

Sales and Subscription Performance Dashboards – Portfolio Project

Problem Statement

Sales and subscription-based organizations often struggle to connect day-to-day activity with long-term revenue outcomes. In sales teams, managers can usually see topline totals such as revenue or deal counts but lack clarity on how incentive components like accelerators, ARPU bonuses, or SPIFFs drive commission earnings. Similarly, in subscription businesses, headline numbers such as total subscribers or total MRR are reported, but the underlying mechanics of growth, churn, and retention are often unclear. Without this level of visibility, leaders find it difficult to coach teams effectively, adjust incentive models, and make targeted interventions to improve both acquisition and retention performance.

Dashboard Solution

I developed a two-page Power BI solution to address these challenges, one page for Sales Performance and one page for Subscription Performance. Both dashboards are built on a common semantic model that integrates transactional sales data, commission rules, and subscription lifecycle data.

Page 1: Sales Performance Dashboard

- KPIs: EPC, total commission, ARPU, attainment, and deals.
- Waterfall chart: breaks down commission earnings into base, accelerators, ARPU bonus, SPIFFs, mix bonus, and quota kicker.
- Bullet chart: compares actual deals against scaled quota targets.
- Regional comparison: highlights upsell penetration by geography.
- What-if parameter: allows managers to test quota levels and model the impact on attainment.

Page 2: Subscription Performance Dashboard

- KPIs: new subscriptions, churned MRR, net MRR growth, active subscribers to date, and average tenure.

- Net Adds line chart: shows the balance of new and lost subscribers month by month.
- MRR Walk (waterfall): explains the revenue journey from starting MRR through new MRR, churned MRR, and ending MRR.
- Rep-level matrix: details MRR, churn, clawbacks, and early cancel percentages by sales rep.
- Retention chart: compares subscriber retention rates across cohorts and years.

Insights

Sales Performance

- Most reps underperformed against quota with only a small group reaching higher attainment bands.
- Commission was heavily weighted toward base pay which shows limited activation of accelerators and bonuses.
- Regional benchmarks revealed stronger penetration in certain areas while other regions lagged significantly.
- Scenario testing showed how modest quota adjustments could shift more reps into higher attainment brackets.

Subscription Performance

- While subscriber numbers are growing, churned MRR consistently offsets a portion of this growth, underlining the importance of churn reduction.
- Early cancellations within three months represented around 2–3 percent of new subscriptions, creating measurable clawback exposure.
- Retention remained strong in the first year but dropped more sharply in the second, suggesting lifecycle engagement should go beyond onboarding.
- Certain reps demonstrated lower churn and clawbacks, showing best practices that could be shared across the team.
- The MRR Walk clarified that net growth depends more on churn control than on raw acquisition volume.

Business Value

The combined dashboards provide managers with a clear and actionable view of both sales incentives and subscription sustainability. Together they enable leaders to:

- Identify coaching opportunities for underperforming sales reps.
- Evaluate whether incentive schemes are driving the right behaviors.
- Pinpoint regional underperformance in upsell activity.
- Track where subscriber growth is being offset by churn.
- Quantify the financial impact of early cancels and clawbacks.
- Monitor retention by cohort to plan more effective engagement strategies.

By going beyond topline figures into incentive mechanics, churn dynamics, and retention performance, the dashboards give leadership the tools to manage both revenue generation and customer sustainability with greater precision.

Limitations and Future Enhancements

While the dashboards provide strong visibility, there are some limitations:

1. Subscription data is tracked at monthly granularity, so mid-month start, or end dates are not pro-rated.
2. Early cancel and clawback rules are hardcoded at three months which may not be flexible enough for all business contexts.
3. Retention is based on straightforward cohort counts. More advanced survival models could provide deeper predictive insights.
4. The MRR Walk does not distinguish between upsell revenue and new customer revenue which limits the ability to isolate true acquisition impact.
5. Differences between totals and monthly breakdowns may confuse non-technical users due to DAX context behavior.

Future Enhancements

- Introduce pro-rata calculations for partial-month subscriptions.
- Allow configurable rules for clawback and early cancels.
- Segment retention further by product type or geography.
- Extend retention analysis using statistical survival models.
- Build separate tracking for upsell versus new acquisition revenue.
- Enhance user guidance within the dashboard to reduce misinterpretation.