

SALES PIPELINE VISUALIZATION DASHBOARD FOR A B2B TECH COMPANY IN EXCEL

1. Background and Problem Statement

A B2B SaaS company offering enterprise-level software solutions had an underperforming sales review process due to disconnected Excel trackers across regional teams. The sales managers maintained opportunity-level data including lead stage, deal value, client type, and expected closure date in siloed sheets. Leadership lacked a consolidated view of the sales funnel, conversion health, and forecasted revenue. The company needed a centralized, interactive Excel dashboard to track lead progress, visualize the pipeline by stage, and forecast deal closures.

2. Objectives

- To integrate all regional opportunity data into a single dynamic Excel dashboard
- To track leads across sales stages: Prospecting, Qualified, Proposal, Negotiation, Won, Lost
- To visualize stage-wise funnel leakage, win rate, and sales rep performance
- To forecast quarterly revenue based on current pipeline maturity and historical win rates

3. Methodology

3.1 Data Collection and Standardization

- Merged Excel sheets from 4 regional teams
- Standardized columns: Deal ID, Lead Owner, Industry, Stage, Deal Size, Expected Close Date, Status
- Created a master dataset with data validation and dropdowns for future input consistency

3.2 Dashboard Design in Excel

- **PivotTables** used for aggregating deals by stage, owner, and industry
- **Slicers** implemented for interactive filtering by region, quarter, sales rep, and industry
- **Custom formulas** used to calculate:
 - Win rate = $\text{Won Deals} / (\text{Won} + \text{Lost Deals})$
 - Funnel conversion rate by stage

- $\text{Weighted pipeline value} = \text{Deal Size} \times \text{Probability of Closure}$
- **Visuals and Charts:**
 - Funnel chart for stage-wise lead volume
 - Bar chart for top-performing sales reps
 - Line chart for monthly forecasted revenue
 - KPI cards for Total Pipeline Value, Average Deal Size, Close Rate
- **Scenario Planning Section:**
 - Adjustable close probabilities per stage to simulate changes in win rate
 - Dynamic dashboard updates based on hypothetical inputs

4. Results and Benefits

- **Consolidated view** of 600+ active opportunities across teams
- **23% improvement** in sales review efficiency by reducing time spent reconciling spreadsheets
- **Pipeline leakage insight** enabled coaching interventions for early-stage stagnation
- **Improved revenue forecasts** helped align marketing and resource planning with realistic targets
- Dashboard ownership handed to Sales Ops team with no additional BI tools required

5. Deliverables

- Excel dashboard (.xlsx) with refreshable master data and dynamic visuals
- PDF usage guide covering filter functions, update process, and simulation tools
- Quarterly report template with key metrics auto-populated from dashboard

6. Stakeholder Relevance

Academic:

- Ideal for teaching funnel-based sales analytics using Excel
- Demonstrates how Excel can be used for forecasting and scenario analysis

Corporate:

- Applicable to early-growth B2B companies managing deals in spreadsheets
- Helps sales heads, business analysts, and revenue teams monitor performance in real-time

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