Client Insights & Interaction Report

- Created by: Arti Kalyan Bankar
- Date: 21-05-2025

Project Overview

- This project analyzes client interaction, revenue contribution, and engagement using a Power BI dashboard. The data includes daily revenue, client meetings, and sales/analyst involvement.

Objectives

- - Analyze yearly revenue trends per client
- - Measure time spent by Sales Representatives
- - Assess Analyst-client engagement
- - Track country-wise revenue trends

Data Sources

- 1. Daily Revenue Sheet: Revenue by date and client
- 2. MIS Data Sheet: Client meetings, countries, analyst and sales info

Tools & Technologies

- - Power BI Desktop
- - Power Query (ETL)
- - DAX (Calculated Columns)
- - Data Modeling (One-to-Many Relationships)

Yearly Revenue Trend per Client

- - Visual: Line Chart
- - Insight: Tracks client growth over time
- - Feature: Dropdown to filter by client

Hours Spent by Sales Representatives

- - Visual: Clustered Bar Chart
- - Insight: Time allocation by sales rep per client
- - Helps identify key accounts and sales effort

Hours Spent by Analysts

- - Visual: Stacked Bar Chart
- - Insight: Analyst engagement across clients
- - Detects over/under-utilized analysts

Country-wise Revenue Trend

- - Visual: Line Chart with slicer
- - Insight: Regional revenue performance over years
- - Identifies high-growth countries like US, India

Challenges Faced

- - Duplicate client codes caused model issues
- - Slow performance during large merges
- - Inconsistent text formatting (trim, case, spaces)

Outcome & Impact

- - Identified top-performing clients and regions
- - Improved resource planning
- - Enabled visual storytelling for decision-making

Future Enhancements

- - Add dynamic KPIs (Top Clients, YoY Growth)
- - Forecast future revenue trends
- - Add drill-through for meeting-level insights

Appendix

- Key Fields: Client Code, Revenue, Date, Analyst, Sales Rep, Country
- Calculated Fields: Duration (hrs), Year