

# MAVEN TECH

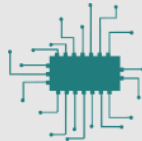
## Project Objective :

Maven Tech, a leading company specializing in selling computer hardware to large businesses, recently implemented a new CRM system to track their sales opportunities. However, there was limited visibility into sales data outside of the platform. My role was to develop an interactive **Power BI dashboard** that would provide actionable insights into the quarterly performance of sales teams, enable sales managers to track key metrics, and drive data-driven decision-making across the organization.

## Data Overview :

- . **Accounts Table:** Contains company information such as account name, sector, annual revenue, and employee size.
- . **Products Table:** Includes details on product names, series, and sales prices.
- . **Sales Teams Table:** Records the sales agents, their managers, and their respective regional offices.
- . **Sales Pipeline Table:** Tracks each sales opportunity, including the sales stage (Prospecting, Engaging, Won, or Lost), sales agent, product, account, and key dates for deal engagement and closure.





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Open Opportunities For : **Melvin Marxen**

Sales Agent	Product Name	Account Name	Engaged Date	Sales Price
Niesha Huffines	GTX Plus Basic		15-08-2017	1096
Niesha Huffines	GTX Pro		15-08-2017	4821
Darcel Schlecht	GTX Pro		14-08-2017	4821
Jonathan Berthelot	GTX Basic		14-08-2017	550
Jonathan Berthelot	GTX Plus Basic		14-08-2017	1096
Jonathan Berthelot	GTX Pro		14-08-2017	4821
Marty Freudenburg	MG Advanced		14-08-2017	3393
Darcel Schlecht	GTX Plus Basic		13-08-2017	1096
Gladys Colclough	GTX Basic		13-08-2017	550
Marty Freudenburg	GTX Plus Basic		13-08-2017	1096
Marty Freudenburg	GTX Pro		13-08-2017	4821
Darcel Schlecht	MG Special	Finjob	12-08-2017	55
Marty Freudenburg	GTX Basic	Bluth Company	12-08-2017	550
Gladys Colclough	GTX Plus Pro	The New York Inquirer	11-08-2017	5482
Marty Freudenburg	MG Advanced	Streethex	11-08-2017	3393
Darcel Schlecht	GTX Plus Pro		10-08-2017	5482
Jonathan Berthelot	GTX Basic		10-08-2017	550

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Sector :

Employment

Entertainment

Finance

Marketing

Medical

Retail

Services

Software

Technolgy

Telecommunications

Product Analysis For :Melvin Marxen

Sales Agent :Darcel Schlecht

Quarterly Won Rate By Product

Product Name	Q1	Q2	Q3	Q4
GTX Basic	66.67%	56.25%	68.75%	88.89%
GTX Plus Basic	88.89%	68.18%	74.19%	47.62%
GTX Plus Pro	75.00%	62.50%	81.82%	68.75%
GTX Pro	68.18%	58.21%	58.14%	62.22%
MG Advanced	100.00%	70.00%	56.00%	33.33%
MG Special	100.00%	60.00%	66.67%	50.00%
Total	77.19%	61.54%	63.54%	59.12%

Total Sales By Product

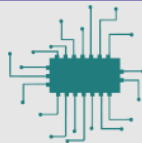
GTX Pro	\$0.77M
GTX Plus Pro	\$0.18M
MG Advanced	\$0.12M
GTX Plus Basic	\$0.06M
GTX Basic	\$0.02M
MG Special	\$0.00M

Product Performance

Product Name	Total Sales	Won Rate (%)	Lost Rate (%)	Total Deals	Avg Sales Value	Engaging Deals
GTX Basic	\$20,124.00	52.17%	24.64%	69	\$379.70	7
GTX Plus Pro	\$1,76,844.00	50.00%	21.21%	66	\$3,762.64	6
GTX Plus Basic	\$61,207.00	48.28%	23.28%	116	\$737.43	12
MG Special	\$1,550.00	47.46%	25.42%	59	\$36.05	9
MG Advanced	\$1,20,360.00	46.15%	32.05%	78	\$1,973.11	9
GTX Pro	\$7,73,129.00	44.69%	29.33%	358	\$2,917.47	40
GTK 500			100.00%	1	\$0.00	

Total Deals By Product

GTX Pro	358 (47.93%)
GTX Plus Basic	116 (15.53%)
MG Advanced	78 (10.44%)
GTX Basic	69 (9.24%)
GTX Plus Pro	66 (8.84%)
MG Spec...	59 (7.9%)

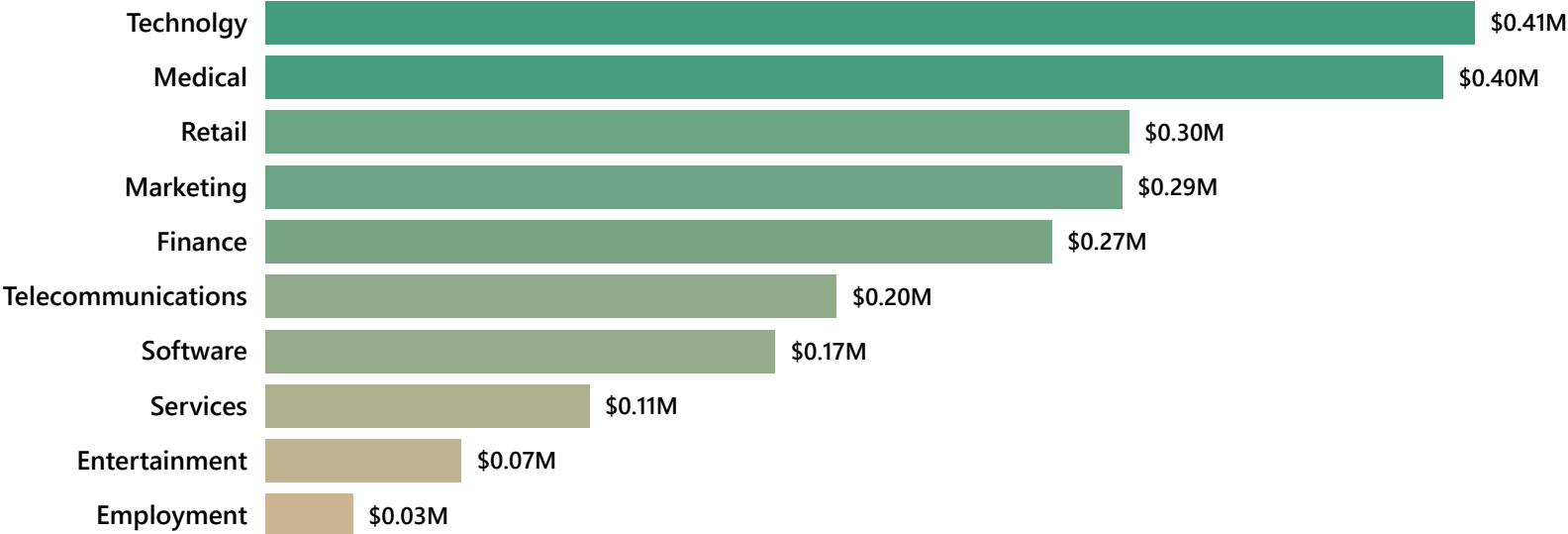


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# Total Sales Analysis For : Melvin Marxen

Total Sales By Sector



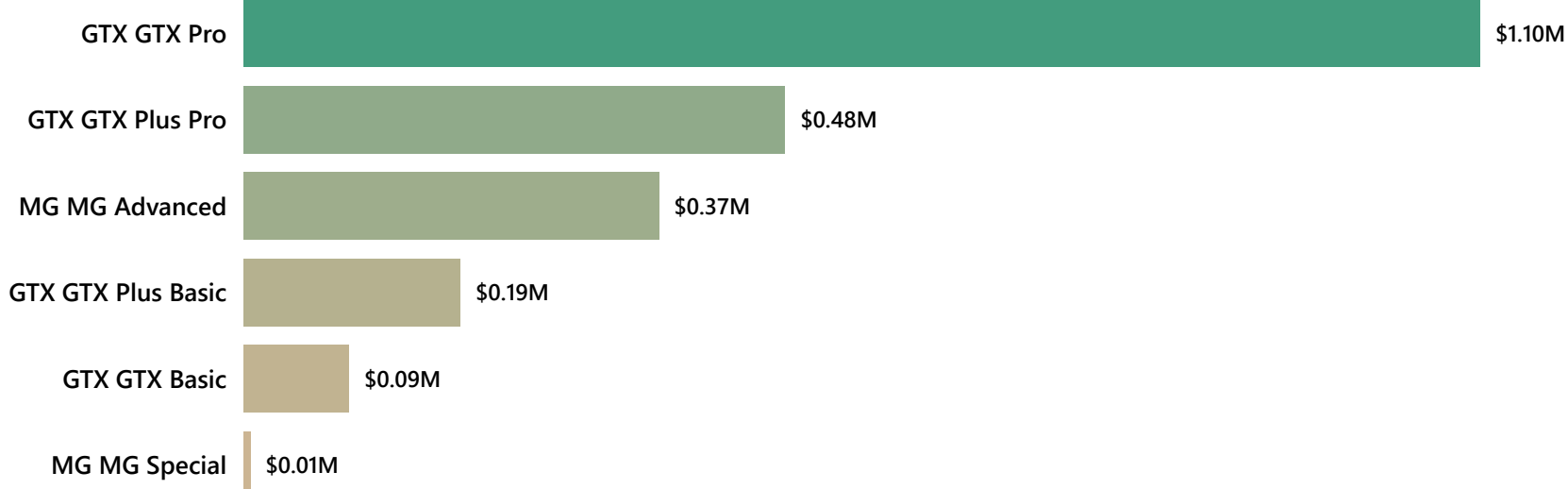
Total Sales By Office Location

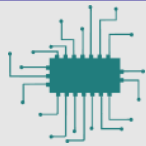


Top 5 Account



Total Sales By Product Series





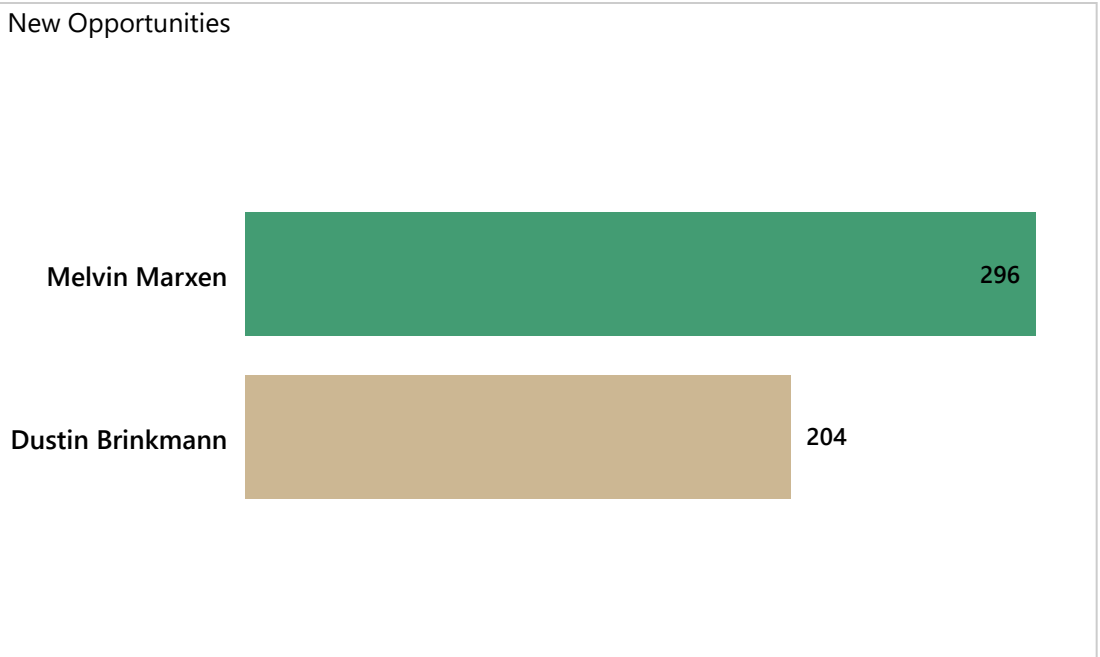
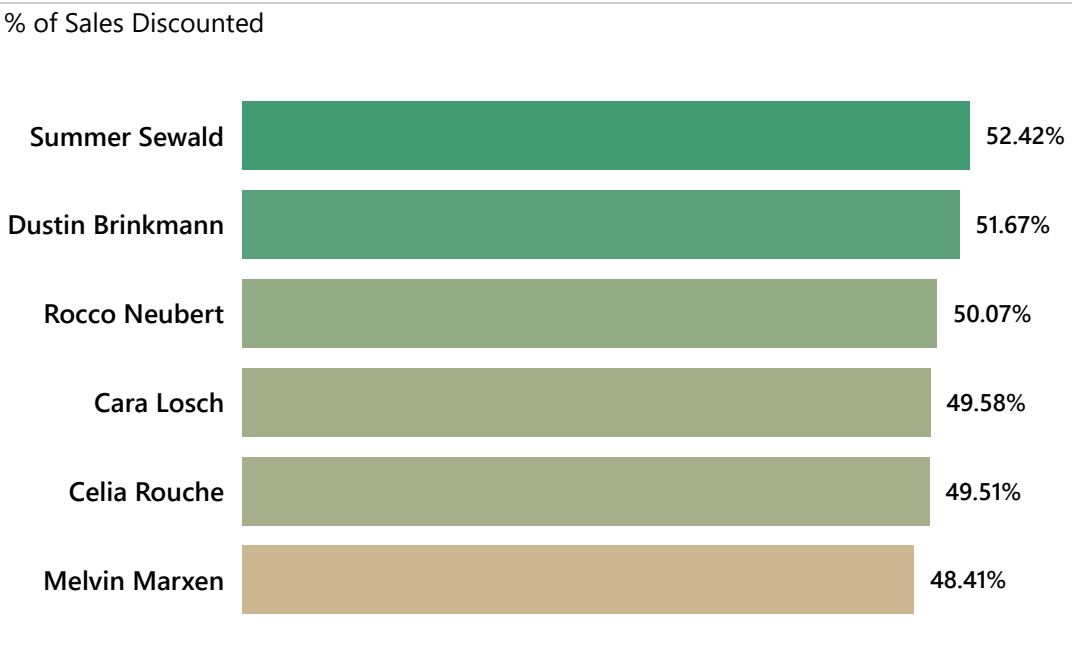
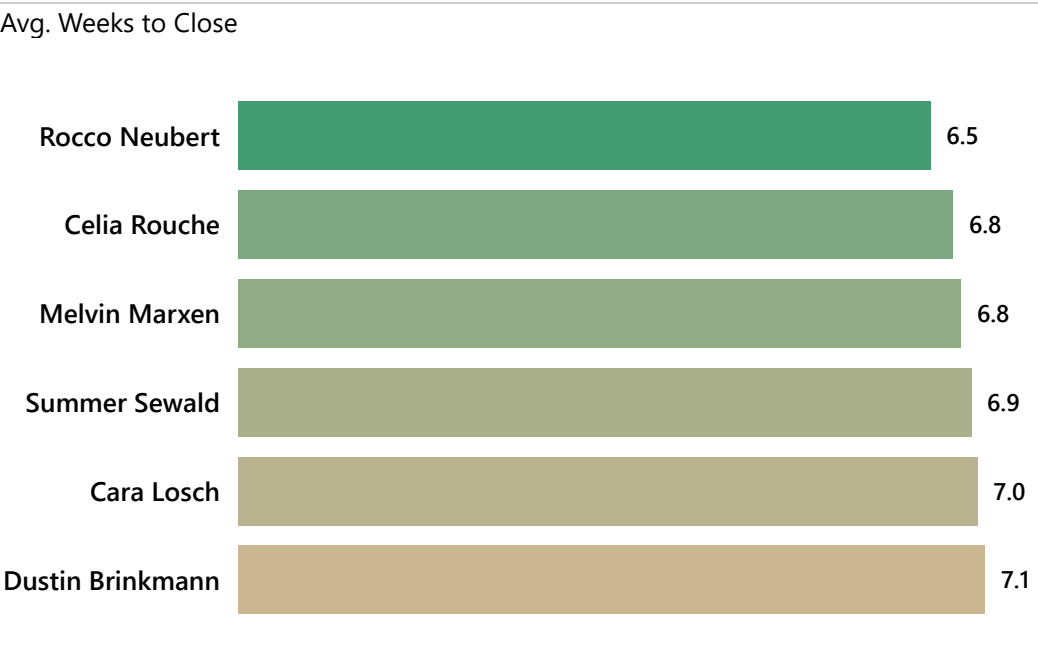
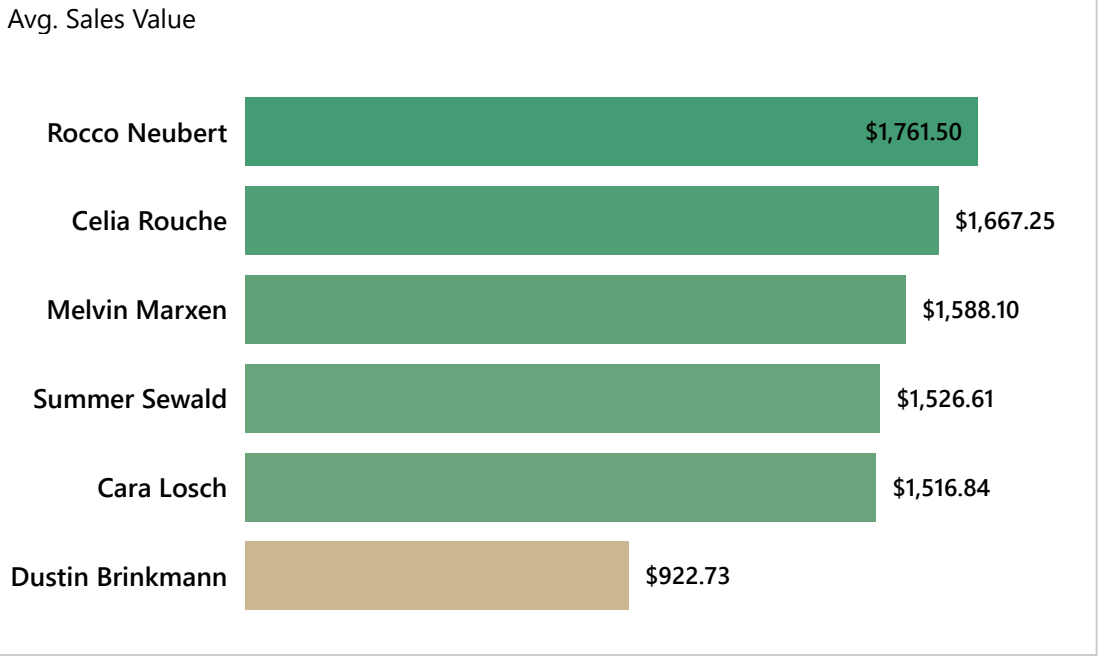
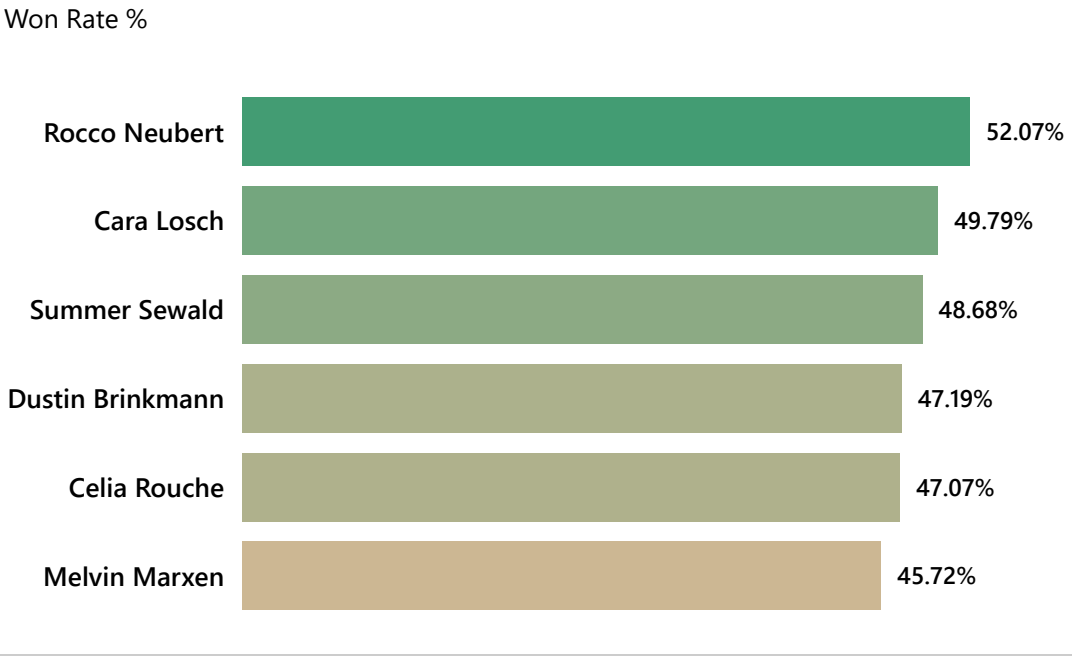
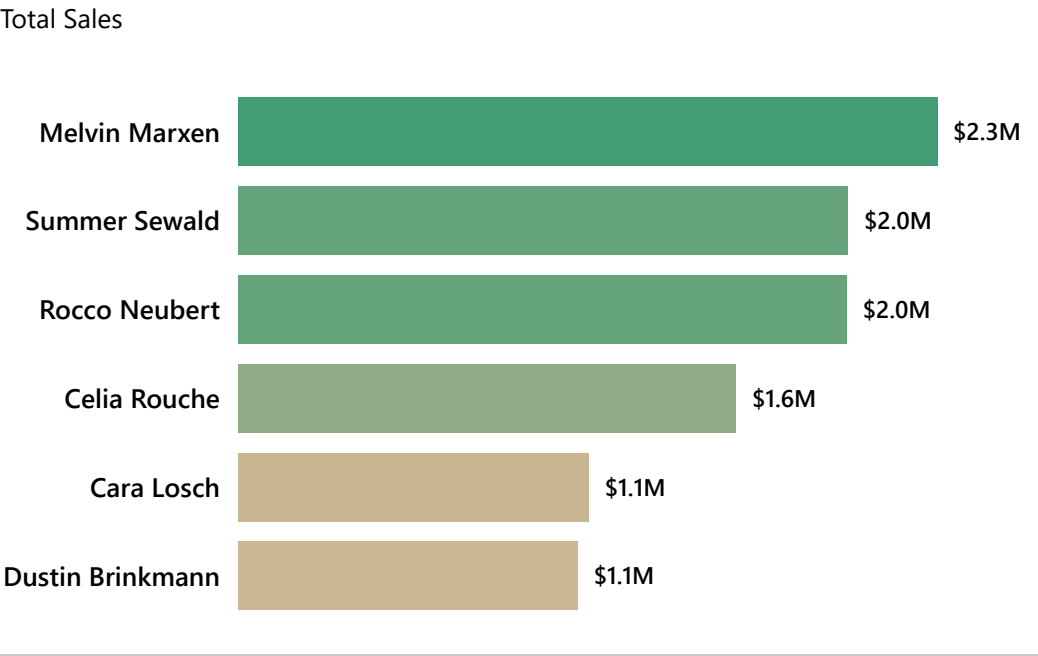
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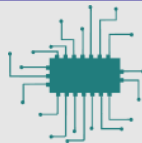
Sector :

- ☐ Employment
- ☐ Entertainment
- ☐ Finance
- ☐ Marketing
- ☐ Medical
- ☐ Retail
- ☐ Services
- ☐ Software
- ☐ Technolgy
- ☐ Telecommunications



# How is each sales team performing compared to the rest?





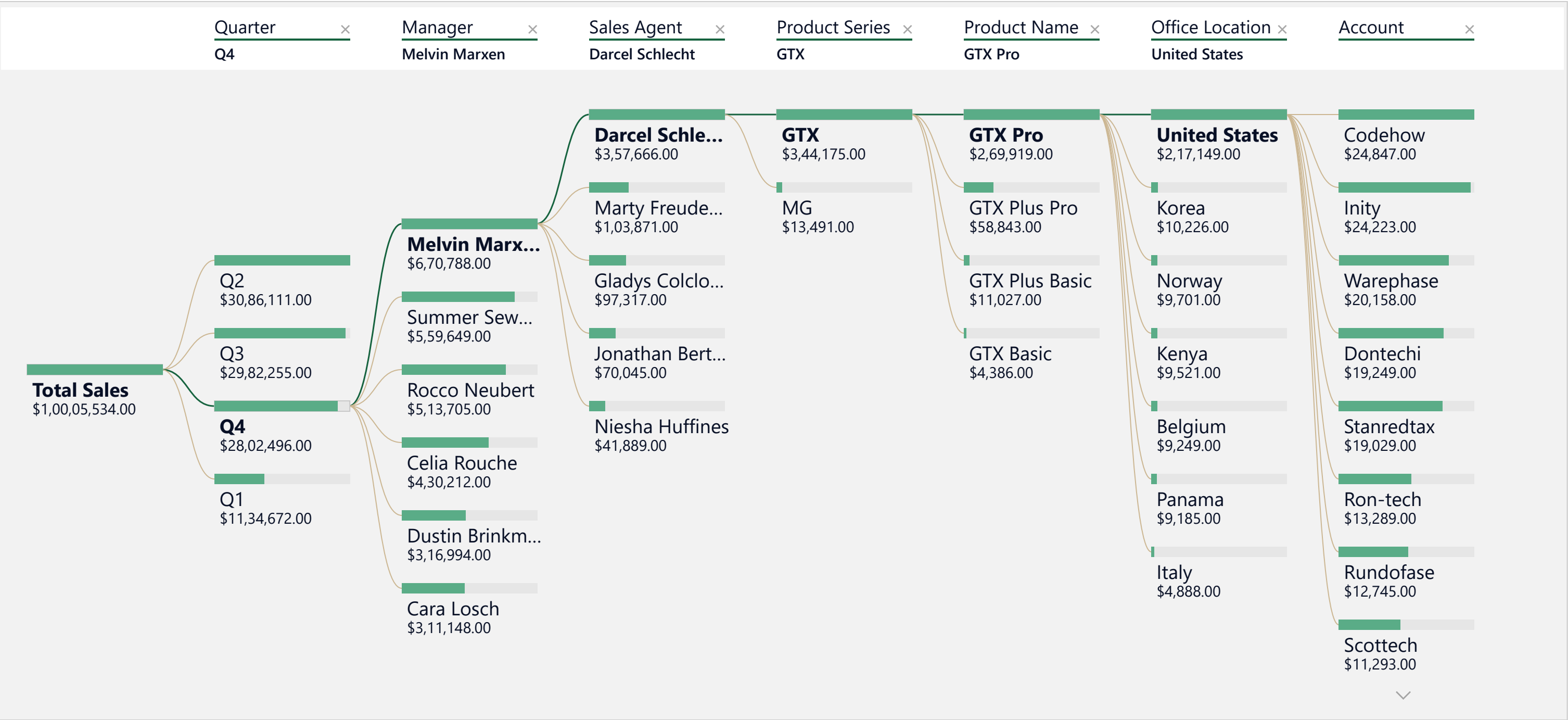
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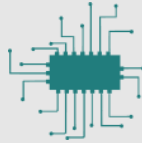
Fields :

- ☒ Total Sales
- ☐ Won Rate (%)
- ☐ Avg Sales
- ☐ Total Deals



# Summarized Overview Of Maven's Tech CRM Data : Total Sales





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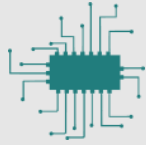
# Maven Tech CRM Dashboard

This interactive dashboard enables sales managers to monitor key metrics, such as total sales, average sale value, won rates, and sales pipeline progress, allowing them to identify underperforming teams and individual sales agents.

## Data Dictionary: Key Measures

- . **Total Sales Value** : The total value of all deals that have been successfully closed (Won).
- . **Average Sale Value** : The average value of all successfully closed (Won) deals.
- . **Average Weeks to Close** : The average number of weeks it took to close a deal from the engaging stage to closure.
- . **Total Deals** : The total number of deals in the pipeline, regardless of deal stage (Won, Lost, or in progress).
- . **Won Rate (%)** : The percentage of deals that have been successfully won.
- . **% of Sales Discounted**: The percentage of won sales that had close values lower than the standard product price.
- . **Loss Rate (%)** : The percentage of deals that were lost.
- . **Engaging Deals Count** : The number of deals currently in the “Engaging” stage of the sales pipeline.
- . **New Opportunities** : The number of new deals that are in the "Prospecting" stage.
- . **Potential Sales** : The total potential value of all deals that are still in progress (Engaging stage).
- . **QoQ % Total Sales Change** : The quarter-over-quarter percentage change in total sales.
- . **QoQ % Average Sales Change** : The quarter-over-quarter percentage change in average sales value.
- . **QoQ % Total Deals Change** : The quarter-over-quarter percentage change in the number of total deals.
- . **QoQ % Won Deals Change** : The quarter-over-quarter percentage change in the number of won deals.
- . **Previous QTR Total Sales** : The total sales value for the same period in the previous quarter.
- . **Previous QTR Average Sales** : The average sales value for the same period in the previous quarter.

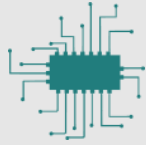




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## Insights :

- **Melvin Marxen's** team led in terms of total sales, generating **\$2.25M** in revenue. **Summer Sewald** followed with **\$2.0M**, while lowest sales generated by **Dustin Brinkmann's** team **\$1.1M** in sales.
- **Rocco Neubert** led with a **52.07% won rate**, followed by **Cara Losch** at **49.79%** and **Melvin Marxen** have least won rate at **45.72%**.
- A higher average sales value indicates that the manager's team is closing higher-value deals. **Rocco Neubert's** team led in terms of average sales, generating **\$1.76K**. **Celia Rouche** followed with **\$1.67K**, while lowest average sales generated by **Dustin Brinkmann's** team **\$0.92K**.
- **Rocco Neubert's** team demonstrated the fastest deal closure time at **6.5 weeks**, while **Dustin Brinkmann's** team had the longest time to close, averaging **7.1 weeks**. Faster deal closure can indicate operational efficiency. Rocco Neubert's team could be leveraged to mentor other teams on best practices for reducing the time to close deals.
- **Summer Sewald** and **Dustin Brinkmann** applied discounts to over **50%** of their deals, with **Summer Sewald** leading at **52.42%**. While these teams have strong win rates, the high discount usage may indicate an over-reliance on pricing cuts to close deals, which could hurt profitability.
- **Melvin Marxen's** team generated the most new opportunities with **296 new deals**, followed by **Dustin Brinkmann** with **204 new opportunities**. Melvin's team is not only a leader in total sales but also in generating new leads. This could be a strong indicator of growth potential and lead management success.
- **Melvin Marxen's** team has **\$542K in potential sales** from deals still in the "Engaging" stage, showcasing a robust sales pipeline. With proper follow-up and strategy, these deals can translate into future revenue. Targeting these high-potential deals should be a priority.
- The top-performing product across all managers was **GTX Pro**, contributing **\$110K** in sales and achieving a **43.37% win rate**. Focus on the promotion of this product could increase overall revenue, as it consistently performs well across sales teams.



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## Recommendations :

- . Teams with lower won rates (e.g., **Melvin Marxen**) should focus on training to improve negotiation and deal closure strategies. Mentoring by top performers like **Rocco Neubert** could help improve won rates across the board.
- . Managers with high % sales discount rates, such as **Summer Sewald** and **Dustin Brinkmann**, should review their discounting practices. Implementing a value-based sales strategy could reduce the need for high discounts, improving margins. Introduce a clear discounting policy and provide sales teams with training on value-based selling techniques.
- . Sales teams should reduce the average weeks to close deals by adopting best practices from **Rocco Neubert's** team, which has the fastest closure time. Conduct workshops on efficient deal management and follow-up techniques to minimize time spent in the "Engaging" stage.
- . Given that **Melvin Marxen's** team has **\$542K** in potential sales, focused efforts on following up and closing these deals could bring significant revenue in future quarters. Sales managers should prioritize deals in the "Engaging" stage and set clear targets for conversion within a specified time.
- . Since **GTX Pro** consistently performs well, with high sales and a strong won rate, additional marketing and sales focus on this product could drive even higher revenue. Launch targeted promotional campaigns and incentives for agents to prioritize this product in their sales efforts.