

Advent Technology Assignment 1:

MicroStrategy Sales Force Analysis Module



This module is designed to provide deep insight into the entire sales process. This allows users to increase lead conversions, optimize product lines, take advantage of the organization's most successful sales practices and improve the sales organization's effectiveness.

As Vice President of Sales for AdVent Technology, you are preparing to visit some of the sales offices on the Southern USA. AdVent manufactures computer equipment that is sold in a business-to-business environment. The sales force is structured in regions, United States, Canada and Europe, and within those regions are sales districts containing multiple reps. United States includes three districts: Northeast USA, Central USA and Southern USA.

Along with the computer equipment that AdVent sales, it also offers consulting services for system design and implementation.

Sales for AdVent have been down, and as VP of Sales, you are very interested in getting things going in the right direction. So with that in mind, there are many tasks you would like to get accomplished on your trip.

Morale is very important to keeping a sales force focused. On your trip to the Southern USA offices, you would like to congratulate any rep who has landed a big deal for the company in 2009 Q4. Obviously you need to know who those reps are and what the deal mount was in order to put together a speech while visiting the office.

1. Make a list of any rep that is in the Southern USA office who has landed a deal that was large enough to be in the Top 10 deals in 2009 Q4 for the company. In the report, display Opportunity, Account, Sales Representative, Opportunity Close Date, Primary Competitor and Deal Size.

An important role for the VP of Sales is to actually help generate sales. Another thing you would like to accomplish is to conduct a strategy session with sales mangers and reps. During this strategy session, you would like to review opportunities in the pipeline and solicit feedback from the sales staff to determine if there is anything you can do to help close the sale.

2. Generate a list of the projects in the current pipeline for Southern USA that shows who the rep working on the project is, as well as the customer and expected worth of the project (2010 Q1). In the report, display Current Opportunity Status, Sales Representative, Opportunities and Opportunity Size.

It is the VP of Sales' responsibility to conduct reviews of the district managers while visiting their offices this time of year. These reviews focus on last quarter's sales results and are used to determine areas for improvement as the year moves forward. The Southern USA district managers get a report that breaks down their performance by revenue and quota. Not only are you interested in the Southern USA, but you like to see all of the districts' results so that you can compare all of the districts in US Region order to gauge performance.

3. Generate a report that shows all districts' Current Pipeline vs. Quota for US Region for easy comparison for (2010 Q1). In the report, display metrics relevant to this report, and columns as Northern, Central and Southern USA, and Total.