**CRM and Sales Pipeline Analysis Challenge**

Are you ready to demonstrate your expertise in CRM and sales pipeline analysis? This challenge is your opportunity to showcase your skills in building comprehensive analytic reports. With personalized feedback and insightful workshops, you can elevate your report-building skills, expand your professional portfolio, and network with like-minded professionals.

A company aims to evaluate its CRM data and sales pipeline for leads registered over the last five months. The task is to build a comprehensive analytic report that provides insights into lead distribution across countries, industries, and organization sizes. The report assesses the health of the sales pipeline, forecasts potential income over the next few months, and compares sales agent performance.

**About**   
  
The FP20 Analytics Challenge 17 is brought to you in collaboration with ZoomCharts. Thanks to this partnership, we're integrating ZoomCharts' exceptional Power BI solutions into this competition. You will gain skills to create Pro reports that help business users explore data faster and more intuitively. To participate in the challenge with ZoomCharts, register here and create a Power BI report including at least 2 ZoomCharts Drill Down Visuals in one report page.

**Why participate in the Challenge with ZoomCharts?**

1. **Personalized feedback**  
   The ZoomCharts team provides personalized feedback to EVERY report entry that meets the requirements. This allows all participants to hone their skills and adjust their report before the deadline, giving you an extra competitive edge in the challenge.
2. **Receive a free license**  
   Upon signing up for the challenge, you will receive a FREE Drill Down Visuals Developers License that lets you access the full Drill Down Visuals PRO library. This license remains active for a year after the last challenge you take part in. This means you can access the latest advanced data visualization tools to enhance your projects for a year.
3. **Learning resources**  
   Participants receive all the latest information on upcoming workshops and events where our team of proven professionals share their knowledge and tips on how to approach visualizing the given dataset for the challenge. You also have the chance to book 1:1 calls with a Power BI mentor who will analyze your report and give specific suggestions to improve it.
4. **The main prize**  
   Last but not least, entering the challenge with ZoomCharts puts you in the running for an additional $300 Amazon gift card!

**Introduction**   
  
This is your moment to shine. Read the requirements carefully!

**Timeline**

* **Start:** Thursday, June 20, 2024, at 15:00 UK time
* **Submission Deadline:** Friday, July 19, at 11:59 UK time
* **Winners’ announcement:** Thursday, July 25

**Access to the LinkedIn Group and Forum**:  
<https://www.linkedin.com/groups/12751070/>

**NovyPro:**<https://www.novypro.com/>

**Instructions Video:**  
<https://www.youtube.com/watch?v=jkcAYgFGWUY>

**Your report should look to answer some or all the following questions:**

1. Who are the top-performing sales agents?
2. What are the conversion rates for leads to paying customers in different countries?
3. How does the sales performance vary across different industries?
4. How healthy is the sales pipeline month-over-month, considering the number of leads at each stage of the sales funnel?
5. What is the average time taken by sales agents to respond to new leads, and how does it impact conversion rates?
6. What are the trends in the average deal values? Are there noticeable fluctuations?
7. Based on current pipeline data and historical trends, forecast potential income for the next few months. What factors are considered in your forecasting model?
8. Does the size of the organization affect the sales cycle duration and deal value?
9. How effective are sales strategies for different products offered (e.g., SAAS vs. other product types)? Compare the deal closure rates and values between products.
10. Assess the time taken from lead acquisition to deal closure. Which factors (country, industry, agent) influence the duration of the sales cycle?
11. Investigate common characteristics of lost opportunities. What are the primary reasons for deals not closing, and how do these reasons vary by industry or country?
12. How accurate are the sales forecasts in terms of expected versus actual close dates of deals?

#### **Technical Requirements**

* All tools are permitted for FP20 Analytics Challenge.
* For ZoomCharts Challenge: create a Power BI report including at least 2 ZoomCharts Drill Down Visuals in one report page.
* Reports are restricted to a maximum of two pages.
* Canvas size is 16:9 (Default Power BI size) or Full HD size = w:1920 - h:1080.

##### **Judging Criteria**

Business users use reports to make data-driven decisions. That is why reports are called effective if they enable users to drill down and filter data quickly and intuitively to find answers to any question they might have and analyse data in all directions and dimensions. We will evaluate:

**1) How easy is it to understand the data? (max 10 points)**

* Is too much text used for explanation?
* Are the indicative colours in charts instinctually understandable?
* Does it tell a story?

**2) How easy-to-use is the report? (max 14 points)**

* Cross-chart filtering implementation across the report. Can other visuals provide relevant data as the user explores the rep
* Response time
* Drill Down: multi-layer data exploration. Can the user drill down and gain additional insights within the report?
* Use of tutorial overlays and other elements to assist new users. Can a new user start using this report straight away with just the guidance provided within the report itself?

**3) How good is the report design and is it suitable for its purpose? (max 10 points)**

* Visual design: is the overall look consistent, no empty spaces, no overcrowding?
* Interface design: are there unnecessary visualisations/buttons/complexity in use?
* UX design: is the produced report usable?
* Report design: is the main challenge answered?
* Technical: are all the fonts used the same, are the sizes readable?

You are encouraged to use various techniques at your disposal, such as tooltips, drill-throughs, drilldowns, cross-chart filtering, and page navigation features, to enhance your analysis.

### **The Resources.**

1. Excel Spreadsheet with dataset (English & Spanish).

2. PDF with the Intro and Brief in English.

3. PDF with the Intro and Brief in Spanish.

### **Zoomcharts Resources.**

Resources that will inspire you to master Power BI reports that end-users will love:

1. [Use-Case Gallery](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/dashboard-and-report-examples/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=use-case_gallery): Try live demos and download reports made by the ZoomCharts team

2. [Video tutorials](https://academy.zoomcharts.com/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=video_tutorials): Watch engaging video guides on how to set up and use the visuals

3. [Documentation](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/documentation/general/getting-started/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=documentation): Technical deep-dive about ZoomCharts visuals

4. [ZoomCharts Blog](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/blog/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=blog): Useful tips & tricks for data visualization and report creation

5. [Visuals Gallery](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/gallery/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=visuals_gallery): Explore all the possible customization options for Drill Down Visuals.

### **Submissions of Entries.**

**\*IMPORTANT\***

To submit your two-page report, please follow these steps, if you want to be considered for the Zoomcharts' prize, otherwise post your entry in the challenges group.

### **1.**[**Submit your entry .pbix file here.**](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/challenges/fp20analytics-march-2024?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march&utm_term=register&utm_content=registration) Your report will undergo validation to ensure it meets all the technical requirements. If the report is valid, you will receive a 'Publish to Web' link. If it does not meet the requirements, you will receive a rejection reason and will have the opportunity to resubmit your report.

### **2. Post your submission on LinkedIn:**

1. Upload the report as a PDF document on your LinkedIn feed.

2. Use the caption "I am participating in FP20 Analytics Challenge 14”, along with screenshots from your report.

3. Include a summary of your report's key insights and publish it to the web or NovyPro link.

4. Use the hashtags #FP20Analytics, #FP20AnalyticsEducationAnalysis, #builtwithzoomcharts, tag @Federico Pastor and @Zoomcharts.

5. Additionally, post your report in [the FP20 Analytics LinkedIn Community Group.](https://www.linkedin.com/groups/12751070/)