Quote-to-Sale Performance Dashboard
Submitted by: Bharadwaj Duvvuru
Role Targeted: Sales Analytics Specialist
Tools Used: Power BI, Excel, DAX
Duration: 10 July 2025

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1. Objective
To simulate a real-world sales analytics scenario by analyzing quote-to-sale performance data, uncover patterns in sales conversion, evaluate discount effectiveness, and present actionable insights to leadership through an executive Power BI dashboard.

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2. Data Overview
Dataset: 500 records representing sales quotes for mobility-related products such as Mobility Scooters, Power Chairs, Wheelchairs, and Accessories.
Key Columns:

- Quote Date, Sale Date
- Product Category
- Region, Sales Rep
- Quote Value, Discount Rate
- Final Sale Value, Conversion Status

Data was cleaned, transformed, and enriched in Excel and Power BI to include:

- Sales Cycle Days
- Discount Buckets
- Quote vs Sale Value Difference
- Conversion Status (Converted / Not Converted)

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3. Business Questions Answered

1. What is the overall quote-to-sale conversion rate?

Overall Quote-to-Sale Conversion Rate	
Order Status	**Percentage Quote**
Converted	65.80%
Not Converted	34.20%
Grand Total	**100%**

2. Which product categories convert the best?

Conversion Rate by Product Category	
Category	**percentage Converted as Sales**
Accessories	19.76%
Mobility Scooters	31.00%
Power Chairs	25.53%
Wheelchairs	23.71%
Grand Total	**100%**

3. How does the discount percentage impact conversion?

Impact of Discount Buckets on	
Discount	Total Converted
0-5%	73
11-15%	69
16-20%	60
21-25%	57
6-10%	70
Grand Total	**329**

4. Are customers paying more or less than quoted?

Actual Sale Value Difference by Product	
Row Labels	Average of Quote_vs_Sale_Diff
Accessories	$48.65
Mobility Scooters	$40.40
Power Chairs	$56.81
Wheelchairs	$63.03

5. What is the average sales cycle time?

Average Sales Cycle by Product Type	
Category	Avg Sales Cycle in Days
Accessories	17
Mobility Scooters	17
Power Chairs	17
Wheelchairs	15

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4. KPIs Created (via DAX)

- **Total Quotes** = COUNT(Quote_ID)
- **Total Sales** = SUM(Converted)
- **Conversion Rate (%)** = DIVIDE(SUM(Converted), COUNT(Quote_ID))
- **Average Discount %** = AVERAGE(Discount_Rate)
- **Average Sales Cycle Days** = AVERAGE(Sales_Cycle_Days)
- **Avg Quote vs Sale Diff** = AVERAGE(Quote_vs_Sale_Diff)

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5. Power BI Visuals

- **Top KPI Cards:** Total Quotes, Sales, Conversion% %, Discount% %, Avg Sales Cycle
- **Bar Chart 1:** Conversion Rate by Product Category
- **Bar Chart 2:** Conversion Rate by Discount Bucket
- **Bar Chart 3:** Avg Quote vs Actual Sale Difference by Product
- **Line Chart:** Monthly Sales Revenue Trend
- **Slicers:** Product Category, Region, Sales Rep

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6. Insights Derived

- **Overall conversion rate:** 65.8% (solid, but improvement potential exists)
- **Top performing category:** Mobility Scooters (conversion) vs Wheelchairs (margin uplift)

- **Highest discounts (21-25%) didn't improve conversion**, suggesting over-discounting risk
- **Sales cycle:** 16.4 days average to convert a quote to a sale
- **Customers frequently paid more than quoted** (average uplift up to $63 on Wheelchairs)

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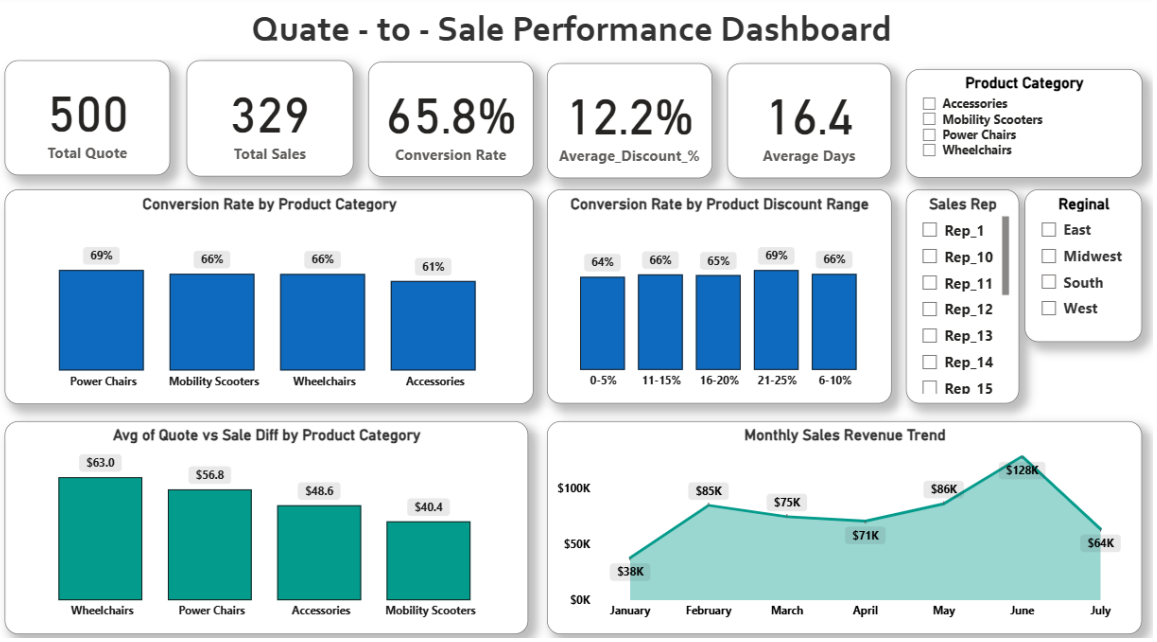
6. Final Dashboard Preview



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8. Outcome & Relevance

This project reflects:

- Ability to independently analyze messy sales data
- Translate data into actionable executive insights
- Build polished Power BI dashboards
- Apply sales, pricing, and forecasting logic to real-world decisions

It demonstrates direct alignment with the Sales Analytics Specialist role at your company.

Thank you for your time and consideration.

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