

Presented by MANHAM

CRM Insights for Managers

Sales Snapshot

Maven CRM Project



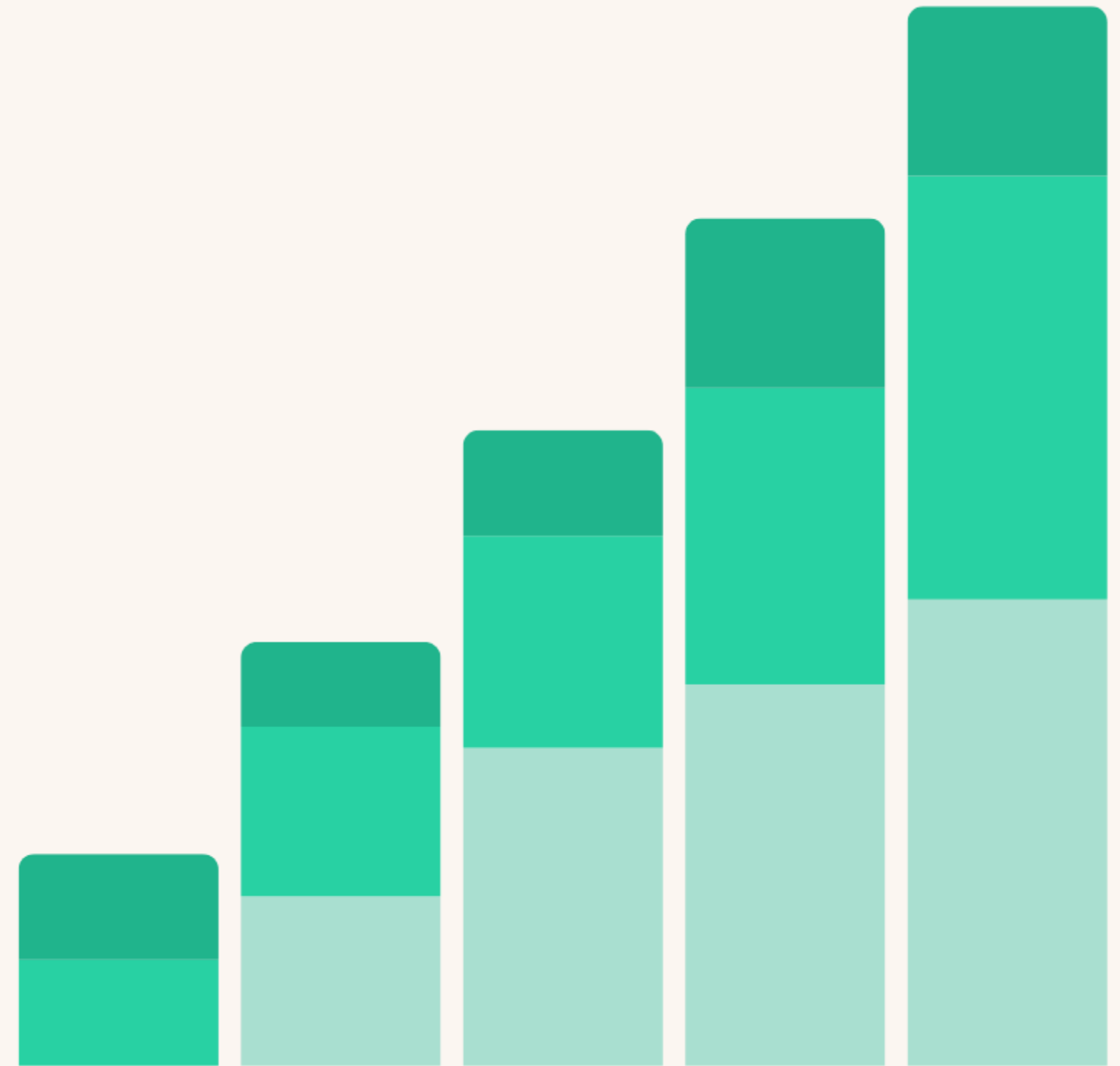
Introduction to results analysis

The dataset comprised records exported from MavenTech's CRM, spanning from October 2016 to December 2017. It included details of opportunities along with related information such as the product, account, and the outcome of each sale, whether won or lost.



Methodology used in the analysis

The analysis utilizes a descriptive and comparative approach to examine sales performance for 4Q. 2017. Data is analyzed using Power BI Desktop. The analysis focuses on key performance indicators (KPIs) such as total sales, conversion rate, average selling price, and average weeks to sale. The reports provide insights into sales performance across different managers, regions, products, and sectors, enabling the identification of top-performing areas and opportunities for improvement. By examining these metrics and trends, the analysis aims to inform data-driven decisions that drive business growth and optimization.



Main challenges identified

01.

How is my team (as a whole and individual team members) tracking against our key KPIs?

02.

Are there team members who require extra support in certain areas?

03.

Where should I focus my efforts for the rest of the quarter to improve performance?

04.

Is my team performing above average compared to the rest of the business?

Current Quarter Performance:

Select a sales manager to view their report for 2017:

Cara Losch

Q4 2017

Total Sales per Manager

311K

Avg. Total Teams sales

467K

Avg. Selling Price

\$2,271

Avg. All Teams Sales

\$2,343

Avg. Weeks By Manager

6.69

Avg. Weeks to Sale

6.62

New Opportunities

147

All Teams Opportunities

637

Sales by Agent					
Agents	% Conversion	Units	Avg. Selling Price	Total Sales	Avg. Weeks To Sale
Corliss Cosme	61.43%	43	\$2,470	\$106,195	6.99
Wilburn Farren	66.67%	22	\$3,140	\$69,082	6.76
Rosie Papadopoulos	55.26%	21	\$2,786	\$58,496	6.84
Garret Kinder	45.71%	16	\$3,301	\$52,812	5.40
Violet Mclelland	61.40%	35	\$702	\$24,563	6.96

Products Sales			
Product	% Conversion	Units	Total Sales
MG Special	64.29%	36	1966
GTXPro	62.50%	25	120110
MG Advanced	58.33%	21	69033
GTX Plus Basic	52.63%	20	21625
GTX Basic	59.38%	19	10466
GTX Plus Pro	53.33%	16	87948

Overview Dashboard KPIs

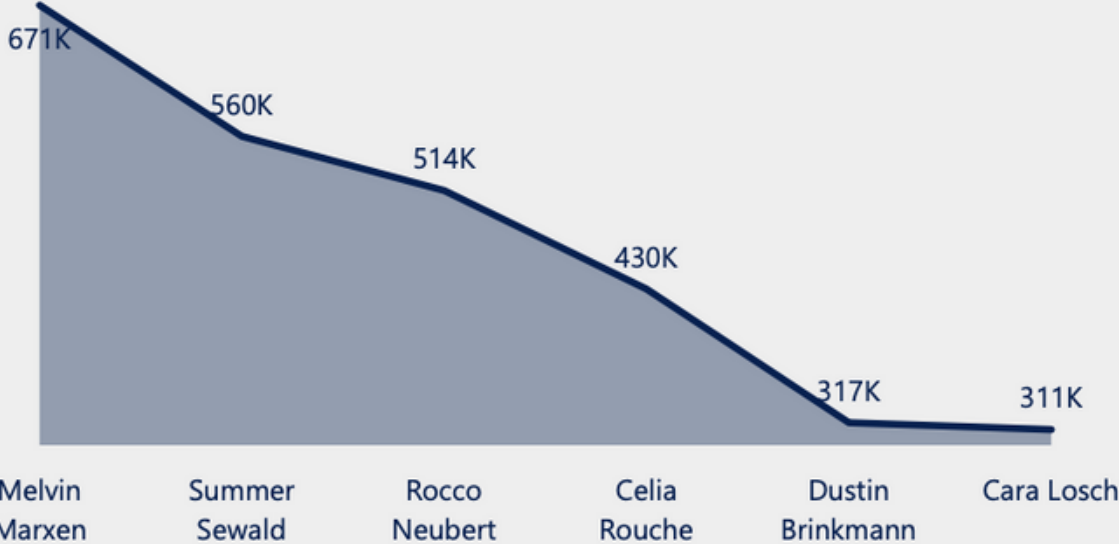
Based on the analysis, the main KPIs (Key Performance Indicators) are:

- **Total Sales:** The total revenue generated by each manager, region, or product.
- **Conversion Rate:** The percentage of opportunities that result in won sales.
- **Average Selling Price (ASP):** The average price of each sale.
- **Average Weeks to Sale:** The average time it takes to close a sale.
- **Number of Won Sales:** The total number of sales won by each manager or region.

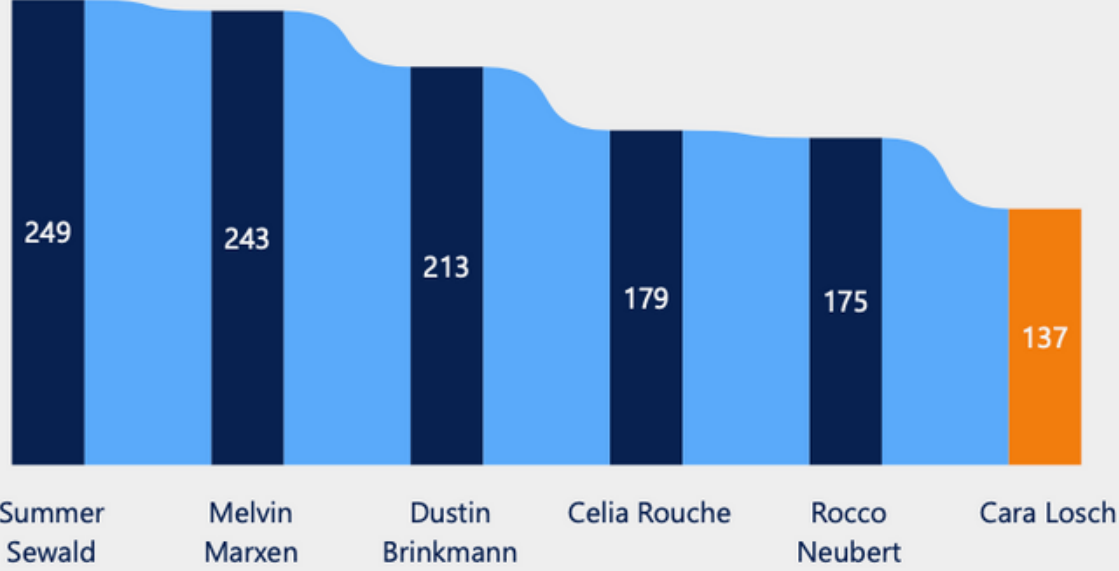
These KPIs provide insights into sales performance, revenue generation, and sales efficiency, enabling data-driven decisions to drive business growth and optimization.

Team Performance Overview for Q4 2017:
Cara Losch Team

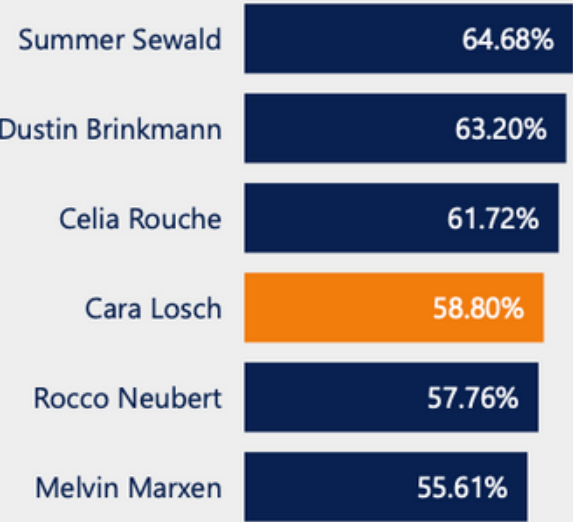
Total Sales by manager



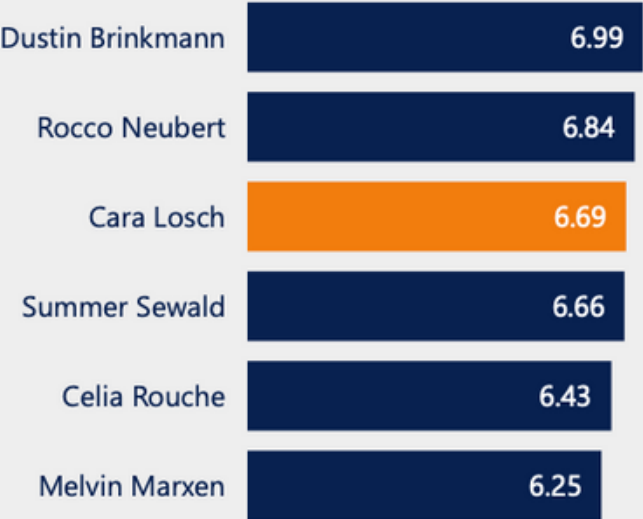
Number of Won Sales



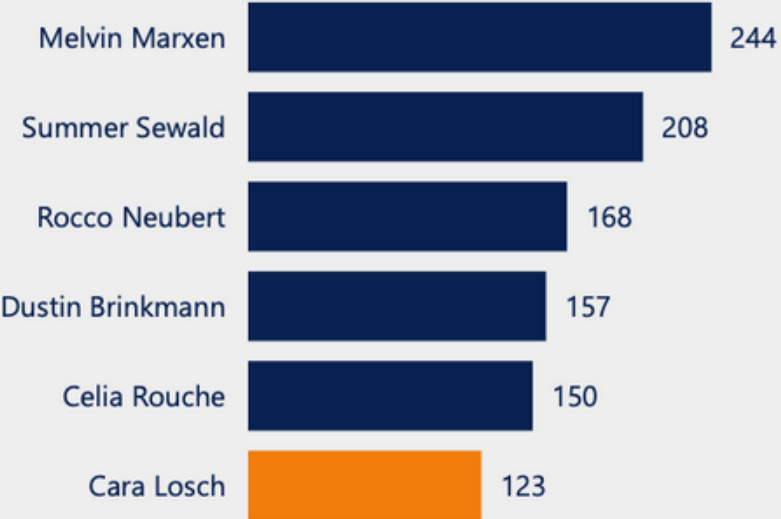
Conversion %



Avg. Weeks to close



New Opportunites



Team Performance

Team Performance

1. "Number of Won Sales by Team Member"

- Overview: Highlights the total sales won by each team member, showcasing top performers like Summer Sewald.

2. "Total Sales by Manager"

- Overview: Compares total sales revenue generated by each manager's team, with leaders like Melvin Marxen standing out.

3. "Conversion Percentage by Manager"

- Overview: Shows the conversion rate for each manager's team, indicating effectiveness in closing sales.

4. "Average Weeks to Close by Manager"

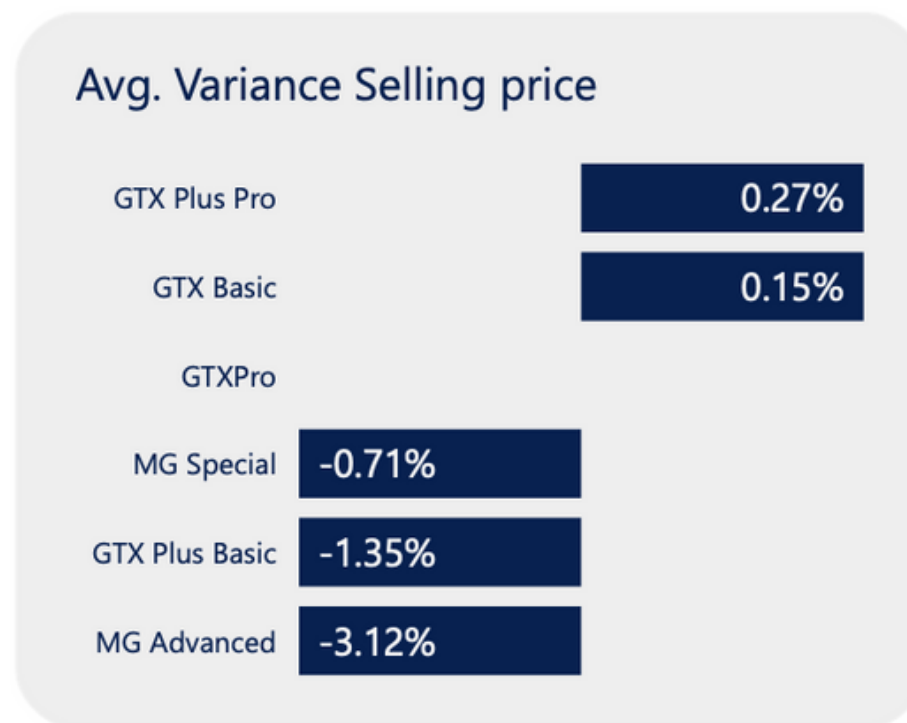
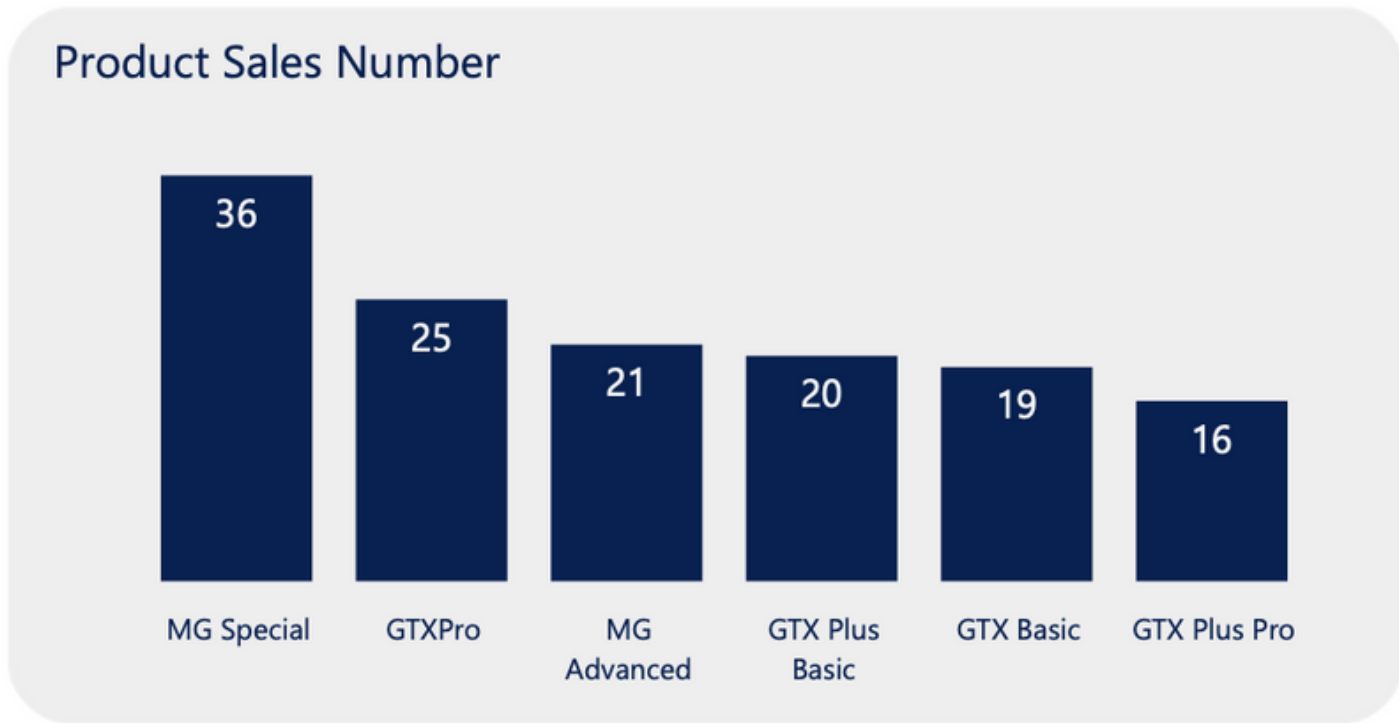
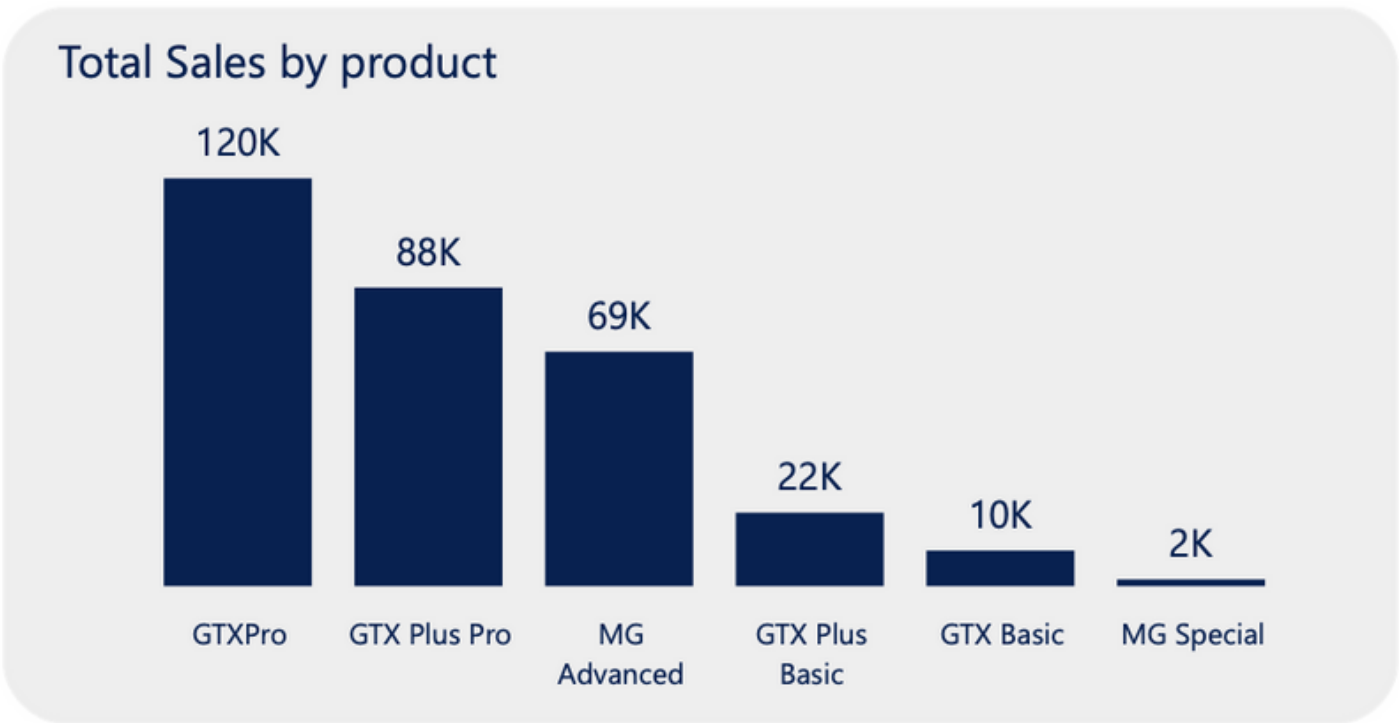
- Overview: Illustrates the average time each manager's team takes to close sales, highlighting efficiency.

5. "New Opportunities by Manager"

- Overview: Compares the number of new sales opportunities generated by each manager, with Melvin Marxen leading.

Product Performance Overview for Q4 2017:

Cara Losch Team



Product Performance

Product Performance

1. "Product Sales Number"

- Overview: Displays the number of sales for each product, highlighting top sellers like MG Special and GTXPro.

2. "Total Sales by Product"

- Overview: Compares total revenue generated by each product, with GTXPro leading in sales.

3. "Won vs Lost Product"

- Overview: Shows the conversion rates of won versus lost sales for each product, indicating product performance.

4. "Average Product Weeks to Sale"

- Overview: Illustrates the average time taken to sell each product, with MG Special taking the longest.

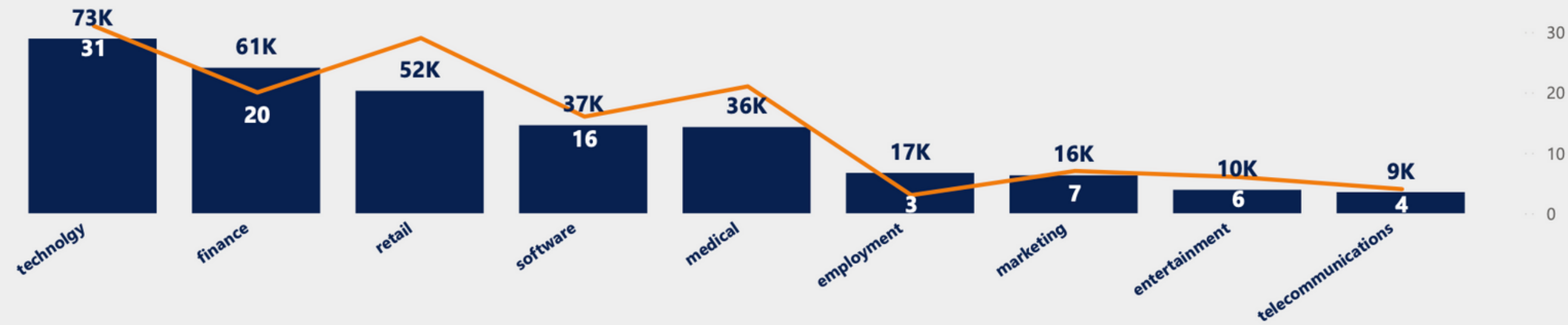
5. "Average Variance in Selling Price"

- Overview: Compares the variance in selling prices across products, indicating price stability or fluctuation.

Accounts Performance Overview for Q4 2017:

Cara Losch Team

Sales Revenue vs Numbers



Account	Sector	% Conversion	Total Sales	Units	Avg. Weeks
Zencorporation	technology	80.00%	13981	4	0.60
The New York Inquirer	medical	77.78%	19152	7	6.78
Gekko & Co	retail	75.00%	15697	9	7.50
Umbrella Corporation	finance	73.33%	29797	11	6.87
Donquadtech	technology	72.73%	12714	8	8.09
Vehement Capital Partners	finance	71.43%	18604	5	4.14
Opentech	finance	66.67%	12767	4	4.83
Ontomedia	employment	60.00%	16989	3	1.00
Konex	technology	53.85%	24612	7	5.38
Kan-code	software	46.15%	19236	6	7.38

Total Sales by Office Location



Accounts Performance

1. "Total Sales by Office"

- Overview: Displays total sales by office location, with the USA leading in revenue generation.

2. "Total Sales by Account Sector"

- Overview: Compares sales across different account sectors, highlighting the dominance of the Technology sector.

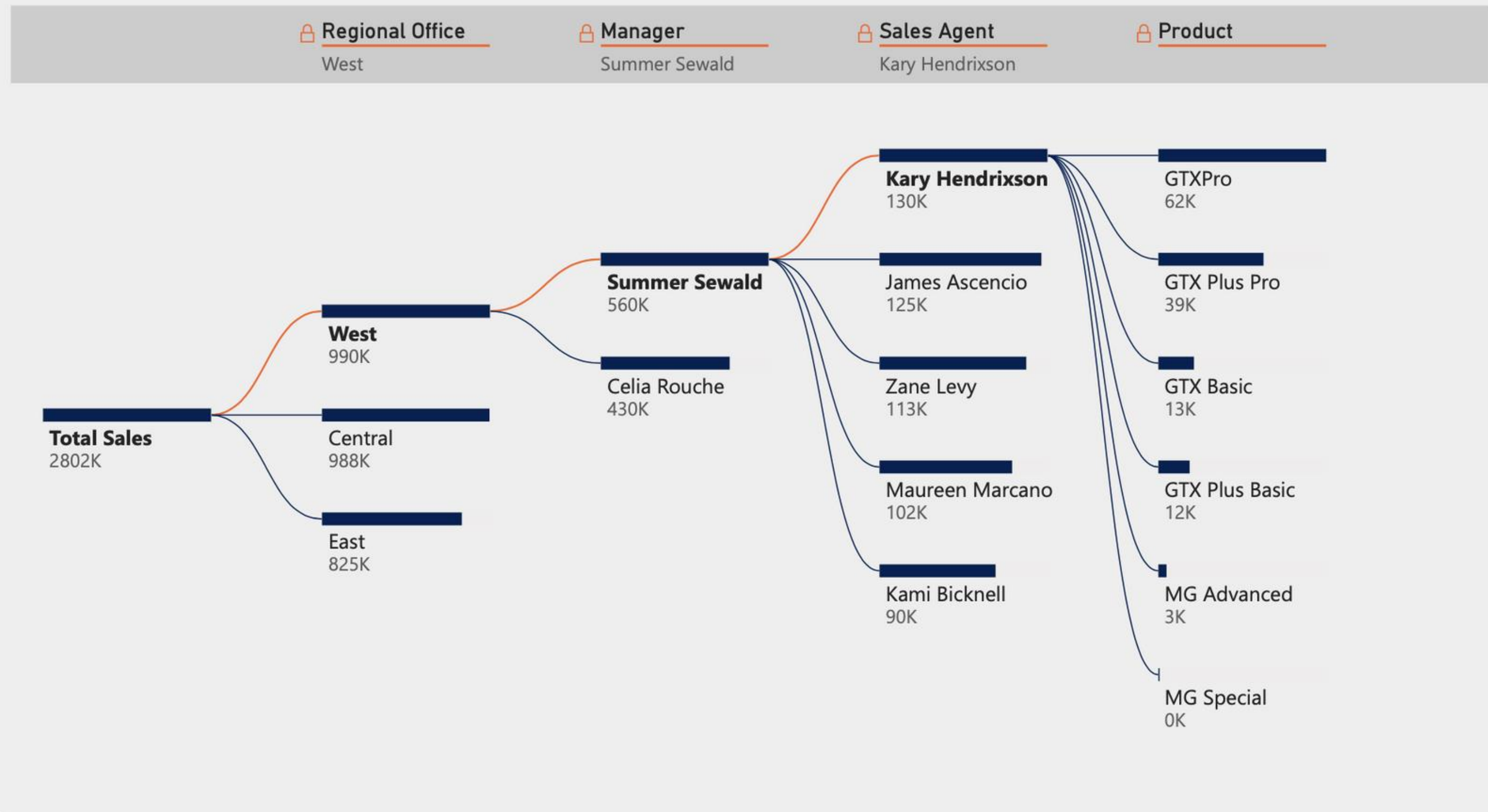
3. "Conversion Percentage by Sector"

- Overview: Shows the conversion rates for each account sector, indicating sales success in different industries.

4. "Sales Revenue vs Number of Sales"

- Overview: Illustrates the relationship between sales revenue and the number of sales across sectors, showing where high volume correlates with high revenue.

Total Sales Analysis for Q4 2017:



Total Sales Analysis

Summary

This presentation provides an analysis of 4Q 2017 sales performance, covering key metrics across managers, teams, products, and regions. It highlights top-performing managers and products, examines team efficiency and conversion rates, and compares sales across different regions and sectors. The presentation concludes with insights and recommendations for optimizing future sales strategies.

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Thank
you very
much!

