Starter
LD-1058	NovoHealth	Alex Kim	alex.kim@novohealth.com	Partner Channel	Marcus Chen	Discovery Call	\$10,200	2026-03-13		37	Starter
LD-1059	AeroVault	Avery Kim	avery.kim@aerovault.com	Outbound - LinkedIn	James Rodriguez	Demo	\$116,800	2026-03-24		26	Enterprise
LD-1020	SynWave Digital	Harper Johnson	harper.johnson@synwavedigital.com	Outbound - Content	Piya Sharma	Closed Won	\$33,200	2025-11-28	2026-02-02	35	Professional
LD-1061	NovoWare	Quinn Brown	quinn.brown@novoware.com	Partner Channel	Piya Sharma	SQL	\$102,100	2026-04-10		9	Enterprise
LD-1062	NoWave	Morgan Tanaka	morgan.tanaka@nowave.com	Inbound - Content	Piya Sharma	Lead	\$101,100	2026-11-21		149	Starter
LD-1063	StatoSphere Co	Dakota Nguyen	dakota.nguyen@statosphere.com	Outbound - LinkedIn	James Rodriguez	SQL	\$6,700	2026-03-13		51	Starter
LD-1064	CloudPeak Solutions	Sam Costa	sam.costa@cloudpeaksolutions.com	Outbound - LinkedIn	Emery Rivera	SQL	\$52,000	2026-03-28		22	Enterprise
LD-1065	Acme Corp	Cameron Tanaka	cameron.tanaka@acmecorp.com	Partner Channel	Marcus Chen	Discovery Call	\$145,300	2026-02-16		62	Enterprise
LD-1066	PrismLogic	Logan Foster	logan.foster@prismlogic.com	Inbound - Content	Marcus Chen	SQL	\$6,500	2025-11-08		163	Starter
LD-1067	Coastal Analytics	Dakota Schmidt	dakota.schmidt@coastalanalytics.com	Referral	Marcus Chen	Lead	\$148,100	2026-03-17		43	Enterprise
LD-1068	TruNorth Software	Parker Diaz	parker.diaz@trunorthsoftware.com	Event/Website	Sarah Mitchell	SQL	\$6,900	2026-02-27		51	Starter
LD-1069	Horizon Labs	Dakota Rivera	dakota.rivera@horizonlabs.com	Inbound - Content	Marcus Chen	SQL	\$9,900	2026-02-06		72	Starter
LD-1070	Rivera Digital	Quinn Garcia	quinn.garcia@riveradigital.com	Outbound - LinkedIn	Sarah Mitchell	SQL	\$16,600	2026-01-01		103	Professional
LD-1071	NovoGen Systems	Jordan Chen	jordan.chen@novogen.com	Inbound - Content	James Rodriguez	Lead	\$112,100	2026-01-01		108	Enterprise
LD-1072	Coastal Analytics	Cassey Diaz	cassey.diaz@coastalanalytics.com	Inbound - Content	Marcus Chen	Demo	\$38,000	2025-12-13		127	Professional
LD-1073	PrismLogic	Cassey Schmidt	cassey.schmidt@prismlogic.com	Outbound - Cold Email	Sarah Mitchell	SQL	\$42,900	2026-02-26		22	Professional
LD-1074	CoreSync	Dakota Okfor	dakota.okfor@coresync.com	Inbound - Website	Emery Rivera	Demo	\$33,800	2025-11-27		143	Professional
LD-1075	Alpine Cloud	Reese Kim	reese.kim@alpinecloud.com	Partner Channel	Emery Rivera	Demo	\$84,700	2026-02-18		60	Enterprise
LD-1076	NoGen Systems	Ka Rivera	ka.rivera@nogen.com	Inbound - Website	Marcus Chen	Demo	\$60,600	2026-02-01		77	Enterprise
LD-1077	Redwood Analytics	Blake Costa	blake.costa@redwoodanalytics.com	Inbound - Content	Emery Rivera	Proposal/Negotiation	\$77,000	2026-03-18		43	Enterprise
LD-1078	Redwood Analytics	Emery Diaz	emery.diaz@redwoodanalytics.com	Outbound - Cold Email	Piya Sharma	SQL	\$133,100	2025-11-23		147	Enterprise
LD-1037	TeamForge	Drew Foster	drew.foster@teamforge.com	Partner Channel	Emery Rivera	Closed Won	\$10,400	2026-01-16	2026-02-12	27	Starter
LD-1079	Emerald Tech	Morgan Singh	morgan.singh@emeraldtech.com	Partner Channel	Piya Sharma	SQL	\$10,900	2026-01-11		10	Professional
LD-1081	CrystalClear AI	Sam Garcia	sam.garcia@crystalclearai.com	Inbound - Content	Marcus Chen	Demo	\$37,700	2026-03-02		48	Professional
LD-1082	Emerald Tech	Finley Chen	finley.chen@emeraldtech.com	Inbound - Website	Piya Sharma	Demo	\$9,200	2026-01-18		91	Starter
LD-1083	VelocityAI	Harper Johnson	harper.johnson@velocityai.com	Outbound - LinkedIn	Piya Sharma	SQL	\$37,400	2026-01-24		82	Professional
LD-1084	Redwood Analytics	Quinn Tanaka	quinn.tanaka@redwoodanalytics.com	Outbound - LinkedIn	James Rodriguez	Proposal/Negotiation	\$4,700	2025-12-01		139	Starter
LD-1085	AmLight Data	Riley Okfor	riley.okfor@amlightdata.com	Inbound - Content	Marcus Chen	Demo	\$8,300	2026-03-15		35	Starter
LD-1086	Quantum Logic	Sam Tanaka	sam.tanaka@quantumlogic.com	Inbound - Content	Piya Sharma	SQL	\$3,100	2026-03-17		33	Starter
LD-1087	DataStream Labs	Jordan Johnson	jordan.johnson@datastreamlabs.com	Outbound - Cold Email	James Rodriguez	Closed Won	\$37,600	2026-01-27	2026-02-22	87	Professional
LD-1088	Forge Automation	Harper Park	harper.park@forgeautomation.com	Outbound - LinkedIn	Piya Sharma	Lead	\$3,500	2026-03-03		47	Starter
LD-1089	NoGen Systems	Dakota Park	dakota.park@nogen.com	Inbound - Website	Emery Rivera	Proposal/Negotiation	\$16,600	2025-12-09		131	Professional
LD-1090	Alpine Cloud	Morgan Weeber	morgan.weeber@alpinecloud.com	Inbound - Website	Emery Rivera	SQL	\$110,600	2026-04-04		10	Enterprise
LD-1091	CrystalClear AI	Dakota Weber	dakota.weber@crystalclearai.com	Outbound - LinkedIn	Piya Sharma	Discovery Call	\$149,000	2026-01-18		91	Enterprise
LD-1092	CloudPeak Solutions	Reese Kim	reese.kim@cloudpeaksolutions.com	Partner Channel	James Rodriguez	Lead	\$22,900	2025-11-21		148	Professional
LD-1093	Nimbus Ops	Logan Garcia	logan.garcia@nimbusops.com	Inbound - Content	Sarah Mitchell	SQL	\$11,000	2026-03-04		62	Professional
LD-1094	StatoSphere Co	Drew Tanaka	drew.tanaka@statosphere.com	Event/Website	Marcus Chen	Proposal/Negotiation	\$5,100	2026-01-07	2026-02-27	102	Starter
LD-1108	SynWave Digital	Morgan Larsen	morgan.larsen@synwavedigital.com	Partner Channel	Marcus Chen	Closed Won	\$10,100	2026-01-26	2026-02-27	50	Starter
LD-1095	CloudPeak Solutions	Riley Tanaka	riley.tanaka@cloudpeaksolutions.com	Referral	Emery Rivera	Closed Won	\$99,500	2026-02-28	2026-04-24	51	Starter
LD-1147	AeroVault	Jordan Garcia	j								