Power BI Departmental Demos

Sales

Target audience: Microsoft Sellers (TSPs, SSPs)

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# About this demo

## Goals

The goal of this demonstration is to showcase the Power BI capabilities in the context of common departmental business scenarios. Different departments in an organization have different needs for the type of data, reports and visualizations that they use to monitor their business and discover insights. The following four scenarios demonstrate how a Sales department could utilize Power BI:

• Pipeline Report

• Sales Performance

• Quota

• Trends

## Prerequisites

A Power BI account; a trial account can be obtained by following a few steps at http://powerbi.com.

## Overview and Context

This demonstration utilizes a fictional retail company named Wide World Importers.

# Demo flow and steps

## Power BI Sales Dashboard

|  |  |
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| Demo Step | Screenshot |
| 1. Click the Sales Dashboard 2. Dashboard is categorized into 4 sections  * Pipeline Report * Sales Performance * Quota * Trends |  |

## Part 1 – Pipeline Report

Power BI Benefits

Enable sales organizations to drive change in the management of pipeline, sales performance, quota management and sales trends and analysis of growth drivers and increase speed to insight. Sales analysts can now focus on impactful insights such as strategy, development and planning.

The Power BI Value Proposition:

* Reduce sales cycle times by measuring progress of your pipeline and opportunities
* Manage sales funnel of opportunities or velocity by stage of sales cycle
* Accelerate data insights with drill-down
* Better executive visibility and opportunity to drive rapid change

Objective: Examine pipeline status and opportunity value

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| Demo Step | Screen Shot |
| 1. Observe the **Actual vs. target revenue ($)** gauge and notice the Actual Revenue is 0.34bn which is just half of the Target Revenue. Let’s examine why. 2. Click on the gauge. This redirects to the **Pipeline Report.** |  |
| 1. This report has various clickable slicers on the left like **Region, Country and Product Category** to help further your analysis. 2. Examine the funnel chart - **Opportunity value by pipeline phase** to see a breakup of opportunity value by the various phases of the sales pipeline starting from 1- Discovery to 7-Negotiation. You can see that there is 16M locked in the 7-Negotiation phase and some action must be taken to expedite the closing process. |  |
| 1. Now, enable the drill icon  by clicking on it, and then click on the 7-Negotiation bar. This shows further details of the account owners working on this phase. This way, they can be contacted to understand the current status of their deals and the steps that need to be taken to expedite the closing process. 2. Use the up arrow on the left side to go back to the original funnel view. |  |
| 1. Next, take a look at the bar chart on the top - **Opportunity value by account type**. You will notice that the Platinum one’s have the maximum opportunity value of 155M. Click on the Platinum bar to see all charts change to highlight data only for Platinum accounts. 2. Observe the bar chart at the bottom – **Opportunity value by account** to see the Platinum accounts i.e. Southridge Video, Proseware Inc, Adventure Works etc. 3. Also observe the tree map – **Opportunity value by product category** and notice that the maximum opportunity for Platinum accounts lies in Décor and Lighting. 4. Click on the Platinum bar once again to remove the selection and go back to the original report view. 5. Return to the dashboard (click on the **Sales Dashboard** on the left navigation or Click on **Power BI** on the top left) |  |

## Part 2 – Sales Performance

Power BI enables several benefits such as:

1. **Know the numbers:** Monitor key metrics like win rates, number of wins, revenue to plan, margin and discounts
2. **Accelerate speed to insight:** Grow from “number crunching” to providing insight to support sales strategy
3. **Track results from every angle:** View actuals vs. plan across country, product line, channel, customer segment and more in a single view

The Power BI Value proposition:

* **Reduced time** spent comparing plan vs. actuals in separate tools
* **Increased visibility** and operational insight into sales actuals, variances, and forecasts
* **Improved strategic focus** and morale for sales specialists
* **Reduced effort** saving and emailing reports and ensuring a single version of the truth

Objective: examine sales performance

Let’s take look at how Power BI helps in analyzing sales performance.

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| Demo Step | Screenshot |
| 1. Click on either the **Actual Margin** card or the **Target Margin** card as shown in the figure on the right. This redirects to the **Sales Performance** report. |  |
| 1. Notice in the **Variance to target sales** bar chart that countries at the top in green like Spain and France are performing well, countries at the bottom of the chart in red like China and Germany are showing negative variance. |  |
| 1. Click on Germanyin the **Country** sliceron the left to see details of this country. Notice that all charts change to show data only for Germany**.** 2. In the cards above, the **Actual Margin** for Germany currently shows 11.33 % which is significantly lower than the **Target Margin** which is 15%. 3. Observe the **Planned vs. actual category mix** column chart and notice that Electronics, Dining & Entertainment and Lighting are the three product categories contributing to the sales of Germany. 4. Notice there is a significant difference between the actual vs. planned category mix for Electronics. 5. Investigate further into this by looking into the **Average discount by category** bar chart. Notice that the discount for Electronics is highest 4% when compared to other categories like Dining & Entertainment and Lighting. 6. Enable drill on this chart by clicking on down arrow  to get further into details. |  |
| 1. Click on the Electronics bar to see the account owner responsible for this category – in this case it is Peter Brehm. You can now speak to Peter to understand why his discount % is higher. 2. Return to the dashboard (click on the **Sales Dashboard** on the left navigation or Click on **Power BI** on the top left) |  |

## Part 3 – Quota

Power BI Benefits

1. **Blend your sales data:** View quotas, market size, opportunities, and demographics to discover more insights and make more informed decisions
2. **Find out how efficient your team is:** Manage variance to target by geography and sales representative
3. **Stay on top of change:** Use any device to react quickly to sudden changes in data such as countries not meeting quota
4. **Crush your quota:** Track key metrics like conversion rate, pipeline value, and win rate by getting a holistic picture of your customers

The Power BI Value proposition:

* **Accelerated time to insight** through reduced report development time
* **Improved management** of revenue by quota attainment
* **Greater insight** into key sales attainment metrics
* **Improved understanding** of team performers and underperformers

Objective: analyze the quota

Let’s take look at how Power BI helps in quota management and analysis

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| Demo Step | Screenshot |
| 1. Click on **Average sales ($) or the Average quota ($) card.** This redirects to the **Quota** report which gives insight into the quota attainment of the sales team. |  |
| 1. The cards on the top show the **Total account owners, Account owners on target, Account owners not on target, Average quota ($)** and **Average sales ($)** which help you get a better understanding of your team’s performance. 2. The column chart below shows the **Sales ($) and quota ($) by region**. In this case, it can be seen that all regions except North & Central America are performing below the quota. |  |
| 1. Click on the **Region** slicer on the left and select Europe. Notice all the graphs change to reflect data for Europe. Notice the bubble chart, **Countries not meeting quota** that shows the 3 different countries within Europe not meeting quota, Germany being the highest. 2. Click on the Germany bubble and notice the change in the bar chart on the right, **Variance to quota by account owner** change to show the account owner responsible for Germany – in this case Peter Brehm. 3. Return to the dashboard (click on the **Sales Dashboard** on the left navigation or Click on **Power BI** on the top left). |  |

## Part 4 – Trends

Power BI Benefits:

* **Improve visibility** to insights that inform decision-making.
* **Collaborate** easily using web-based sharing and group access.
* **Make your data actionable:** Analyze sales in real time to improve forecasting quality & move from hindsight to insight
* **Understand outliers:** Manage opportunities by trends and reveal outliers visually and drill-down to investigate root cause

Power BI Value Proposition

* **Enhance storytelling**, leveraging rich visualizations in presentations
* **Improve visibility** across the team to validate sales KPIs and trends and the underlying story
* **React faster** to customer trends and opportunities
* **Drive visibility** to opportunity data outliers that may expose hidden issues

Objective: Explore trends

Let’s take look at how Power BI helps in trends analysis.

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| Demo Step | Screenshot |
| 1. Click on the card, **Top accounts by YTD** **revenue FY15**. This redirects to the **Trends** report. |  |
| 1. Observe the cards on the top to see the Revenue this year vs. last year. 2. Next, observe the stacked chart, **Weeks to close**, to understand how long it takes for an opportunity to close i.e. won or lost. Also observe the line graph that shows the Percentage of opportunities by weeks to close. 3. Next, examine the chart Revenue by month (current year vs. last year) and notice that this year revenue is mostly lower than last year’s. 4. Next, observe the **Top accounts by YTD revenue FY15** bar chart to see the top accounts. Southridge Video and Tailspin Toys are the leading accounts. 5. The table on the right shows the **Account rankings for FY15** and notice that Southridge Video ranks 1 this year and also notice the YoY Change of 1 which means it has moved up by 1 whereas Proseware Inc. has gone down two positions and some investigation is needed there. 6. Return to the dashboard (click on the **Sales Dashboard** on the left navigation or Click on **Power BI** on the top left)   End of Demonstration |  |