



CRM Sales Opportunities Analysis

A Data-Driven Approach to Evaluating Sales Team Performance and Trends



CRM Sales Opportunities Analysis

A Comprehensive Workflow and Insights

Algora.io



OBJECTIVE



Analyze sales team performance



Identify opportunities for growth and improvement



Gain insights into product performance and trends



DATASET OVERVIEW

4 Tables:

Accounts,
Products,
Sales Teams, and
Sales Pipeline

Key Metrics Analyzed:

revenue,
win rates,
deal stages, and
quarterly trends





METHODOLOGY

Workflow Steps

1

Table and model building on PostgreSQL

Designed robust tables and a structured data model to organize data effectively.

2

Creating relationships & views between tables for seamless analysis

Linked tables and developed SQL views to enhance data accessibility and integration.

3

Calculating performance metrics (e.g., win rates, deal volume)

Implemented advanced calculations to assess sales performance and trends.

4

Visualizing insights with Power BI charts and KPIs

Developed interactive dashboards showcasing key metrics and actionable insights.



POSTGRESQL ANALYSIS

Key insights were drawn by comparing total revenue, the number of deals, and win rates across sales teams, quarters, and product performance categories using PostgreSQL queries.



Sales Team Performance

Total revenue and win rate per sales team and agent



Sales Agent Insights

Average deal cycle time (days between creation and close date)



Quarterly Trends

Quarterly performance metrics (total revenue, deals closed, win rate)



Product Performance

Product performance metrics (win rate, revenue contribution)



POWER BI ANALYSIS

Shared insights with stakeholders, focusing on performance optimization, deal conversion strategies, and market trends based on the analysis by creating visuals using Power BI.



Sales Team Performance

Bar chart comparing team revenue and win rates
Identified underperforming teams requiring support



Sales Agent Insights

Table showing agent KPIs (deals closed, revenue, win rate)
Highlighted agents excelling in revenue generation



Quarterly Trends

Line chart showing monthly revenue, deal volume, and win rate trends
Presented seasonal patterns in deal closures



Product Performance


Funnel chart showing win rates and revenue by product category
Identified top-performing product categories by revenue




QUERIES

Calculating key metrics from data...






```
-- Total revenue and win rate per sales agent
SELECT
    st.sales_agent,
    st.manager,
    SUM(sp.close_value) AS total_revenue,
    COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) AS won_count,
    COUNT(sp.opportunity_id) AS opportunity_count,
    COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) * 100.00 / COUNT(sp.opportunity_id) AS win_rate
FROM
    sales_pipeline AS sp
JOIN
    sales_teams AS st
ON
    sp.sales_agent = st.sales_agent
WHERE
    sp.deal_stage IN ('Won', 'Lost')
GROUP BY
    st.sales_agent, st.manager
ORDER BY
    total_revenue
DESC;
```



```
-- Total revenue and win rate per sales team and agent
SELECT
  st.*,
  SUM(sp.close_value) AS total_revenue,
  COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) AS won_count,
  COUNT(sp.opportunity_id) AS opportunity_count,
  COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) * 100.00 / COUNT(sp.opportunity_id) AS win_rate
FROM
  sales_pipeline AS sp
JOIN
  sales_teams AS st
ON
  sp.sales_agent = st.sales_agent
WHERE
  sp.deal_stage IN ('Won', 'Lost')
GROUP BY
  st.sales_agent,
  st.manager
ORDER BY
  total_revenue
DESC;
```



```
-- Average deal cycle time (days between creation and close date)
SELECT
    AVG(sp.close_date - sp.engage_date) AS avg_deal_cycle_time_days
FROM
    sales_pipeline AS sp
WHERE
    sp.deal_stage IN ('Won', 'Lost');
```



```
-- Quarterly performance metrics (total revenue, deals closed, win rate)
SELECT
    DATE_PART('year', sp.close_date) AS year,
    DATE_PART('quarter', sp.close_date) AS quarter,
    SUM(sp.close_value) AS total_revenue,
    COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) AS deals_closed,
    COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) * 100.00 / COUNT(sp.opportunity_id) AS win_rate
FROM
    sales_pipeline AS sp
WHERE
    sp.deal_stage IN ('Won', 'Lost')
GROUP BY
    DATE_PART('year', sp.close_date), DATE_PART('quarter', sp.close_date)
ORDER BY
    year,
    quarter;
```



```
-- Product performance metrics (win rate, revenue contribution)
SELECT
    p.product,
    COUNT(CASE WHEN sp.deal_stage = 'Won' THEN 1 END) * 100.00 / COUNT(sp.opportunity_id) AS win_rate,
    SUM(sp.close_value) AS revenue_contribution,
    SUM(sp.close_value) * 100.00 / (SELECT SUM(close_value) FROM sales_pipeline WHERE deal_stage =
'Won') AS revenue_percentage
FROM
    sales_pipeline AS sp
JOIN
    products AS p
ON
    sp.product = p.product
WHERE
    sp.deal_stage IN ('Won', 'Lost')
GROUP BY
    p.product
ORDER BY
    revenue_contribution
DESC;
```



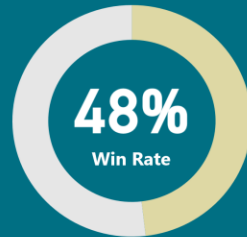

DASHBOARD

Sharing insights from visuals...



CRM Sales Dashboard

Tech-Sphere Solutions



Sales Manager

All

Regional Office

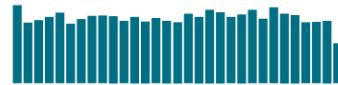
All

Good Morning, Manager

Total Opportunities

8,800

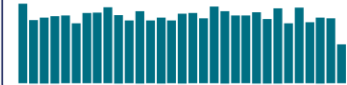
vs PQ
0.02%



Opportunities Won

4,238

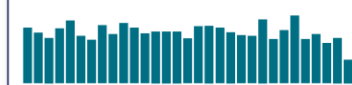
Win rate: 48%
vs PQ
17.69%



Opportunities Lost

2,473

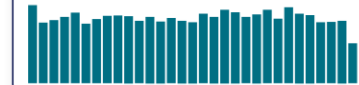
Lost rate: 28%
vs PQ
20.05%



Opportunities in Pipeline

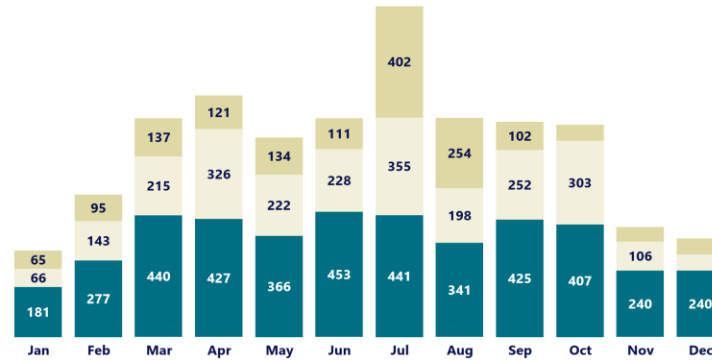
1,589

vs PQ
7.80%



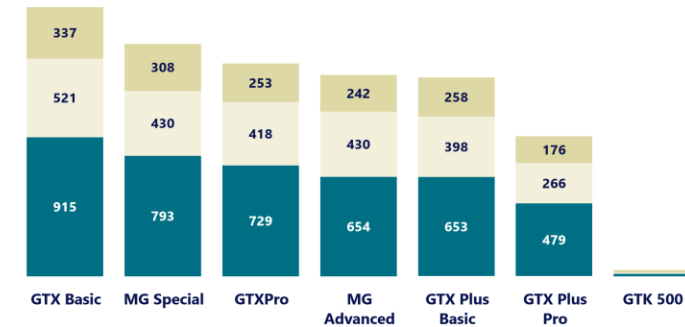
Opportunities by Months

● Won ● Lost ● Pipeline



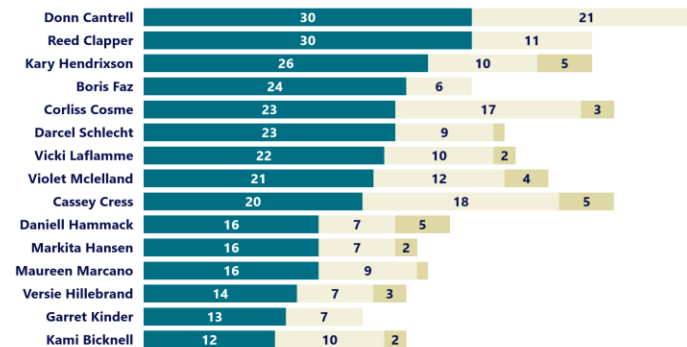
Opportunities by Product

● Won ● Lost ● Pipeline



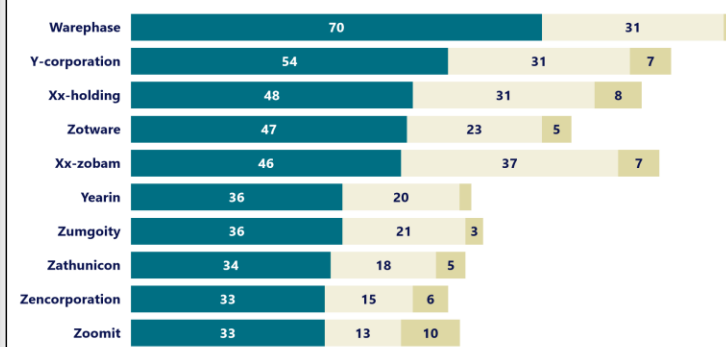
Opportunities by Sales Agent

● Won ● Lost ● Pipeline



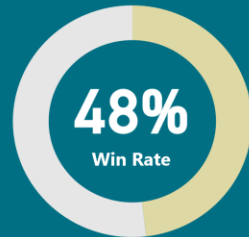
Opportunities by Account

● Won ● Lost ● Pipeline



CRM Sales Dashboard

Tech-Sphere Solutions



Sales Manager

All

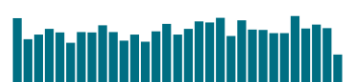
Regional Office

All

Good Morning, Manager

Total Revenue

\$10.01M vs PQ 38.91%

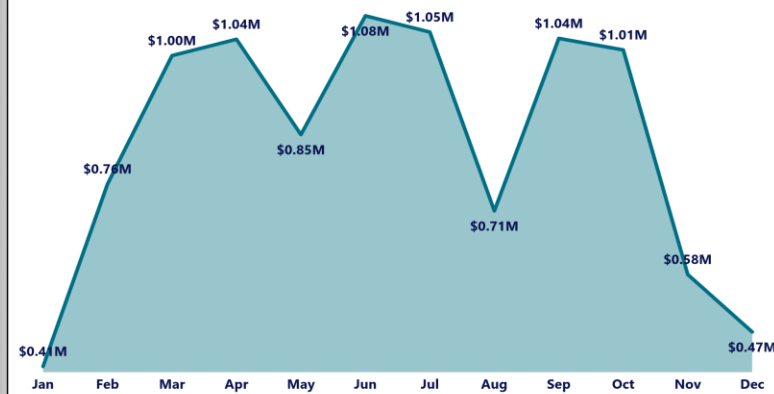


Total Accounts

85

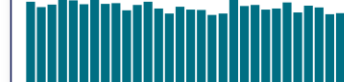


Revenue by Months



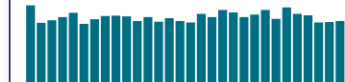
Average Day to Close

48

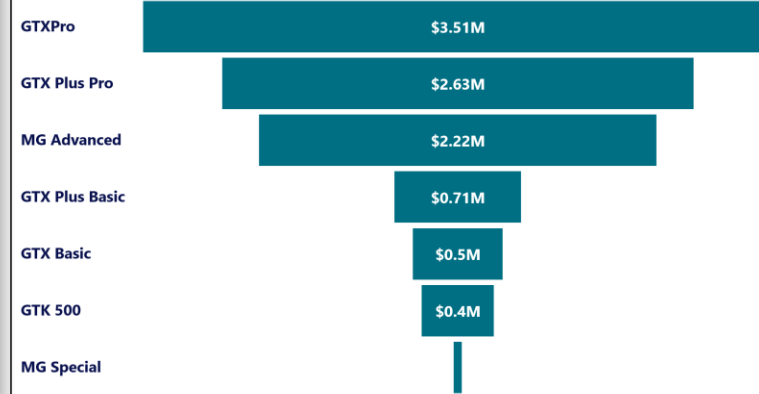


Average Close Value

\$1.49K vs PQ -2.18%

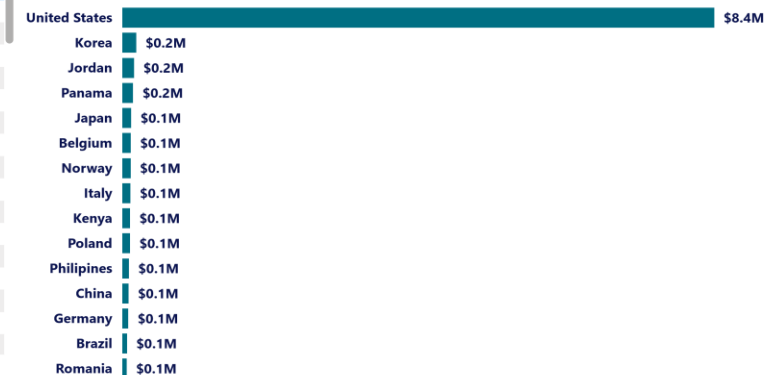


Revenue by Product



Account	Anna Snelling	Boris Faz	Cassey Cress	Cecily Lampkin	Corliss Cosme	Daniell
Acme Corporation		\$9,142	\$14,617		\$577	
Betasoloin		\$7,661	\$13,982		\$18,905	
Betatech	\$11,340			\$7,262		
Bioholding	\$12,382			\$1,324		
Bioplex		\$5,324	\$13,976		\$1,017	
Blackzim						
Bluth Company		\$5,335	\$6,163		\$1,773	
Bubba Gump		\$54	\$18,345		\$8,637	
Cancity	\$1,496			\$5,735		
Cheers						
Codehow	\$22,479			\$7,765		
Condax	\$1,572	\$5,166	\$9,021	\$47	\$6,866	
Conecom	\$4,186			\$6,250		
Dalttechnology						
dambase	\$21,021			\$7,679		
Domzoom	\$6,639			\$10,968		
Total	\$275,056	\$261,631	\$450,489	\$229,800	\$421,036	

Revenue by Office Location






MEET OUR SALES TEAM

*Leaders are committed to
making an impact...*





964

Opportunities

50%


Win Rate

\$1.13M

Revenue

Sales Manager,
CARA
LOSCH

Cara's leadership in embracing data-driven strategies has set the benchmark for team performance. She played a pivotal role in optimizing client acquisition approaches during the analysis.



1,296

Opportunities

47%

Win Rate


\$1.60M

Revenue



Sales Manager,
CELIA
ROUCHE

With a knack for closing tough deals, Celia is a powerhouse in strategic negotiations. Her ability to identify growth opportunities contributed to key insights in the project.



1,583

Opportunities

47%

Win Rate


\$1.09M

Revenue



Sales Manager,
DUSTIN
BRINKMANN

Dustin's analytical mindset shines in his attention to detail, ensuring accurate deal tracking and revenue forecasting. His collaboration enhanced the project's precision.



1,929

Opportunities

46%

Win Rate


\$2.25M

Revenue



Sales Manager,
MELVIN
MARXEN

A specialist in building long-term client relationships, Melvin contributed unique perspectives on customer retention and its role in revenue stability.



1,327

Opportunities

52%

Win Rate

\$1.96M

Revenue



Sales Manager,
ROCCO
NEUBERT

Known for his innovative solutions, Rocco's creative problem-solving added depth to the product performance insights, making him a vital contributor to the analysis.



1,701

Opportunities

49%

Win Rate

\$1.96M

Revenue



Sales Manager,
SUMMER
SEWALD

Summer's collaborative spirit and efficiency in managing cross-functional teams brought cohesion to the sales pipeline process, driving actionable recommendations.



RECOMMENDATION

- Target training for underperforming teams
- Strategic focus on high-revenue products
- Seasonal strategy adjustments based on trends



THANK YOU!

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