

Problem statement

Sales Tracker & RnR Dashboard

Case - Business Analytics

Problem Statement:

The objective of the sales tracker is to monitor the daily call data made by the sales team and measure conversions. Also, Crio has recently launched a Rewards and Recognition (RnR) system to celebrate outstanding performance by the sales team. The RnR dashboard is required to cleanly monitor the sales team performance on a daily basis and measure weekly and monthly performance.

Crio has 3 programs in place namely - Crio Program 1, Crio Program 2 & Crio Program 3. The sales team consists of 10 members called Point-of-contact PoC (names given in dataset) who make 4 different type of calls based on the program stage of the user: Application, Started Program, Trial Ongoing and Finished Trial.

Please follow the instructions mentioned below:

1

Dataset

Study the dataset available in the next tab and complete the task using the information below.

Success for call made by PoC is counted as "Yes" if the user moves from one stage to another. For eg., Applied to Started Program, Started Program to Trial Ongoing and so on.

Information

Call attempted is marked Yes if it is attempted by the PoC on that given day, if the PoC is able to connect to the user call connected is marked as Yes, otherwise No

The number of users reduces from one stage to another (From Applied to Started Program and so on).

Leads keep rotating at each stage between different PoCs. Eg A may call user001 at stage Applied, but J may call them at stage Trial Ongoing.

Leads may move from one stage to another even if the PoC is not able to connect to them, as other communication channels (like emails) are in place.

If the lead proceeds to the next stage without being connected, it is anyway counted as success for the POC.

The set of users in Week 1 and Week 2 have no common entries.

2

Task

The dataset above is to be presented to management to monitor the performance of various sales team PoCs to award them the various awards for the RnR. Create a dashboard for the same which meet the following requirements.

Create a Sales PoC level view for Attempted, Connected and Success based on the type of call and program

The view should have an aggregate of daily and Weekly data for each PoC for each type of call for each type of program.

Information about RnR

PoCs are awarded in three categories, once every two weeks:
1) High Attempt % 2) Highest Connect % 3) Highest Success % (stage-wise data is required for all categories with daily aggregates)

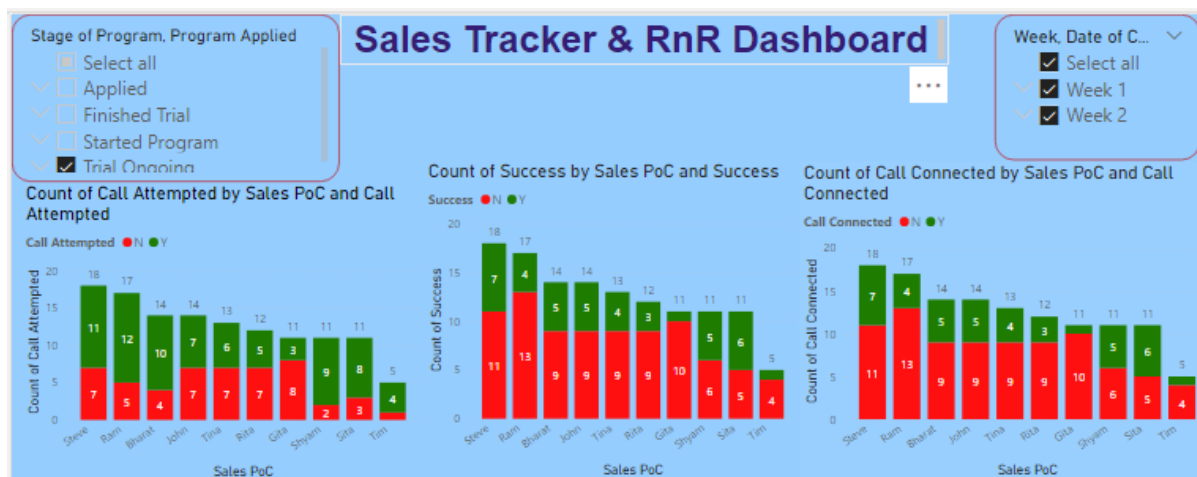
3

What according to your analysis of the dataset is the best way to analyze the performance of various PoCs assuming the effort of calling by PoC in stage Applied > Finished Trial > Started Program > Trial Ongoing ?

Report of Assignment Dataset

Data Visualization:

- Sales PoC level view for Attempted, Connected and Success has been created through stacked column chart.
- We can categorize the call data based on Program applied and stage of program through slicer in left corner of the report.
- We can also categorize the weekly and daily data basis through another slicer in right corner side of the report.

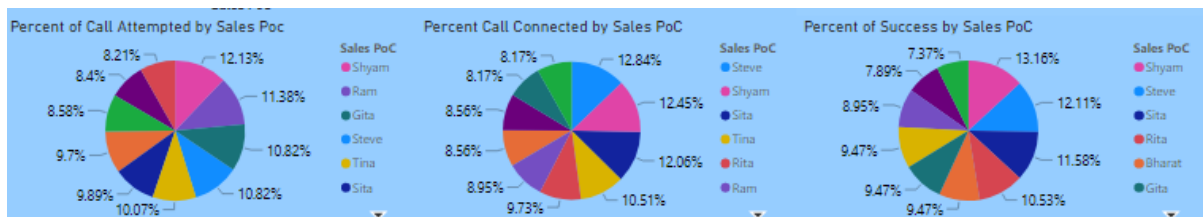


Information about RnR:

Award Winners:

Category	Applied to Program	Finished Trail	Started Program	Trail Ongoing
Highest Call Attempted %	Shaym (13.98%)	Rita & Tina (16.95%)	Gita & Ram (14.46%)	Ram (16%)
Highest Call Connected %	Sita (18.87%)	Tina (20.59%)	Gita (18.42%)	Steve (17.07%)
Highest Call Success %	Sita (18.18%)	Rita (25%)	Gita (18.31%)	Steve (17.07%)

This Data is fetched from the pie chart of the report. We can categorise and find the appropriate call percentage based on stage of program using slicers in right corner of report.



Stage of Program, Program Applied

- ☒ Select all
- ☐ Applied
- ☐ Finished Trial
- ☐ Started Program
- ☒ Trial Ongoing

Week, Date of C...

- ☒ Select all
- ☐ Week 1
- ☒ Week 2

Solution to Bonus Question

According to Bonus Question statement the effort of calling by Pocs in stages

Is **Applied > Finished Trail > Started Program > Trial Ongoing**. Hence, I assumed the weightage for each stages as **40**(Applied) > **30**(Finished Trail) > **20** (Started Program) > **10** (Trial Ongoing).

Weightage table for Each Sales PoCs:

	Applied	Finished Trial	Started Program	Trial ongoing	Total
Bharat	240	30	120	50	440
Gita	120	30	260	10	420
John	280	0	60	50	390

Ram	200	30	140	40	410
Rita	200	90	180	30	410
Shyam	400	0	200	50	650
Sita	480	30	60	60	630
Steve	360	30	120	70	580
Tim	240	60	100	10	410
Tina	120	60	180	40	400

Based on the above weightage table, we can get the performance rating of the Sales PoCs. According to the total weightage Shyam may be the best performer among the various PoCs. At the same time according to the High effort stage(Applied Stage) , Sita may be the best performer among the various Pocs.

In this analysis, the conversion rate of calls from attempting to connecting and connecting to succeed is important parameter of the Sales Pocs.

