SDR Calls & Meetings Analysis

Initial observations:

- On average, 10% of total calls are complete each quarter.
- On a daily basis, 20 calls are complete on average while the average number of daily incomplete calls is 176 for the entire team.
- Jonelle had the most total calls
- Q1-2017 showed complete calls dipped below the average - why? More emails?
- There's a slight correlation between the number of completed calls and the number of incomplete calls - as the number of complete calls increase so does the number of incomplete calls

Section 1) SDR Calls

Notes:

- *Not all data for Q4-2016 is included (only Sept)*
- *Phil and Dan were removed started in January (Q2-2017) so their call volume and meetings will be lower (ATARS now)*

The volume of SDR calls shows that these have increased from Q4-2016, but the completed rate has dropped from 12% to 8%:

Call	Total	% of Total
Incomplete	22097	90%
Complete	2356	10%

Fiscal QT	Outcome	Call	% of QT Calls
2016Q4*	Incomplete	4560	88%
	Complete	623	12%
2017Q1	Incomplete	11799	92%
	Complete	1002	8%
2017Q2	Incomplete	5738	89%
	Complete	731	11%

Note: Not all data for Q4-2016 is included (only Sept)

Who's calling the most?
Jonelle and Ben make the most calls

SDR	Total Calls	% of Total
Jonelle Miller	3404	14%
Ben Brendle	3381	14%

Diane Vu	2429	10%
David Iparraguirre	2073	8%
Dan O'Brien	1828	7%

How do the number of complete and incomplete calls look on a daily basis?

On average there are 20 complete calls a day and over 150 incomplete calls.
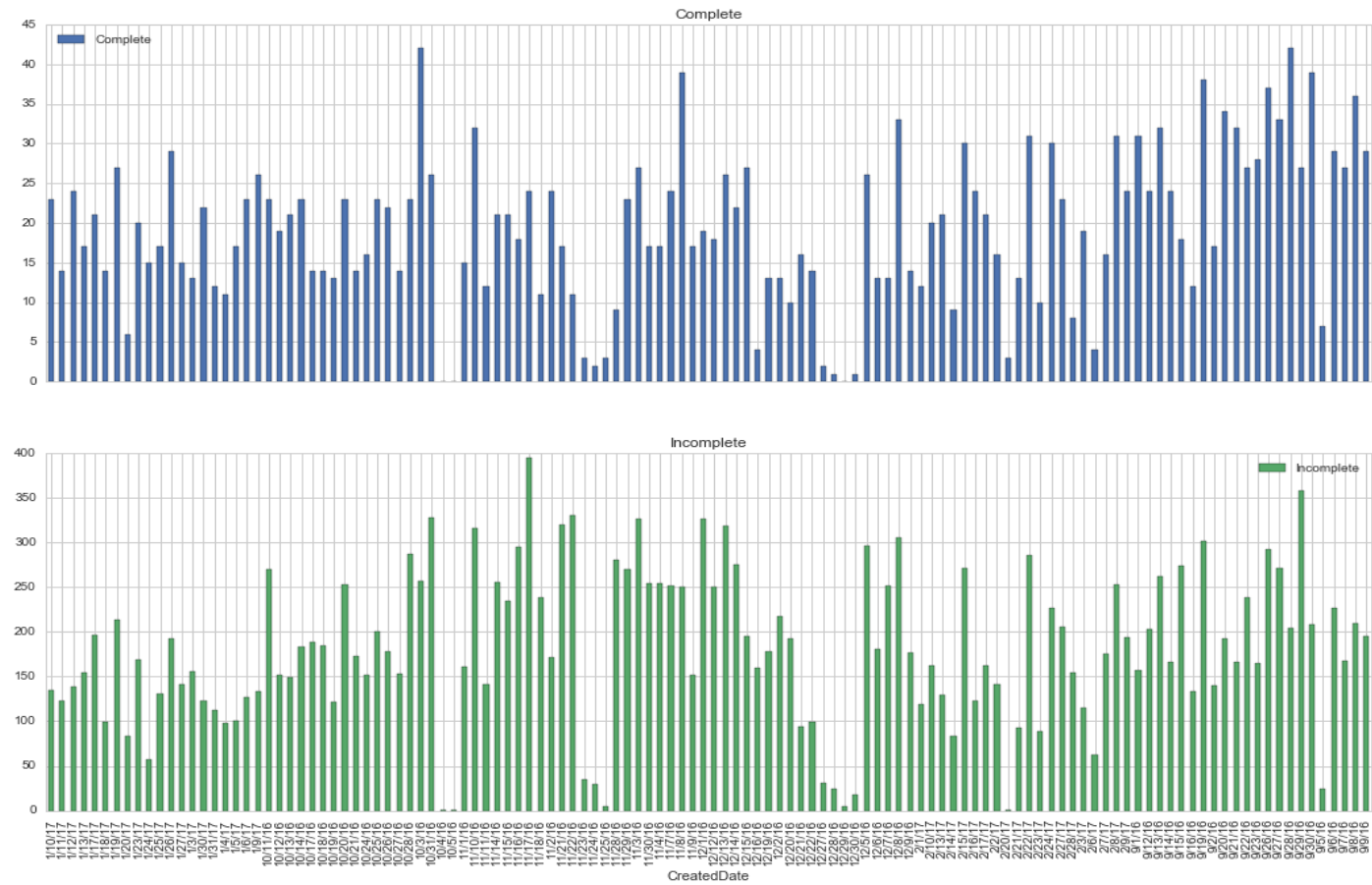

Who has the most completed calls?

Trevor Gori had the most completed calls then Tony followed by Matt.
David Iparraguirre and Dan had the most incomplete calls:

SDR	Outcome	Calls	Percent of Calls

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Ben Brendle	Incomplete	3044	90%
Ben Brendle	Complete	337	10%
Dan O'Brien	Incomplete	1774	97%
Dan O'Brien	Complete	54	3%
David Iparraguirre	Incomplete	2031	98%
David Iparraguirre	Complete	42	2%
Diane Vu	Incomplete	2242	92%
Diane Vu	Complete	187	8%
Jonelle Miller	Incomplete	3061	90%
Jonelle Miller	Complete	343	10%
Matt Tager	Incomplete	3636	89%
Matt Tager	Complete	469	11%
Phil Arbeiter	Incomplete	2020	95%
Phil Arbeiter	Complete	96	5%
Tony Fitzgerald	Incomplete	1788	86%
Tony Fitzgerald	Complete	296	14%
Trevor Gori	Incomplete	2501	82%
Trevor Gori	Complete	532	18%

Is there a trend by SDR?

The number of calls is increasing each quarter for all of the SDRs, and Matt and Ben are making the most calls
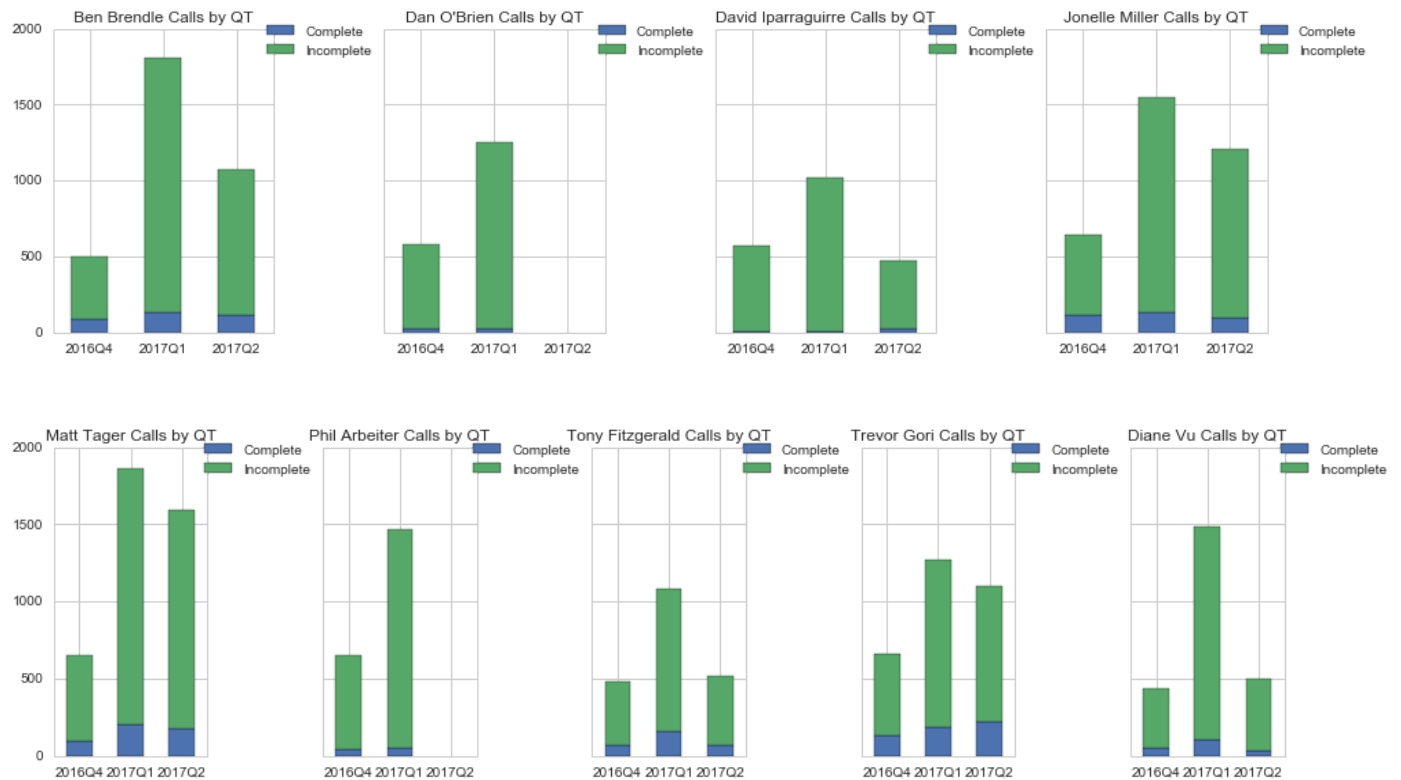
*Is there a correlation between the number of calls complete and incomplete?*

There is a correlation of 0.6 between the number of complete calls and the number of incomplete calls.
This shows that as the number of complete calls increases so does the number of incomplete calls:
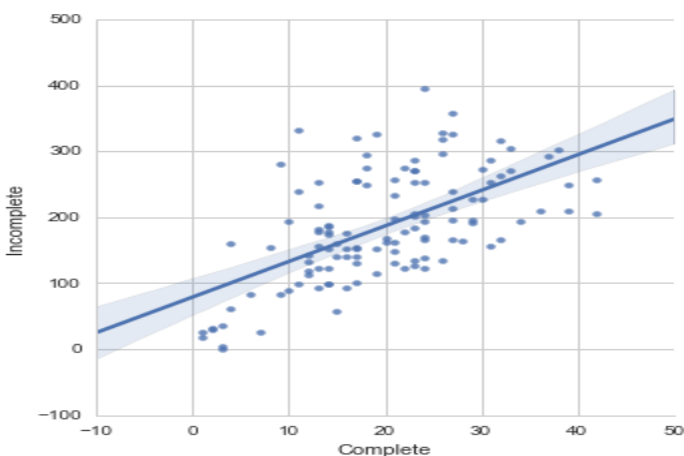
What if the data is grouped by quarter - is there a correlation between the number of complete and incomplete calls?

It looks like complete calls are increasing as incomplete calls increase in Q2-2017, while Q1-2017 didn't seem to follow the same pattern (because the points are not very well aligned with the straight line).
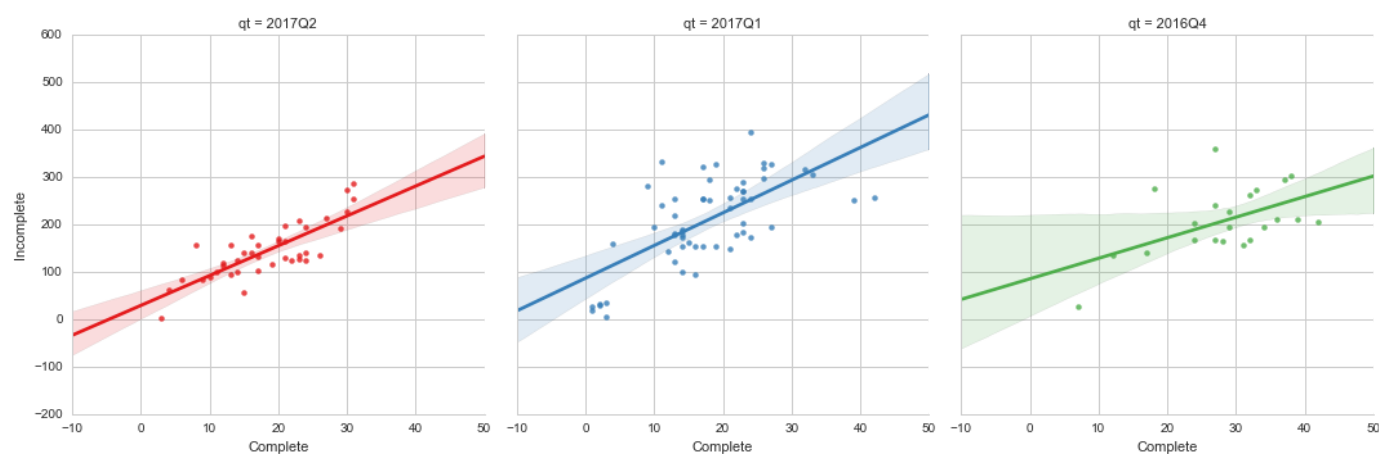
Do all SDR complete more calls as the number of incomplete calls rises?
Most SDR's complete more calls as they also increase the number of incomplete calls, but this is not the case for all. In particular, David completes more calls when he has fewer incomplete calls (negative correlation):

SDR	Outcome	Correlation between complete & incomplete calls
Dan O'Brien	Incomplete	1.00
Phil Arbeiter	Incomplete	1.00
Matt Tager	Incomplete	1.00
Tony Fitzgerald	Incomplete	1.00
Ben Brendle	Incomplete	0.96
Diane Vu	Incomplete	0.93
Trevor Gori	Incomplete	0.72
Jonelle Miller	Incomplete	0.30
David Iparraguirre	Incomplete	(0.84)

Section 2) Meetings

Note: Q2-2017 has 208 meetings with no Status set

When looking at meetings set, the majority of meetings are complete:

Meeting Status	Total
Completed	287
Deferred	23
Not Started	8
In Progress	1

Which SDR's are setting the most meetings?

Matt accounts for more than 20% of meetings:

SDR	Total Meetings - including Q2	Meetings excluding Q2	% of Total - including Q2
Matt Tager	117	60	22%
Trevor Gori	96	51	18%
Jonelle Miller	72	37	14%
Tony Fitzgerald	70	49	13%
Ben Brendle	46	26	9%
David Iparraguirre	34	16	6%
Diane Vu	34	22	6%
Phil Arbeiter	31	31	6%
Dan O'Brien	27	27	5%
Total	**527**	**319**	**100%**

How are these split up by meeting status?

Most SDR's complete over 90% of meetings, and Deferred meetings are below 10% except for Trevor and Tony

SDR	Meeting Status	Total	Percent
Ben Brendle	Completed	25	96%
	Deferred	1	4%
Dan O'Brien	Completed	25	93%
	Deferred	2	7%
David Iparraguirre	Completed	16	100%
Diane Vu	Completed	20	91%
	Deferred	2	9%
Jonelle Miller	Completed	36	97%
	Deferred	1	3%
Matt Tager	Completed	55	92%
	Deferred	5	8%
Phil Arbeiter	Completed	30	97%
	Deferred	1	3%
Tony Fitzgerald	Completed	36	73%
	Not Started	7	14%
	Deferred	5	10%
	In Progress	1	2%
Trevor Gori	Completed	44	86%
	Deferred	6	12%

	Not Started	1	2%

Have meetings increased last quarter?

On a quarterly basis, there were more meetings completed in 2016-Q4 than in 2017-Q2 where there were also more deferred:

Fiscal Quarter	Status	Meetings	Percent of Qt Meetings
2016Q4	Completed	81	98%
	Deferred	1	1%
	Not Started	1	1%
2017Q1	Completed	206	87%
	Deferred	22	9%
	Not Started	7	3%
	In Progress	1	0%

How many of these meetings are set to Sales Qualified?

Next Steps	Total	% of Total
Sales Qualified	343	76%
No Project in the next 6 Months	87	19%
No Opportunity	19	4%