

BUILDING A LEAD-TO-CONVERSION SALES FUNNEL DASHBOARD FOR A SAAS COMPANY

1. Background and Problem Statement:

A growing SaaS company offering a task automation platform faced difficulties in tracking its full sales funnel. Website traffic was increasing, but conversions and churn were inconsistent. The marketing, sales, and product teams operated in silos, each relying on isolated reports. The company needed a unified **Looker Studio dashboard** to visualize the full customer journey from lead generation to paid subscription and retention.

2. Objectives:

- To develop a dashboard that visualizes the lead-to-conversion funnel in one integrated view
- To connect and consolidate data from Google Analytics, CRM (HubSpot), and Stripe
- To monitor key metrics such as CAC, conversion rate, churn rate, and MRR trends
- To identify bottlenecks and drop-off points across the sales funnel

3. Methodology:

Data Sources Integrated:

- **Google Analytics (GA4):** Website sessions, bounce rates, source/medium
- **HubSpot CRM:** Leads, pipeline stages, deal outcomes
- **Stripe:** Customer payments, plan types, refunds, MRR

Tools and Technologies:

- **Looker Studio (Google Data Studio)**
- Data connectors: Supermetrics + custom BigQuery sync
- Metric definitions:
 - CAC: $\text{Total spend} / \text{Number of new paying customers}$
 - Churn Rate: $(\text{Lost customers} / \text{Total customers at start}) \times 100$
 - MRR Growth: $\Delta \text{MRR over time}$

- Funnel Drop-offs: % between stages (e.g., site visitor → lead → demo → paid)

Dashboard Design Features:

- Funnel visualization with color-coded drop-off points
- Filters: Time range, lead source, product plan
- KPIs section: CAC, MRR, LTV, Churn Rate, Active Leads
- Trend lines for paid conversions and cancellations
- Tables showing lead velocity and sales team performance

4. Results:

- Conversion Rate: 7.2% from visitor to lead, 2.1% from lead to paid
- CAC identified as high for PPC leads, low for organic traffic
- Churn Rate: 6.5% monthly → flagged for product onboarding improvements
- MRR growth consistent but slowed during months with lower sales outreach
- 80% of drop-offs occurred between "Lead Captured" and "Demo Booked" stages

5. Interpretation and Insights:

- The funnel dashboard highlighted a weak middle stage: marketing-generated leads were not being followed up on time by sales
- Organic traffic yielded better conversion quality than paid channels, suggesting budget reallocation
- Cancellations were high among monthly plan users who skipped onboarding—pointing to a need for guided onboarding flows
- Funnel drop-off trends matched CRM activity logs, validating that CRM sync timing impacted lead reporting

6. Recommendations:

- Automate CRM-to-dashboard sync daily for real-time decision-making
- Improve demo scheduling system to reduce lead drop-offs
- Reallocate marketing spend from low-conversion paid ads to SEO and referrals

- Launch onboarding emails and in-app walkthroughs for monthly plan subscribers
- Use dashboard insights in weekly sales and marketing sync meetings

7. Future Work:

- Add user engagement data (from product analytics) to link sales to retention
- Integrate customer satisfaction (NPS) as a post-sale metric
- Deploy machine learning predictions for lead scoring inside the dashboard

8. Stakeholder Relevance:

Academic:

- Demonstrates real-world integration of marketing analytics, CRM metrics, and financial KPIs
- Useful for teaching SaaS analytics, funnel metrics, and dashboard automation

Corporate:

- Enables SaaS teams to monitor performance from lead to retention in one place
- A powerful tool for aligning marketing, sales, and product efforts with data