

## CRM & MARKETING ANALYTICS

**Challenge:** Before the new system was implemented, data was scattered across AmoCRM, Google Sheets, and monday, which was used by the service department. There was no unified funnel or reliable attribution, making it difficult to identify where a specific lead came from, how it progressed through the stages, and which source ultimately generated the sale.

**My role:** CRM architecture, funnel structure, UTM logic, integrations, automation, data import, team training, end-to-end analytics, and reporting.

### I built a lead management pipeline

Set up UTM parameters that were passed directly into the CRM

| link                                                                                                                          | UTM_campaign                   | UTM_term              | UTM_source       | UTM_medium  |
|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-----------------------|------------------|-------------|
| <a href="https://typhoon.coffee/equipment/typhoon-2-5-pro/...">https://typhoon.coffee/equipment/typhoon-2-5-pro/...</a>       | All_search_competitors_v2      | bideli coffee roaster | google           | cpc         |
| <a href="https://typhoon.coffee/?utm_source=facebook&amp;utm_...">https://typhoon.coffee/?utm_source=facebook&amp;utm_...</a> | Campaign A - Website Retarg... | 1202491201923200...   | facebook         | paid_social |
| <a href="https://typhoon.coffee/">https://typhoon.coffee/</a>                                                                 |                                |                       |                  |             |
| <a href="https://typhoon.coffee/?utm_source=facebook&amp;utm_...">https://typhoon.coffee/?utm_source=facebook&amp;utm_...</a> | Campaign A - Website Retarg... | 1202491201923200...   | facebook         | paid_social |
| <a href="https://typhoon.coffee/?utm_source=instagram_sour...">https://typhoon.coffee/?utm_source=instagram_sour...</a>       | instagram                      |                       | instagram_source | social      |
| <a href="https://typhoon.coffee/?utm_source=facebook&amp;utm_...">https://typhoon.coffee/?utm_source=facebook&amp;utm_...</a> | Lookalike-1%                   |                       | facebook         | social_cpc  |

Automated lead movement through the funnel, including assignment to the Lost stage:

|                                                                                                               |             |                        |          |          |                   |     |
|---------------------------------------------------------------------------------------------------------------|-------------|------------------------|----------|----------|-------------------|-----|
| When New stage leads changes to Agreed to buy this quarter, move item to Agreed to buy this quarter           | Критический | Обновлено 1 мес. назад | Владелец | Описание | Добавьте описание | ... |
| When New stage leads changes to Conducted KSF / presented offer, move item to Conducted KSF / presented offer | Критический | Обновлено 1 мес. назад | Владелец | Описание | Добавьте описание | ... |
| When New stage leads changes to KSF Confirmed, move item to KSF Confirmed                                     | Критический | Обновлено 1 мес. назад | Владелец | Описание | Добавьте описание | ... |
| When New stage leads changes to Manager assigned, move item to Manager assigned                               | Критический | Обновлено 1 мес. назад | Владелец | Описание | Добавьте описание | ... |

Enabled sales managers to qualify leads:

| Events | QUAL | Urgency | New stage ...  | Current status      | Production tar... | Pi |
|--------|------|---------|----------------|---------------------|-------------------|----|
|        |      |         | Taken into ... | New business        |                   |    |
|        |      |         | Taken into ... | New business        |                   |    |
|        |      |         | Taken into ... | Launching a ro...   | kg50              |    |
|        |      |         | Taken into ... | Other               |                   |    |
|        |      |         | Taken into ... | I want to start ... | kg100             |    |
|        |      |         | Taken into ... | I want to start ... | kg50              |    |
|        |      |         | Taken into ... | Other               |                   |    |
|        |      |         | Taken into ... |                     |                   |    |
|        |      |         | Taken into ... | New business        |                   |    |
|        |      |         | Taken into ... | I want to start ... | idk               |    |
|        |      |         | Taken into ... | New business        |                   |    |

A

B

C

C - not available

Q-Roastery

Q-Coffee shop

Q-Startup

1

Редактировать метки

Автоматическое назначение меток

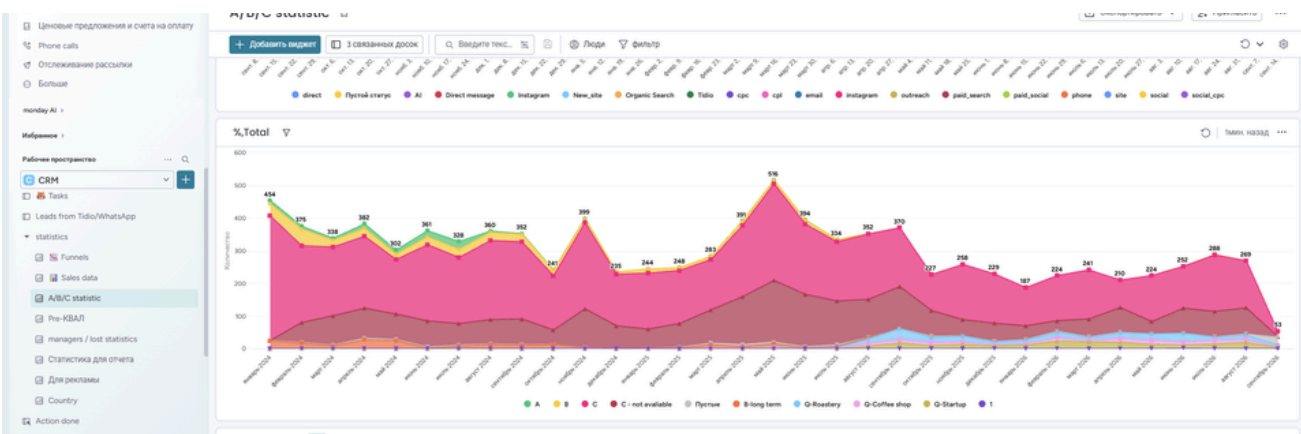
Connected telephony and integrated calls with lead records, and added a button for converting qualified leads into deals:

| link to Calls  | payments | link to S... | link to Repea... | Send to Payments |
|----------------|----------|--------------|------------------|------------------|
| Outgoing Ca... | -        | -            | -                | Send             |
| + Outg... +3   | -        | -            | -                | Send             |
| Outgoing Ca... | -        | -            | -                | Send             |
| Outgoing Ca... | -        | -            | -                | Send             |
| Outgoing Ca... | -        | -            | -                | Send             |

Separately, I used n8n to integrate Zoom transcription:

| Zoom                     | Элемент                       | Person | Date | Status   | Link                                 | Password |
|--------------------------|-------------------------------|--------|------|----------|--------------------------------------|----------|
| <input type="checkbox"/> | Test call — Claude n8n check  |        |      | New lead | Test call — Claude n8n check         |          |
| <input type="checkbox"/> | Zoom Meeting Lina langidina   |        |      | New lead | Zoom Meeting Lina langidina          |          |
| <input type="checkbox"/> | Typhoon Roasters              |        |      | New lead | Typhoon Roasters                     |          |
| <input type="checkbox"/> | Typhoon Roasters X [redacted] |        |      | New lead | Typhoon Roasters X Sara Sadat        |          |
| <input type="checkbox"/> | Typhoon Roasters X [redacted] |        |      | New lead | Typhoon Roasters X Sara Sadat        |          |
| <input type="checkbox"/> | Typhoon Roasters X [redacted] |        |      | New lead | Typhoon Roasters X Christian Buehler |          |
| <input type="checkbox"/> | + Добавить элемент            |        |      |          |                                      |          |

As a result, the CRM provided a complete lead history — from the initial enquiry and acquisition source to calls, messages, qualification, and the final deal status. It also included dashboards:



## Additionally, I built end-to-end analytics

To connect advertising metrics with actual sales results, I built an end-to-end analytics system. Data from advertising platforms and the CRM was consolidated in BigQuery and then visualised in a customised Looker Studio dashboard. This made it possible to compare spend, CPC/CPL, leads, and qualified leads with their subsequent movement through the funnel and the final cost per deal.

Advertising platform and CRM data was sent to BigQuery and displayed in a customised Data Studio dashboard.\*

*\*As this is an internal report containing complete cost and revenue data across all advertising accounts, I cannot share a screenshot. However, I can create a prototype upon request.*