SIMCO
DATA ANALYTICS
PROJECT

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AGENDA

1. Background

2. Project goals

3. Data Analytics Lifecycle

4. Power BI Demo

5. Insight & Recommendation

PROJECT BACKGROUND

The Simco Company has seen consistent decline in their sales, overdue amount percentage has increased & there is need to improve the customer experience to their clients.

SimCo's last 4 years of order-to-cash data is analyzed and dashboard is built to track & monitor team performance, generate insights and recommendations at the end.

THE COMPANY OVERVIEW

The SimCo Company Behind the Dataset

The Company, SimCo

- SimCo is a globally distributed multinational for which we have data for 4 years of operation (Jan '18 – Dec '21).
- The company is growing globally but there are variances to be found when examining performance through the lens of individual countries/ products etc.

Products

- The company offers 8 products. These do not have a set price so you can think of them as contracts for different service offerings where the contract price is unique to each transaction.
- The products are available in all countries, although you should expect differences in the maturity of products in each region.

Business Units
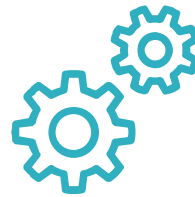
- There are 3 business units. Each product is assigned to one of the two business units
- Business units are presented as separate operations in the financial statements and are therefore very important for the C-suite.

Customers

- The company has a large customer base with varied levels of customer loyalty.
- The average spending patterns and days-to-pay varies by customer.
- Additionally, customers have different payment terms depending on the amount they spend with SimCo.

Locations

- The company operates across 33 countries with some countries in the early growth stage and others more mature
- The dataset also contains information on the region in which the companies operate – split into Africa, Americas, Asia, Europe and Oceania
- Each region has an assigned regional lead whose performance would be assessed on that region's performance.

THE DATASETS

Sales

HIGH LEVEL VIEW OF SALES PERFORMANCE

- Dataset grain: individual sales transaction
- Dimensions include customer_id, country, region, product_id, date and total sale

Receivables

DETAILED VIEW OF COLLECTIONS OPS

- Dataset grain: individual sales transaction
- Additional dimensions include payment terms, aging, payment date
- Also contains information on the number of payment requests sent out (dunning count) and whether the customer pays automatically (is AutoPay)

Receivables Month End

MONTH END SNAPSHOT OF RECEIVABLES

- Dataset grain: Outstanding receivable at month end for each unique combination of customer, product, country combination

Calls

DETAILED VIEW OF CUSTOMER SERVICE

- Dataset grain: individual call to a customer who has an outstanding payment due
- Additional dimensions include was Answered, call duration, call date, saleID (to link it back to a transaction)
- Calls are made to customers who are 30 days overdue and are attempted daily until the customer answers the call

PROJECT GOALS

Problem Statement & Business Task

Problem Statement

- Increase sales performance

- Reduce the overdue % for aging 60-90 days

- Optimize the customer experience rate

Business Task

- Analyze the sale affecting regions and determine high growth clients

- Build interactive dashboard to track & monitor overdue% and customer experience metrics

- Support stakeholder to make data-driven decision making to create sales campaign, understand agent performance and improve overall health of all 3 departments

DATA ANALYTICS LIFECYCLE
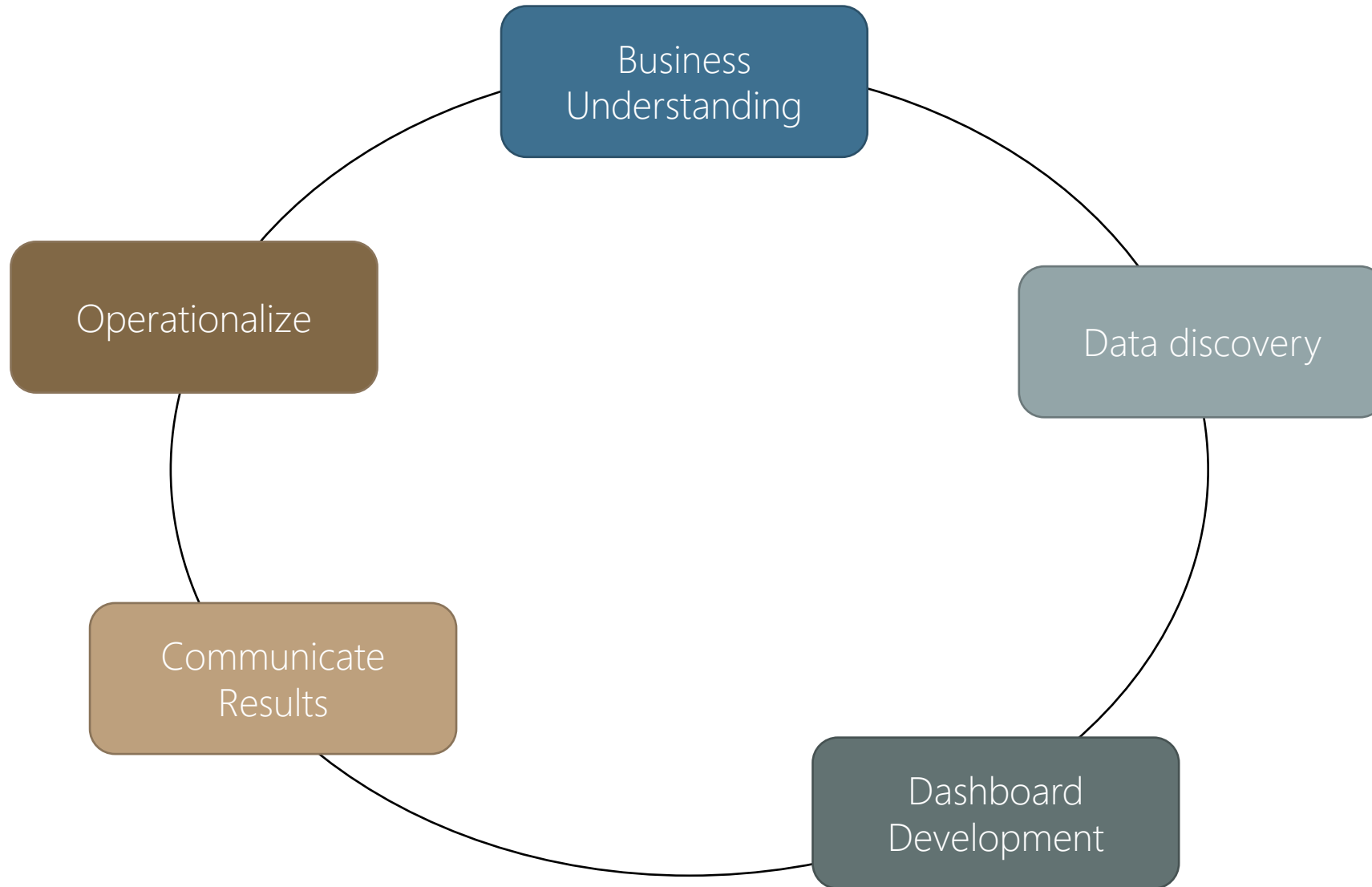
DASHBOARD WALK

Power BI

Key Benefits

Persona-Based Interactive Insights:-
Dynamic dashboard views carefully architected to deliver customized insights for SimCo's Executives & leadership team to enable insight to action.

Comprehensive Overview of Critical KPIs
Dashboard enables improved visibility into key business drivers while also providing a comprehensive snapshot of the most critical performance KPIs across SimCo's business.

Self-Service Analytics
Flexible analytics engine enabling users to slice and dice Patients and Revenue data. Users can easily and quickly perform their own data discovery

Key features of the dashboard – Key Influencers, Python sales forecasting, and Smart narrative feature

Intuitive User-Experience, designed for Executive & leadership Audience

RECOMMENDATIONS

- Regional leads for Africa & Spain to revisit the sales strategies, initiate conversations with customers to understand any area of concerns.

- Focus on high growth countries Romania and Turkey to increase the sales revenue

- Agents to contact overdue customers 3 days prior the payment date

THANK YOU !!!