**CRM Sales Opportunities**

**Introduction:**

B2B sales pipeline data from a fictitious company that sells computer hardware. The company specializes in selling computer hardware to large businesses.

**Task:**

**EDA + interactive dashboard that enables sales managers to track their team's quarterly performance**.

**About the dataset:**

5 CSV files

1. Accounts
2. Data\_dictionary
3. Products
4. Sales\_pipeline
5. Sales\_teams

Insights:

**Accounts –**

**Which sector has the most accounts?**

Retail has 17 accounts.

Employment has 4 accounts.

**Which office locations have the most accounts?**

USA has 71 accounts. All other locations have only 1 account.

**Which year there were the most establishments of new accounts?**

First account was established in 1979, the last one in 2017.

In years 1993 – 1997 there were the highest new establishments per year (4).

E.g. the account in Norway started in 2000 and in Italy in 2007.

**Top 10 accounts with most employees.**

|  |
| --- |
| Kan-code |
| Xx-holding |
| Initech |
| Ganjaflex |
| Scotfind |
| Hottechi |
| Zotware |
| Konex |
| Dontechi |
| Y-corporation |

The highest count of employees has account Kan-code (34288), USA, sector: software.

The least number of employees (9) has account Condax in USA, sector: medical.

**Which office locations has the highest revenue?**

USA location has the highest revenue, as there are 71 accounts. In all other locations there is only 1 account per location.

**Which sector has the highest revenue?**

Technology has the highest revenue, services have the lowest revenue.

**Top ten accounts with highest revenue.**

|  |
| --- |
| Kan-code |
| Hottechi |
| Konex |
| Xx-holding |
| Initech |
| Scotfind |
| Treequote |
| Ganjaflex |
| Fasehatice |
| Zotware |

**Highest Average revenue per location and sector:**

1.Korea – technology

2. Japan – retail

3. USA – software

**Lowest Average revenue per location and sector:**

China - technology

**Highest Average revenue per sector in USA:**

1. Software
2. Telecommunications
3. Finance

**Lowest Average revenue per sector in USA:**

1. Services
2. Retail
3. Marketing

**Sales pipeline -**

**Number of opportunities per sales agent:**

Highest opportunity counts:

1. Darcel Schlecht – 747 opportunities
2. Vicki Laflamme – 451 opportunities
3. Anna Snelling – 448 opportunities

Lowest opportunity counts:

1. Wilburn Farren – 110 opportunities
2. Garret Kinder – 123 opportunities
3. Rosalina Dieter and Rosie Papadopoulos – 160 opportunities

**Revenue from closed deals:**

Highest

1. Darcel Schlecht

2. Vicki Laflamme

3. Kary Hendrixson

Lowest

1. Violet Mclelland

2. Wilburn Farren

3. Niesha Huffines

**Average Revenue in Closed Deals:**

Highest:

1. Elease Gluck

2. Rosalina Dieter

3. Darcel Schlecht

Lowest

1. Violet Mclelland

2. Versie Hillebrand

3. Anna Snelling

**No of Opportunities per Sales Agent and per Sales Stage**

Won Deals:

1. Darcel Schlecht - 349 deals

2. Vicki Laflamme – 221 deals

3. Kary Hendrixson – 209 deals

Lost Deals:

1. Darcel Schlecht – 204 deals
2. Anna Schnelling – 128 deals
3. Kary Hendrixson – 126 deals

Engaging:

1. Vicki Laflamme, 104 deals

2. Kary Hendrixson, 103 deals

3. Kami Bicknell, 90 deals

Prospecting:

1. Darcel Schlecht, 111 deals

2. Anna Snelling, 55 deals

3. Marty Freudenburg, 54 deals

**Products Per Deal Stage**

WON

1. GTX Basic, 915
2. MG Special, 793
3. GTX Pro, 729

LOST

1. GTX Basic, 521
2. MG Advances and MG Special, 430 each product
3. GTX Pro, 418

The most winning product is GTX Basic and it is also the product with most opportunities ID count.

There is no product, which would be more losing than winning. All products have higher winning count than losing count.

**Close Value per Sales Manager**

Highest:

1. Melvin Marxen, 2 251 930

2. Summer Sewald, 1 964 750

3. Rocco Neubert, 1 960 545

Lowest:

1. Dustin Brinkmann, 1 094 363

2. Cara Losch, 1 130 049

3. Celia Rouche, 1 603 897

**Sales Managers Performance per Quartal**

Highest:

1. Melvin Marxen, 2 251 930 yearly performance, best in Q3 = 767 754

2. Summer Sewald, 1 964 750 yearly performance, best in Q2= 601 790

3. Rocco Neubert, 1 960 545 yearly performance, best in Q2= 646 131

Lowest:

1. Dustin Brinkmann, 1 094 363 yearly performance, best in Q2=365 987, worst in Q3 =258 448, as Q1 is only being analyzed in March

2. Cara Losch, 1 130 049 yearly performance, best in Q2=370 692, worst in Q3=330 820 (Q1 is not relevant here)

3. Celia Rouche, 1 603 897 yearly performance, best in Q2= 510 177, worst in Q4=430212 (Q1 is not relevant here)

It seems, that Q2 is the best quartal in year for all sales managers and their sales agents.

**Average Time duration of Deals per Sales Agent**

From lowest:

1. Cecily Lampkin with only 38,74 days
2. Boris Faz with 43,27 days
3. Zane Levy with 44,41 days

Average days of closing deals for all sales agents: 47,98 days

**Products-**

The most expensive product:

GTK 500

The least expensive product:

MG Special

The most selling product:

GTX Basic

**USA only:**

**The most No of Employees:**

1. Kan-code – 34228
2. Xx- holding – 20293
3. Initech – 20275
4. Scotfind – 16780
5. Zotware - 13809

**The highest revenue:**

1. Kan-code (software) – 11698,03

2. Konex (technology) – 7708,38

3. Xx-holding (finance) – 7537, 24

**Industry share in %:**

Software – 19,03%

Retail – 14,28%

Telecommunications – 11,90%

Other Tables as Data Dictionary and Sales teams are for informational purposes only.