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PROBLEM

CLIENT

DISPUTES

"... dissatisfaction with Yellevate's services and refusing to pay for them."

All services are completed

Quality of work is not an issue.

"...nearly 20% of disputes resulted in payment opt-out."

Yellevate believes most disputes are from contract technicalities.



WHAT WE DID.

ASK

Project Brief: Understanding all about the company.



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PREPARE

SQL: Data Cleaning
Excel: Format the data.
Create table, proper
headers, neat visual.

PROCESS

Excel: Solve data analysis goals and define the problem through data.



ANALYZE

Excel: Analyze data trends with the use of pivots and other analysis tools and create insights.

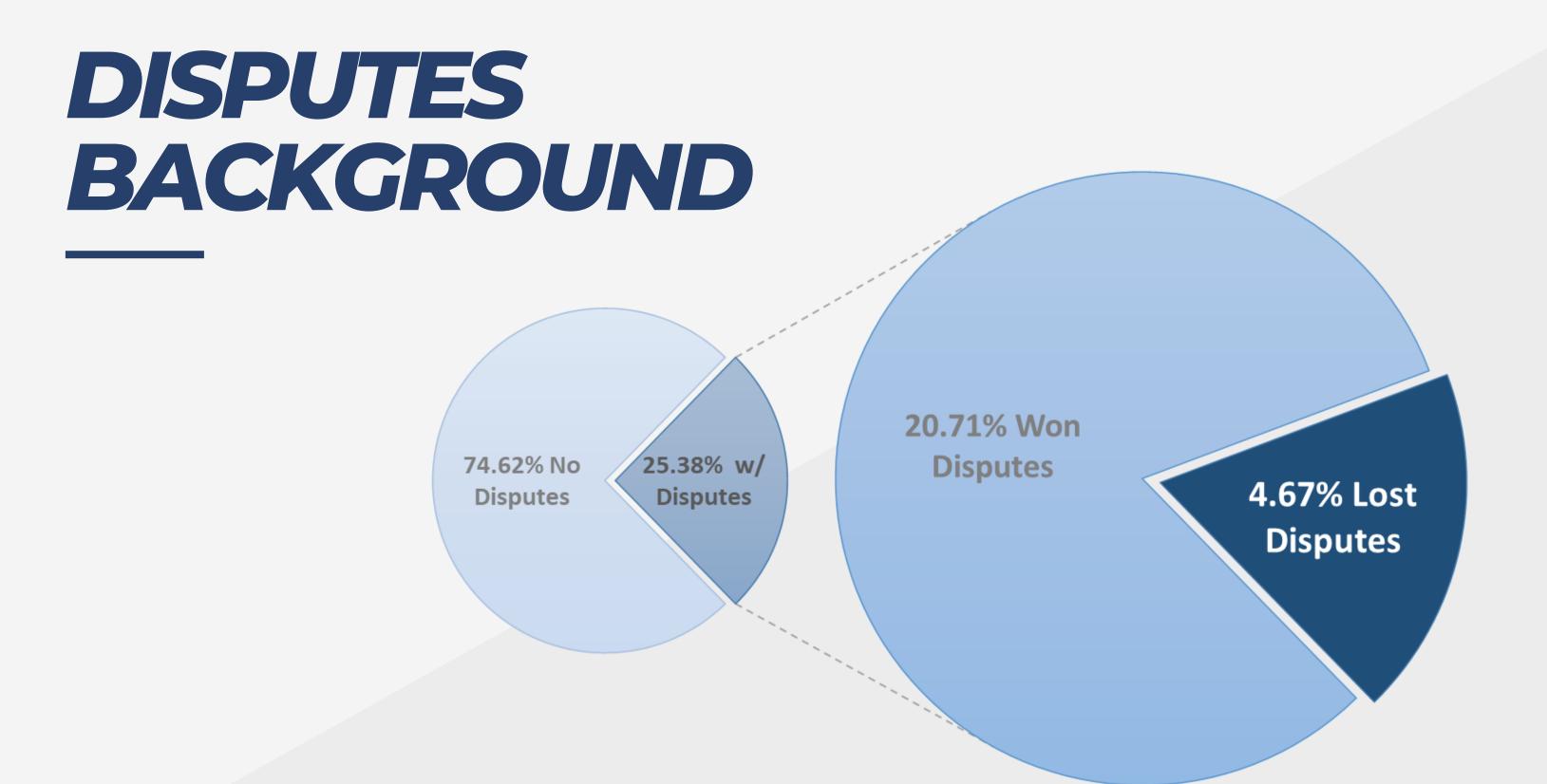
SHARE

Excel: Transform insights to visuals Presentation: Creation of data story



ACT

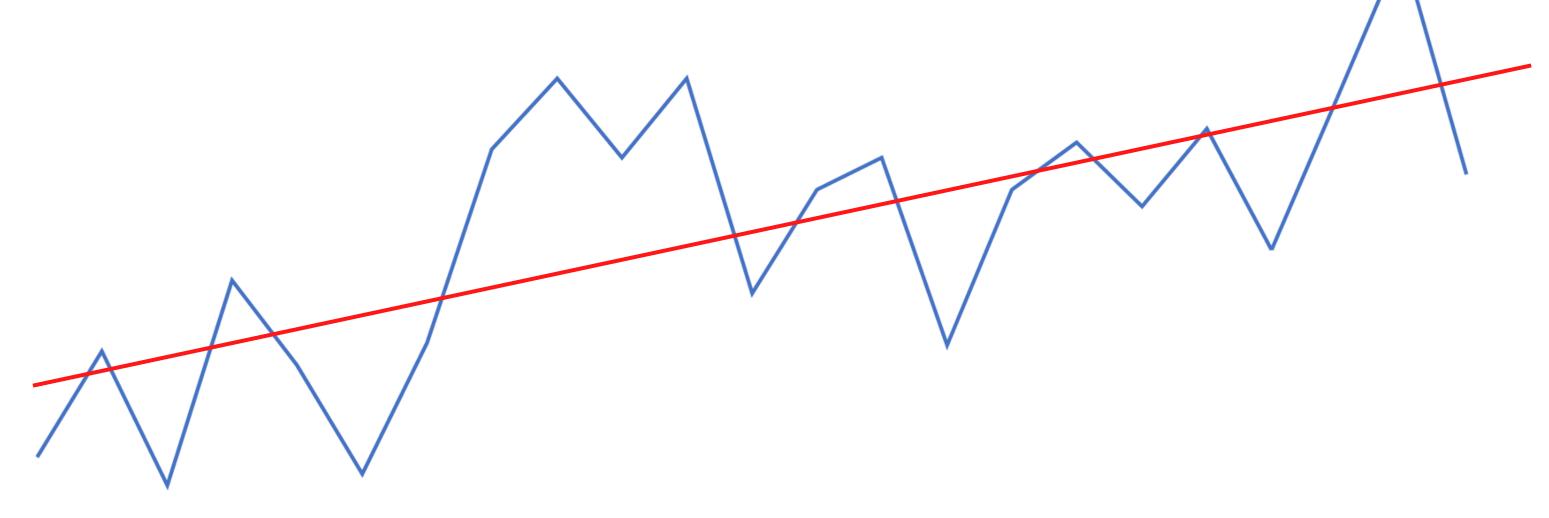
Presentation:
Recommend
actionable items to
address the problem.



From the total \$14M Revenue of the company, almost 5% or equivalent to \$690,167 Annual Revenue Lost from disputes.

DISPUTES BACKGROUND

We have an average of 25 raised disputes per month and there is an observed UPTREND pattern in the LOST resulting to payment opt-out



DISPUTES BACKGROUND

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USD 526,264



26 Days

Average processing time in which the invoices are settled



36 Days

average processing time in which the disputes are settled



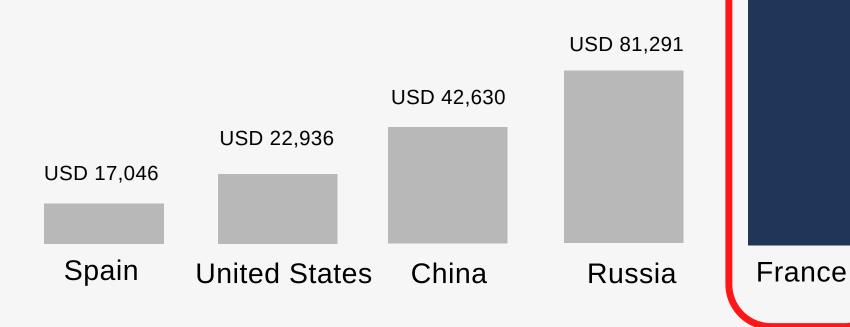
76.0%

76 out of 100 served companies have raised disputes against the company



17.69%

101 out of 571 number of disputes raised against the company that resulted in a payment opt-out.



For the five countries that the company are servicing, **France** has been identified with the highest losses from the disputes (in USD)

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WHATS WITH FRANCE?

From 23 companies in France, only 2 haven't raised disputes against Yellevate and almost 40% out of 561 total invoices had disputes; it has contributed about 76% of the total lost disputes. (\$526,264)

Percentage of Total loss in revenue 76.25%

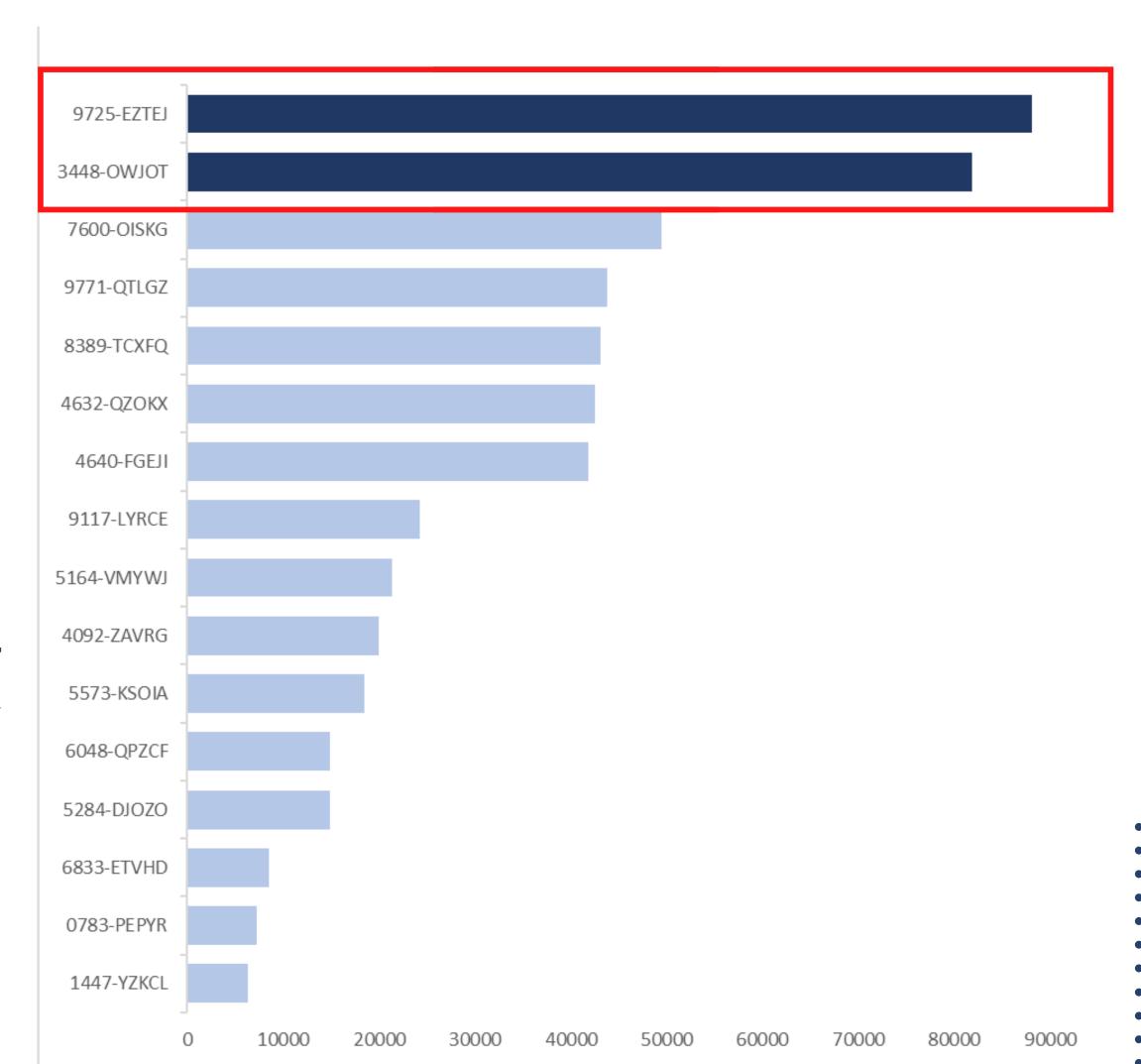
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COMPANIES FROM FRANCE

Top 2 companies contributes to 25% or equivalent to \$169,907 total revenue lost

What's Common With 9725-EZTEJ and 3448-OWJOT

Both have more than 90% of their total invoices have disputes and raises with a minimum frequency of once every 2 months.



INSIGHTS

- The market found out that Yellevate is common to have disputes.
- It has been a norm for companies to raise disputes on a regular basis.
- Customers seem to exploit Yellevate's contract Loophole.
- No sense in continuing services with Yellevate if they are dissatisfied with the service.



RECOMMENDATIONS

Service Level Agreement (SLA) Contract

- Upon every Purchase Order, there should be an equivalent service level agreement **SIGNED** between the company and customer.
- This should outline **KEY PERFORMANCE INDICATORS** supported by success metrics and specific obligations between the organizations.
- It should include ALL SERVICES that have been decided upon with DEFINED TIME FRAMES.
- Get a **LEGAL FIRM** to help create and consult a **flawless SLA** format to be used as the main reference to every transaction with minimal revisions per customer and type of service to be rendered.

Conduct Credit Limit Investigation

• Hire a contractor to conduct credit investigation for reference on contract SLAs.



RECOMMENDATIONS

Apply Credit Limit

• Set a particular credit line per customer based on Credit Investigation Report and payment history. If CI Report and history are good, then a higher credit limit shall be granted and vice versa.

50% Downpayment Policy to All Customers

• Inclusion of 50% Downpayment Policy in the contract that shall be paid by the customer at the time of placement of a purchase order.



Cash Before Delivery (CBD) Policy for transactions below \$6000.

 Apply CBD payment terms to invoice amounts below \$6000 in this way the company will not be dealing with disputes from lower amounts. \$169,223 **24.5%**