

CB Hardware Sales Data By Close Value

Company Overview:

CB Hardware is based in the U.S. and provides a variety of hardware solutions to businesses such as **computing power, data storage, networking, and specialized industry requirements.**



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Scope of Presentation:

CB Hardware feels that the most important metric in the company is the “Close Value.”

In the context of sales, “close value” refers to the final value of a sale when a deal is successfully closed.

This can include:

- 1. The total revenue generated from the sale**
- 2. Encompassing all products or services sold,**
- 3. Discounts applied, and additional fees or charges.**

The close value is critical for measuring sales performance, revenue forecasting, and understanding the effectiveness of sales strategies.



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Key Aspects of Close Value

- 1. Total Revenue:** The gross amount of money received from the sale of products or services before any deductions.
- 2. Net Revenue:** The amount of money received after deducting returns, allowances, and discounts.
- 3. Sales Price:** The final agreed-upon price that the customer pays, which might include discounts or negotiated terms.
- 4. Quantity Sold:** The number of units or volume of services included in the closed deal.
- 5. Add-ons and Upsells:** Additional products or services sold along with the primary offering, which increase the total close value.
- 6. Recurring Revenue:** In the case of subscription-based services, the close value might include the initial payment as well as the expected recurring revenue over a specified period.



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Importance Of Close Value

"Understanding and maximizing the close value is crucial for the overall success and profitability of a business, making it a key metric in sales operations."

- **Performance Measurement:** Sales teams and individuals are often evaluated based on the total close value they achieve within a certain period.
- **Revenue Forecasting:** Accurate close values help businesses predict future revenues and plan accordingly.
- **Sales Strategy Evaluation:** Analyzing close values can provide insights into the effectiveness of pricing strategies, discount policies, and sales techniques.
- **Commission Calculations:** Sales commissions are frequently based on the close value, incentivizing sales representatives to maximize the value of each deal.

Example

If a salesperson closes a deal where they sell 10 units of a product at \$1,000 each, and the customer receives a 10% discount, the close value would be calculated as follows:

- **Gross Revenue:** $10 \text{ units} * \$1,000/\text{unit} = \$10,000$
- **Discount:** $10\% \text{ of } \$10,000 = \$1,000$
- **Close Value:** $\$10,000 - \$1,000 = \$9,000$

In this example, the close value is \$9,000, which is the amount the salesperson successfully brought in from that particular sale.



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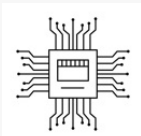
The Dashboard will answer the following Business Questions:

1. Who's the highest performing sales agent in each store?
2. Who's the least performing sales agent in each store?
3. Who's the managers of the least/highest performing agents?
4. Which store has the highest performance?
5. Which store has the lowest performance?

This information is vital to CB Hardware to learn

1. What type of training programs CB Hardware needs to put together
2. Model the most successful agents and management in the company to raise the performance of the low performance sales people.





CB Hardware Regional Sales Report By Close Value

May 2024

Total Regional Sales By Close Value
10,005,534
May 2024

Central
2,251,930
Top Selling Office
May 2024

Highest Close Value Salesperson
Darcel Schlecht
1,153,214
Annual Sales

Lowest Close Value Salesperson
Violet Mclelland
123,431
Annual Sales

Top 5 Regional Sellers

Darcel Schlecht Central	Vicki Laflamme West	Donn Cantrell East
	Cassey Cress East	Kary Hendrixson West

Darcel Schlecht is the best regional sales person in the whole company, closing over \$380,000+ worth of sales in Close Value. She has impressively topped two of the best sellers from both the West and East region stores.

Darcel is a primary candidate for sales observation. CB Hardware wants to study her methods and how she's able to execute her sales process.

Bottom 5 Regional Sellers

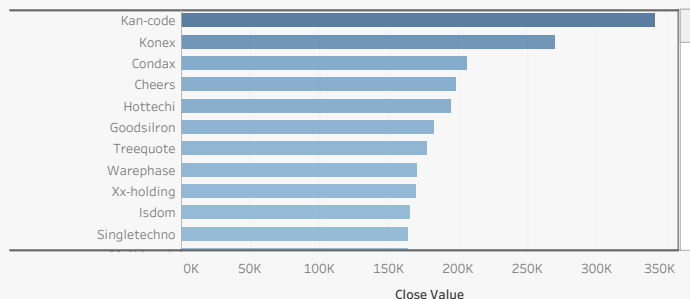
Lajuana Vencill Central	Versie Hillebrand Central	Niesha Huffines Central	Wilburn Farren East
			Violet Mclelland East

Violet Mclelland has the worst Close Value numbers by Region and is dead last in the whole company at \$98,247. These are the worst numbers that she has put up in the 5 years she's been with the company. However, her average Close Value number is riding at \$118,839 which means she's been stuck at the bottom half in the sales rankings.

CB Hardware plans to build a training model that will be able to model after what Darcel and other top sellers have been able to accomplish and help Violet Mclelland as well as low performing sales reps raise their numbers to higher levels.

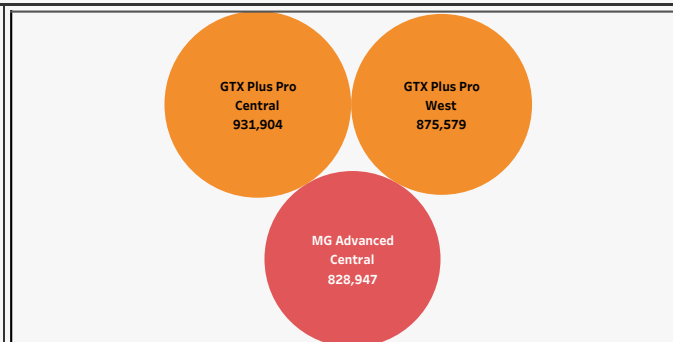
Sales Accounts

By Agent All



This is a list of B2B customers that CB Hardware has completed sales with in the month of May 2024. The drop menu shows a list of agents and the amount of customers they have done business with. These sales numbers are based on Close Value metrics.

Top Performing Products



These two products are the most sold packages in the company. These represent mid tier products.

Top Performing Regional Managers



These three are the top performing sales team managers in the company. These will be the three CB Hardware will model their updated trainings around based on the data that they've gathered from their sales activities during the month of May.