

# CRM Sales Analysis – Project Summary

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## PROJECT OVERVIEW

This project aims to deliver business-ready insights for a CRM Sales database using advanced T-SQL and Tableau dashboards.

It focuses on analyzing sales performance, account behavior, and product trends by building powerful analytical views and visualizations.

The final deliverables include clean, efficient SQL logic and interactive Tableau dashboards.

## PROBLEM DEFINITION

The business wants to improve decision-making by analyzing the performance of sales agents, accounts, and products.

Currently, raw transactional data is spread across different tables with no consolidated reporting system.

The goal is to create a unified analytical layer through SQL views that feed into dynamic Tableau dashboards, answering specific questions about sales productivity, customer engagement, and product revenue segmentation.

## PROBLEM STATEMENT

"CRMsales" management seeks to build a centralized analytics solution that answers key performance questions for both the Sales Team and the Accounts (Customers).

The project should generate views that combine multiple sources like sales\_pipeline, accounts, products, and sales\_teams to track:

- Agent performance and contribution to revenue.
- Account lifetime value and segment behavior.
- Product sales trends and tier classification.
- Opportunity lifecycle metrics and pipeline health.

These outputs will be used in Tableau dashboards to help management make data-driven decisions about people, deals, and products.