Empowering Decisions:
Data-Driven Insights for Bolt Business

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Introduction

In this report, we delve into the analysis of two key datasets pertaining to the business's operations. The aim is to uncover actionable insights that will inform strategic decisions and drive business growth. The datasets include Acquisition Data, detailing new company registrations, and Orders Data, providing insights into revenue generation and order fulfilment.

Through rigorous analysis, we aim to provide stakeholders with valuable insights into

- Market Trends
- Acquisition Performance,
- Revenue Performance, and
- Operational Efficiency.

These insights will enable informed decision-making and strategic planning to enhance the business's competitive edge and drive sustainable growth.

Objective

The objective of this presentation includes:

- Develop a performance report aided by a dashboard that captures key metrics to ensure the business stays competitive.

- Evaluate the performance of the various variables in relation to the key KPIs.

- Suggest actionable insights to the stakeholders to guide the eventual decision making.

Methodology

As the aim of this presentation is to provide the business with a competitive advantage through informed decision, the methodology employed is rigorous to ensure that our findings are grounded in empirical evidence and can serve as a reliable basis for strategic decision-making.

Requirement Gathering For Case Study	Data Ingestion	Visual Development (Dashboard)	Analysis	Recommendation
Identify possible insights and KPIs that can be generated from the available datasets.	Ingest data into a visualization software and ensure 99% accuracy.	Develop visuals to generate insights identified from requirement gathering	Carryout statistical and trend analysis using empirical evidence.	Recommend actionable solutions as a decision criteria.

Methodology Cont'd

Profitability and operational efficiency is at the heart of business operations and from the variables in the dataset, the obvious metrics to track these two important concepts and generate insights for the next phase of competitive advantage would include:

1. Revenue performance
   a) Regional, Channel, and Segmentation revenue order performance.
   b) Average Revenue per order.
   c) Month and Yearly Recurring Revenue.
   d) Month and Yearly Revenue Growth Rate.

2. Acquisition Performance
   a) Monthly Acquisition volume.
   b) Monthly Regional, Channel, and Segmentation acquisition performance.
   c) Trend analysis.

Figure 1

Findings From Revenue Performance Overview

1. **Revenue and Order Metrics:**
   - Total Revenue: The business has generated an impressive **10.57 million** in revenue during this period.
   - Order Volume: Approximately **1.95 million** orders have been successfully completed.
   - Average Revenue per Order: Across the same date range, the business achieved an average revenue of **5.43** per order.

2. **Revenue Trajectory:**
   - The revenue trajectory has been consistently upward. Starting from a modest **14,451** in January 2022, it has grown exponentially to achieving **615,471** by March 2024.

3. **Month-on-Month Growth:**
   - The recurring revenue exhibits positive momentum, with sustained growth in most months. Only six months between January 2022 and March 2024 deviated from this trend.

4. **Top Performing Locations:**
   - The lion's share of the revenue—**61%**—emanates from three key locations: **Veridia**, **Valoria**, and **Aquilonia**. These locations have contributed significantly, with figures surpassing **1.91 million** each.

5. **Top Performing Segments:**
   - The top performing segment is **T3** with **4.66 million** in revenue, followed by **T2** with **2.47 million** and **T1** capping off the top 3 with a revenue of **1.88 million.**

6. **Acquisition Channels:**
   - The Outreach acquisition channel stands out, accounting for over **63%** of the total revenue during the review period. This dominance sets it apart from other acquisition channels with **2.33 million** generated by Marketing and **1.56 million** generated by Organic.

7. **Year-on-Year Performance:**
   - 2023 was a standout year, achieving remarkable growth with above **140%** increase in revenue compared to 2022.
   - Also, early data for 2024 suggests that the business may face challenges in surpassing the exceptional performance of 2023.

Drill-Down Revenue Findings

- The Outreach acquisition channel stands out as the primary revenue driver, contributing significantly to the business's overall success. However, a deeper dive into individual channel performances reveals intriguing nuances. The Marketing channel emerges as a potent force, generating revenue exceeding **673,000** which remarkably accounts for **47%** of **Lumina's** total revenue as seen in figure 2. This suggests that the the business' marketing channel acquisition model experienced positive alignment with customers within the Lumina region.
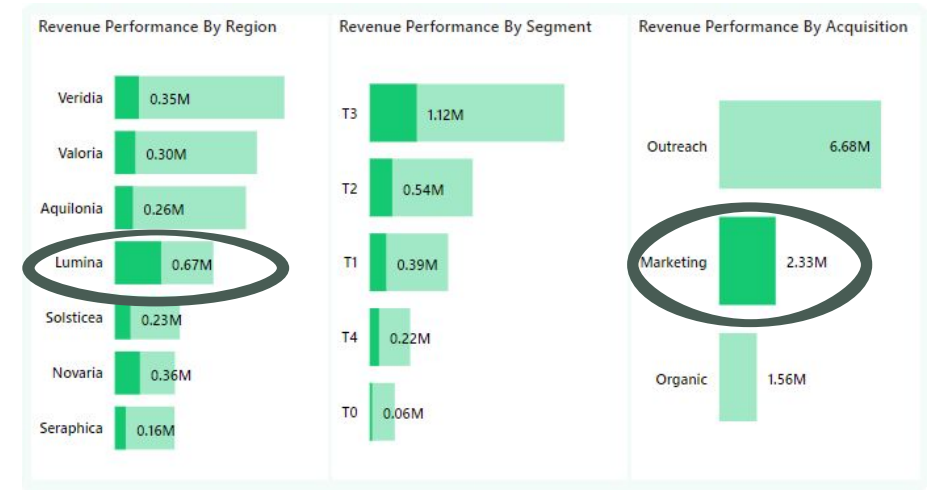
- Despite being among the top three overall revenue-generating regions, **Valoria** and **Aquilonia** alongside Novaria exhibit subdued performance in the context of the organic acquisition channel. This suggest that these regions have not fully capitalized on the potential impact of organic acquisition channel. This is illustrated in figure 3.
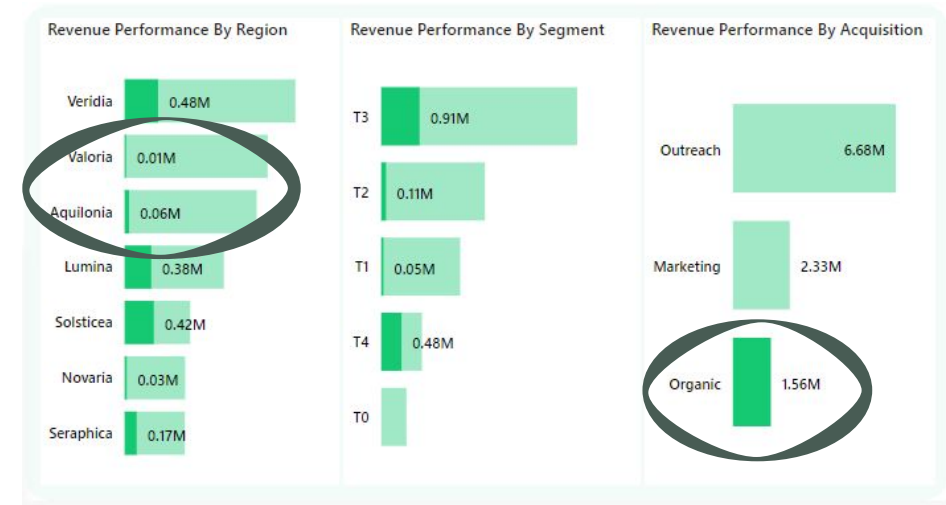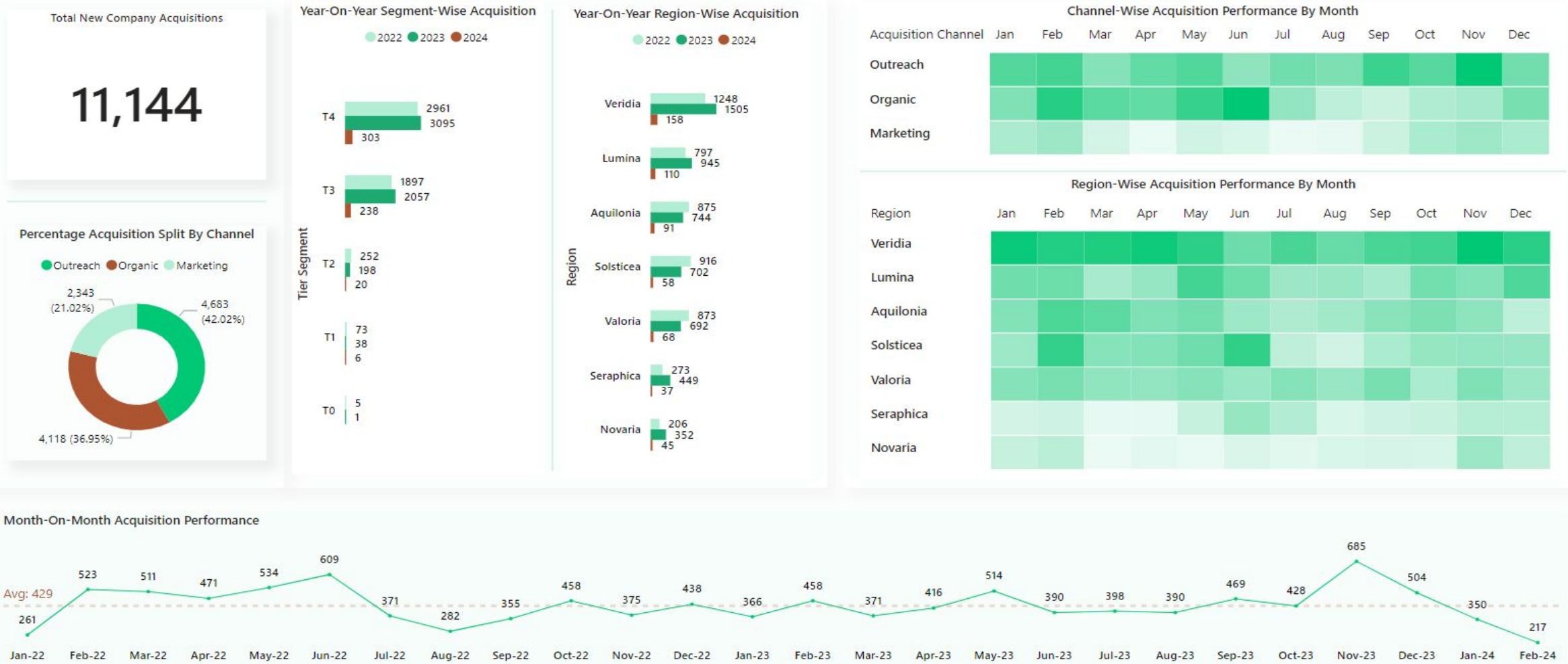

Figure 2

Figure 3

Figure 4

Findings From Acquisition Performance Overview

1. **Total Company Acquisitions:**
   - A robust **11,144** company acquisitions were recorded during this period.
   - Acquisition channels played distinct roles:
     - Outreach: Contributed **42%** of acquisitions.
     - Organic: Accounted for approximately **37%**.
     - Marketing: Comprised the remaining **21%**.

2. **Performance Tiers and Channel Acquisitions:**
   - Unlike the revenue overview, **T4** performance tier registered the most channel acquisitions, followed by T3, T2, and then T1. This shows no correlation between performance segments with new company acquisitions.

3. **Regional Insights:**
   - **Veridia**, unsurprisingly, leads in both revenue and new company acquisitions.
   - **Lumina** secured the second-highest number of new acquisitions.
   - **Aquilonia** completes the top three regions in terms of new company acquisitions.
   - Notably, Valeria, despite ranking **fifth** in acquisitions, generated an impressive **$2.07 million** in revenue—**second** only to **Veridia**.

4. **Monthly Performance by Acquisition Channel:**
   - **Outreach**: Exceptional performance throughout the year, except in **March**, **June**, and **August**.
   - **Organic**: Peaks in **June** and **February**.
   - **Marketing**: Influenced by available data from 2024, with standout months in February and January.

5. **Regional Heatmaps:**
   - **Veridia** consistently excels in acquiring new companies across all three channels.
   - Other regions show lower acquisition rates between **July** and **November**, except for **Veridia** and **Lumina**.

6. **Retention and Revenue Correlation:**
   - Finally, the month-on-month acquisition performs shows no positive trajectory which suggests there is no positive correlation between new company acquisitions and revenue generated. As a side note, this indicates is a high retention rate of companies who patronize Bolt's services after been acquired thereby reinforcing service quality and customer satisfaction.

Drill-Down Acquisition Findings

- The acquisition overview unequivocally highlights the Outreach channel as the leader in acquisitions. However, a more granular analysis of the Marketing channel reveals intriguing patterns. The patterns show that the optimal periods the business achieved prime success in acquiring new companies using the marketing channels was during the **1st** and **last quarters** as illustrated in figure 5. **Veridia** and **Lumina** also showed the highest acquisitions between November and **December**.
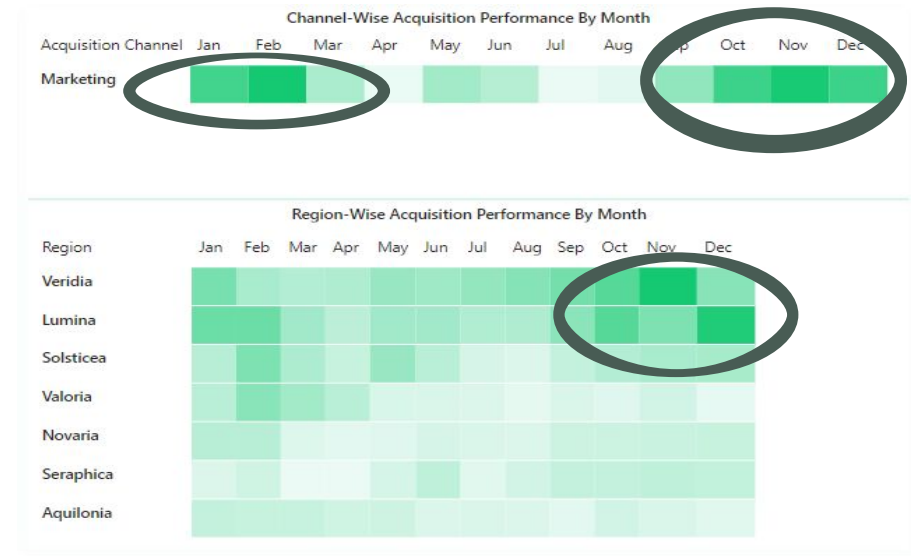
- The same granular analysis is applied to the Organic acquisition channel and the pattern inherent shows that the **1st half** of the year is the optimal period the business achieved her best success in acquiring new companies in all regions except **Seraphica**, **Valoria**, and **Novaria**. This is illustrated in figure 6.
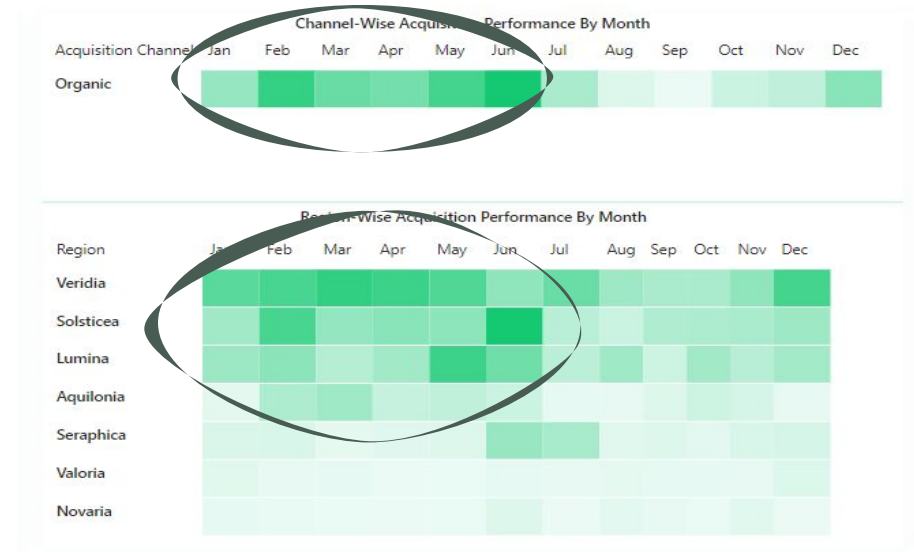

Figure 5

Figure 6

Recommendations

1. Quarterly Marketing Surge:

   Since the Marketing channel exhibits peak performance during Q1 and Q4, the business can allocate resources strategically to capitalize on seasonal trends by considering product launches, promotions, and brand visibility enhancements during these critical periods.

2. Regional Excellence:

   Since Veridia, Valoria, and Aquilonia drive the lion's share of the revenue, investing in localized marketing campaigns, customer retention programs, and community engagement would solidify the business's position in these key areas.

3. Organic Acquisition Revival:

   Valoria, Aquilonia, and Novaria: Despite their revenue contributions, these regions underperform in organic acquisition. Implement targeted SEO, content marketing, and referral programs to unlock their full potential.

4. Retention and Revenue Nexus:

   Since the month-on-month acquisition trend lacks a positive trajectory even though this shows high retention rate post-acquisition, the business should continue to focus on nurturing existing client relationships to sustain revenue streams.

Limitation

- A dataset that shows the budget allocation for departments such as marketing could assist provide insights into conversion rates, customer acquisition cost, and customer lifetime value which can aid further decision making on impact of acquisition strategies and how best to allocate for the coming financial year.

Thank you