2017 SALES ANALYSIS REPORT

Sales data for 2017

Customer Relationship Management Dataset

Presented by

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INTRODUCTION

This project focuses on extraction of valuable insights and trends from a **CRM** dataset, specifically targeting the various data-points related to Products, Sales, Salesperson, etc. By utilizing **SQL** queries, I have analyzed the dataset to uncover meaningful insights.

To enhance the comprehension of these findings, I have employed **Excel** to visually represent the insights obtained. Through this visual approach, we aim to convey the maximum amount of information in a clear and intuitive manner.

The purpose of this report is to provide a succinct summary of our project's methodology and the key discoveries derived from it.

By summarizing the approach and findings, I aim to effectively communicate the project's outcomes and contribute valuable knowledge to the field of customer relationship management and sales analysis.

DATA GATHERING

For the purpose of this project, I have selected a dataset that is readily available on data.world.
https://data.world/siyeh/sql-crm-example-data

The data consists of a simulated company's CRM data. The data covers the information of all the sales and the respective stakeholders involved for the year 2017. The data covers the monthly sales information starting from March 2017 and up till December 2017.
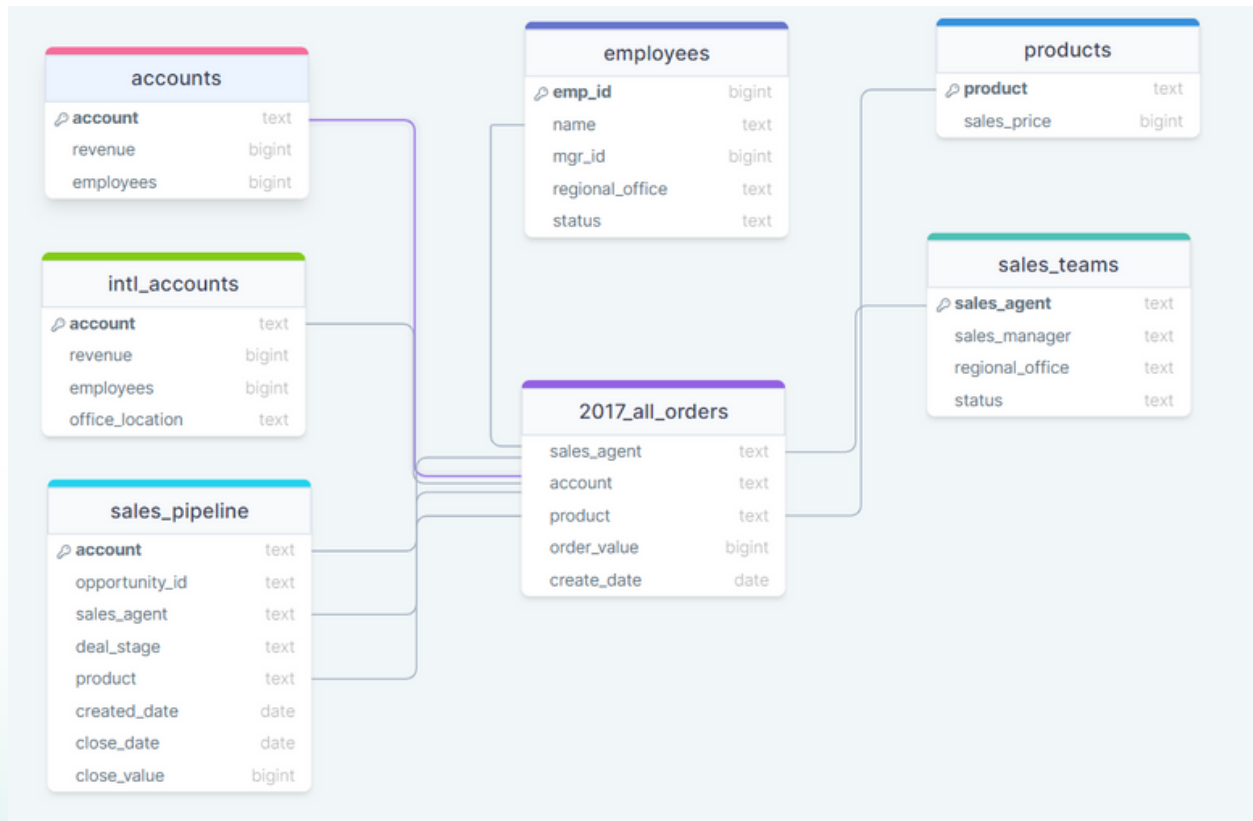
The tables as found on the website are as follows

accounts.csv	Data of all the customers that buy products
mar_2017_orders.csv to dec_2017_orders.csv	Data of the monthly sales from March to December
employees.csv	Data of the employees working in the company
intl_accounts.csv	Data of the international customers that the company serves
products.csv	Data consisting of the products that the company sells
sales_team.csv	Data consisting of the Salesperson

DATA GATHERING

The schema as found on the website
is follows.

Instead of creating different monthly tables as found on the website, a new column called 2017_all_orders is created to avoid redundancy of data

DATA GATHERING

The data is cleaned by following the given steps and approach. **Excel** is used for cleaning of the data.

1. **intl_accounts** and **accounts** tables are merged together as the former doesn't hold significant data to have a table of it's own.
2. **employees** table is dropped as the same information is contained in the **sales_teams** table
3. **monthly_sales** data of all the months are combined into a single file named **2017_all_orders**
4. As the **created_at** column in **2017_all_orders** has inconsistent data format, Text-to-Column feature is used to correct all the date formatting.

Finally, all the tables are loaded into **MySQL Workbench**

GOALS AND OBJECTIVES

The primary objective of conducting this analysis is to obtain a comprehensive understanding of the data at hand. By delving into the dataset and extracting insights, we aim to acquire valuable knowledge that can drive improvements in various processes.

One key area where these insights can be particularly impactful is in enhancing overall operations for the upcoming year. By thoroughly examining the data, we can identify patterns, trends, and areas of opportunity. For example, we may uncover specific product preferences, sales patterns, or customer behaviors that can inform decisions related to inventory management, production planning, or marketing strategies. This knowledge can help streamline processes, optimize resource allocation, and ultimately contribute to increased efficiency and effectiveness in the upcoming year.

Additionally, the insights derived from the analysis can also play a crucial role in strengthening connections with current customers. By understanding their preferences, needs, and buying behaviors, we can tailor our approach to better meet their expectations and build stronger relationships. This may involve customizing communication strategies, offering personalized recommendations, or developing loyalty programs based on the identified insights. By enhancing customer satisfaction and engagement, we can foster loyalty, encourage repeat business, and ultimately drive growth and profitability.

Overall, the analysis aims to provide a comprehensive understanding of the data, leading to actionable insights that can positively impact both internal processes and customer relationships. By leveraging these insights, we can make informed decisions, optimize operations, and foster long-term success in our business endeavors.

ANALYSIS AND VISUALIZATION

The Analysis and Visualization aspect is mainly restricted to the given points
1. **Salesperson**
2. **Products**
3. **Customers**

The product line consists of **9 different products** that are available at different prices according to their purposes and utility. The most affordable product is the **MG Mono** which is priced at **$17** and the costliest one that is **GTK 500** can go up to **$26768**. Given our diverse product range, our company also enjoys a diverse client base that buy the respective products according to their needs. We have served over **97 clients** with ambitious plans of expanding the same in near future. Our dedicated and robust Sales division is engrossed in co-operation with the clients to satisfy all of their needs. We have a team of **35 salesperson** which are overlooked by **6 managers** to ensure that the team is performing to it's maximum capacity.

Our revenue for the FY18 (up till December) is **$10,005,534 (~10 Million Dollars)** and we have sold over **4238 products.**
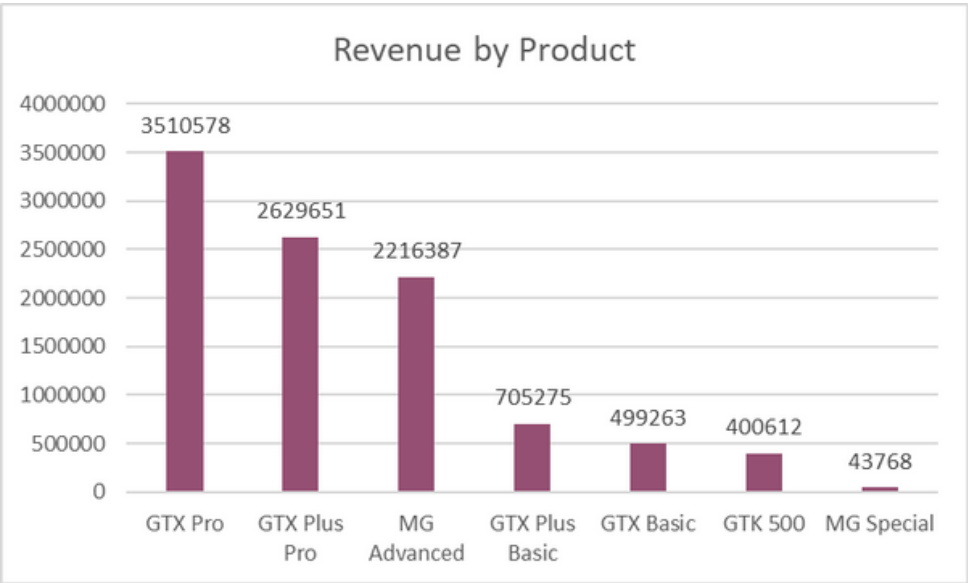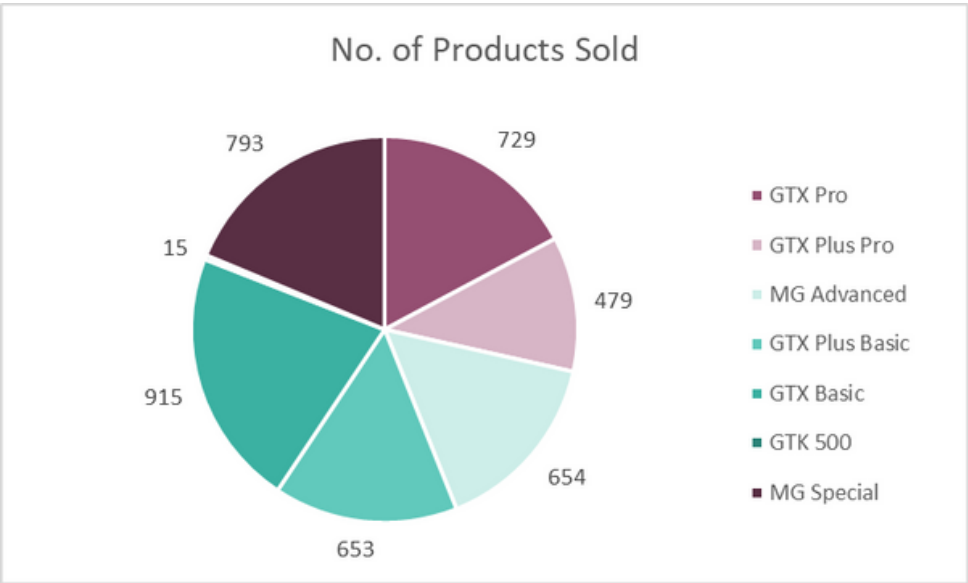
REVENUE

$10,005,534

PRODUCTS SOLD

4238

ANALYSIS AND VISUALIZATION

Out of the 9 products in our arsenal, we have sold **7 products** till date. **MG Mono** and **Alpha Caryad** have not been bought by any of our clients.

GTX PRO has gained us the most amount of revenue, standing at **65%** of all the revenue. Although garnering the least revenue, **MG Special** took the top spot in terms of sales. A detailed breakdown of the quantity and the revenue of each product is given below.

No. of Products Sold

793
729
15
479
915
654
653

- GTX Pro
- GTX Plus Pro
- MG Advanced
- GTX Plus Basic
- GTX Basic
- GTK 500
- MG Special

Revenue by Product

Product	Revenue
GTX Pro	3510578
GTX Plus Pro	2629651
MG Advanced	2216387
GTX Plus Basic	705275
GTX Basic	499263
GTK 500	400612
MG Special	43768

ANALYSIS AND VISUALIZATION

MG Special serves as an important entry point since it opens up the customer to other products. Although constituting the least revenue, it is the most important product as it introduces our company to the customer. To win the deal, our products are not necessarily sold at the Selling Price that we have formulated.

As it turns out, Salesperson have tweaked the prices of various products to win the deal with the client. Two of our products have been sold at a lesser price and have generated less revenue than expected.

GTX Plus Basic	**10413**
GTX Basic	**3987**
GTX Pro	**3931**
MG Advanced	**2635**
GTK 500	**908**
MG Special	**-153**
GTX Plus Pro	**-3773**

All in all, we have gained **$17948** more than our expected figures.
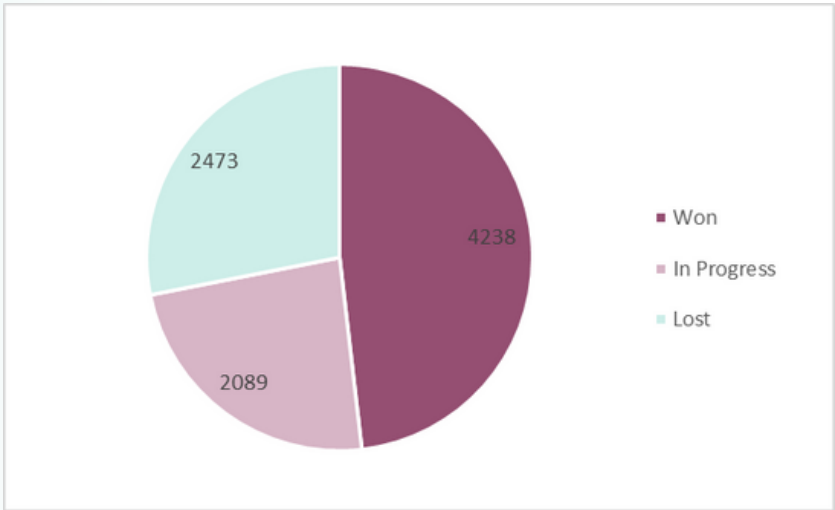
ANALYSIS AND VISUALIZATION

Moreover, we have **2089 deals** that are still progress. Depending on the outcome, we are expected to earn **$49,66,215** in the near future. This list is again topped by **GTX PRO** that is expected to earn us the most revenue in the near future. The products that are in the pipeline and the expected revenue are as follows
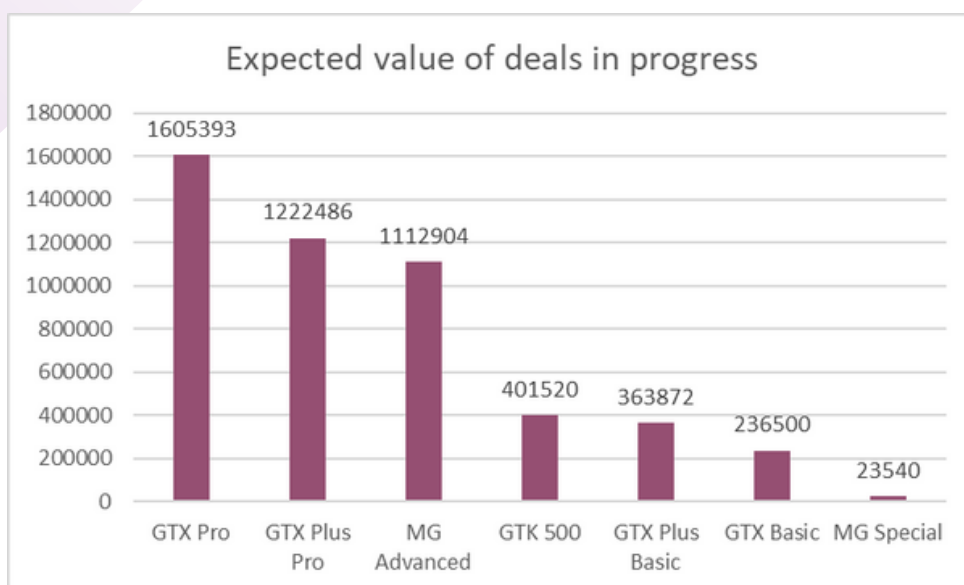

For this year, we have lost a total of **2473** deals that account a loss of over **$59,46,468** in expected revenue. **GTX Basic** has seen the most amount of cancellation. **GTX Pro** constitutes the most amount of revenue that has been lost. The detailed breakdown is as follows:

product	lost_count	lost_value
GTX Pro	418	2015178
MG Advanced	430	1458990
GTX Plus Pro	266	1458212
GTX Plus Basic	398	436208
GTX Basic	521	286550
GTK 500	10	267680
MG Special	430	23650

ANALYSIS AND VISUALIZATION

Majority of our orders are confirmed **within 2 weeks** from ordering. It is observed that the **2nd week** is crucial for follow up as most of the orders are confirmed in the **2nd week.**
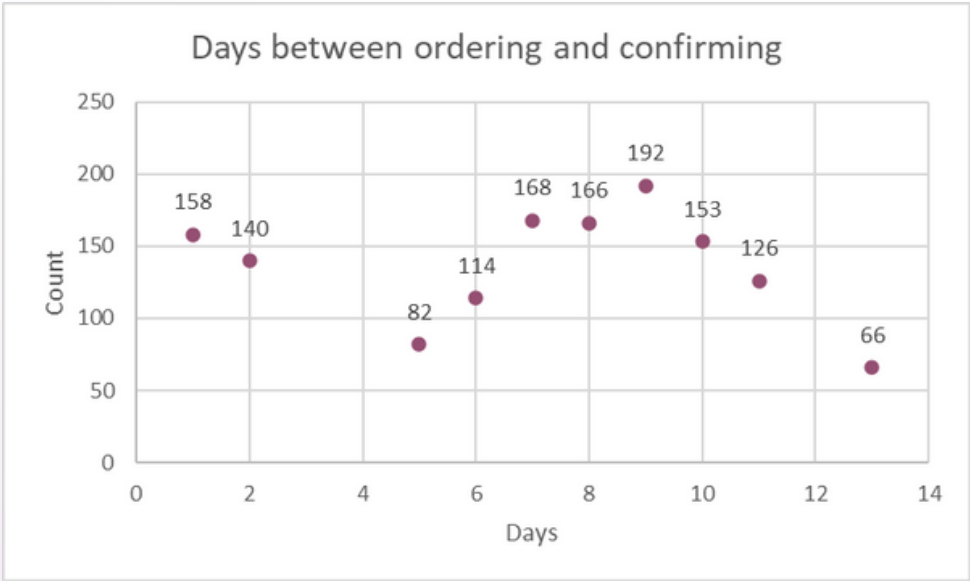
This year, we have served a total of **85 clients**. The specifics of top 10 clients by revenue and quantity are as follows:
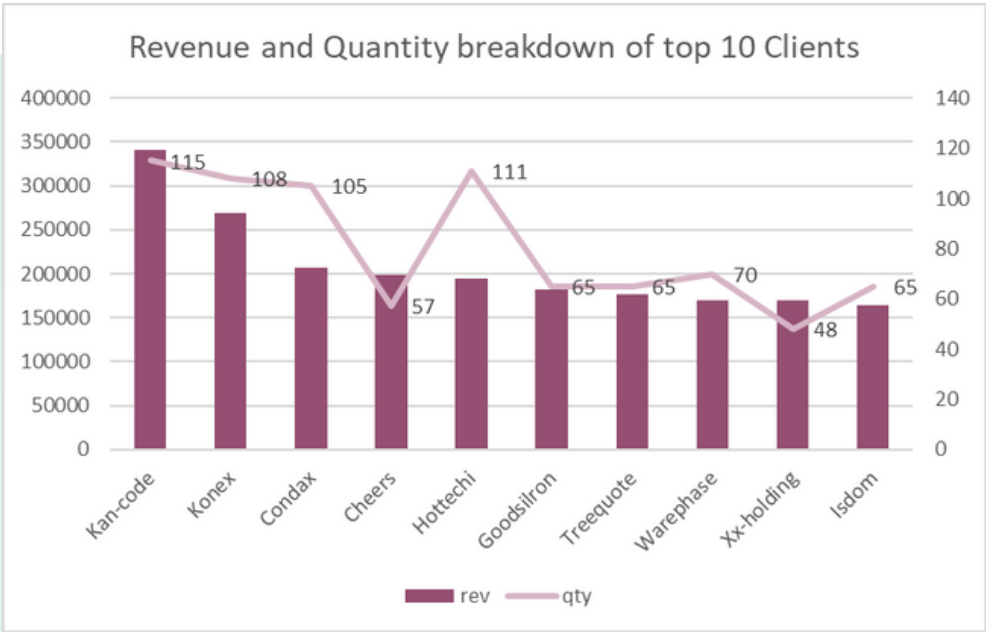
ANALYSIS AND VISUALIZATION

Kan-code has been our best client thus far as it has contributed the most to our revenue as well as the quantity. Our top 10 client make up for **20.7%** of our total revenue. A detailed breakdown of their product preferences are as follows.

Hottechi has cancelled the most amount of deals. These are the top 10 companies that have cancelled the most amount of deals.

account	lost_deals	lost_value
Hottechi	82	180595
Kan-code	72	199621
Konex	63	187122
Condax	54	125292
Dontechi	47	105232
Isdom	47	118777
Codehow	45	108044
Treequote	41	137291
Streethex	41	102023
Funholding	40	91698

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ANALYSIS AND VISUALIZATION

We have a dedicated team of **35 Salesperson** and **6 Managers** which operate out of different branches. Our top 10 Salesperson by the number of deals secured are:

| sales_agent	revenue
Darcel Schlecht	**1153214**
Vicki Laflamme	**478396**
Kary Hendrixson	**454298**
Cassey Cress	**450489**
Donn Cantrell	**445860**
Reed Clapper	**438336**
Zane Levy	**430068**
Corliss Cosme	**421036**
James Ascencio	**413533**
Daniell Hammack	**364229**

Darel Schlecht is our best Sales employee as he as the most amount of deals and also the most amount of revenue by a significant margin.

ANALYSIS AND VISUALIZATION

4 of the top 10 Salespersons are managed by **Rocco Neubert.**

manager	emp_count
Melvin Marxen	1
Cara Losch	1
Rocco Neubert	4
Celia Rouche	1
Summer Sewald	3

Employees under the management of **Melvin Marxen** have earned the most amount of revenue thus far.
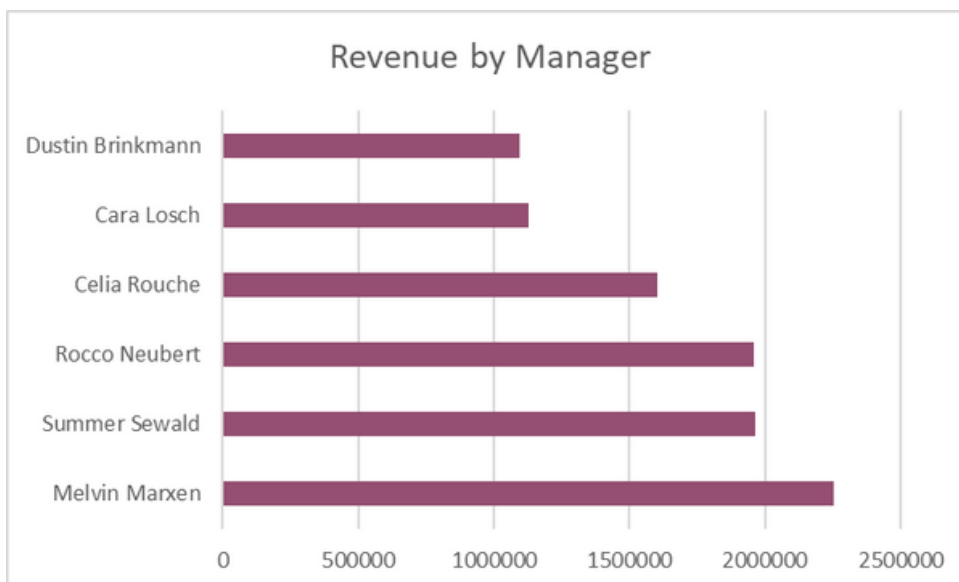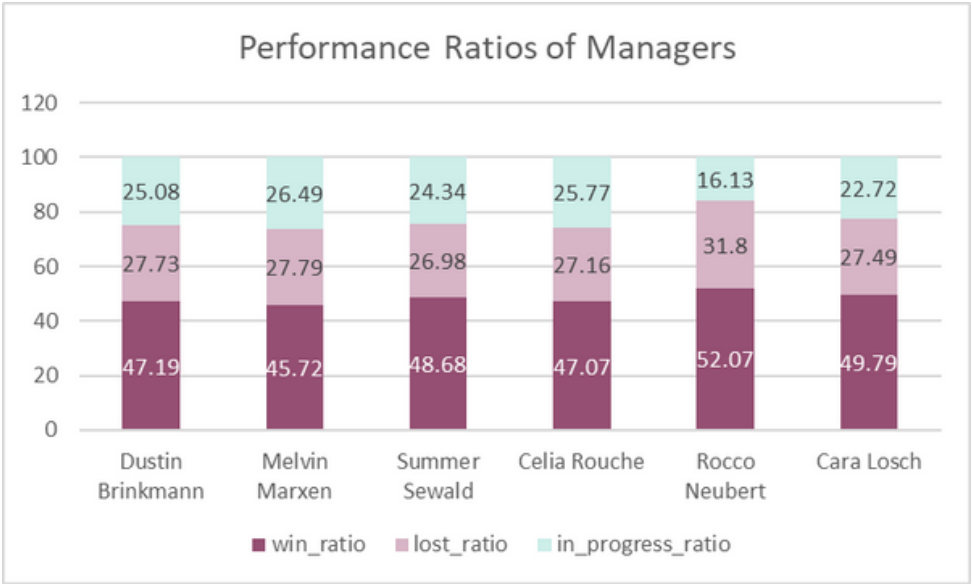
ANALYSIS AND VISUALIZATION

Each of our regional office contribute more or less equally to the overall revenue but the highest among which is the **West Office.**
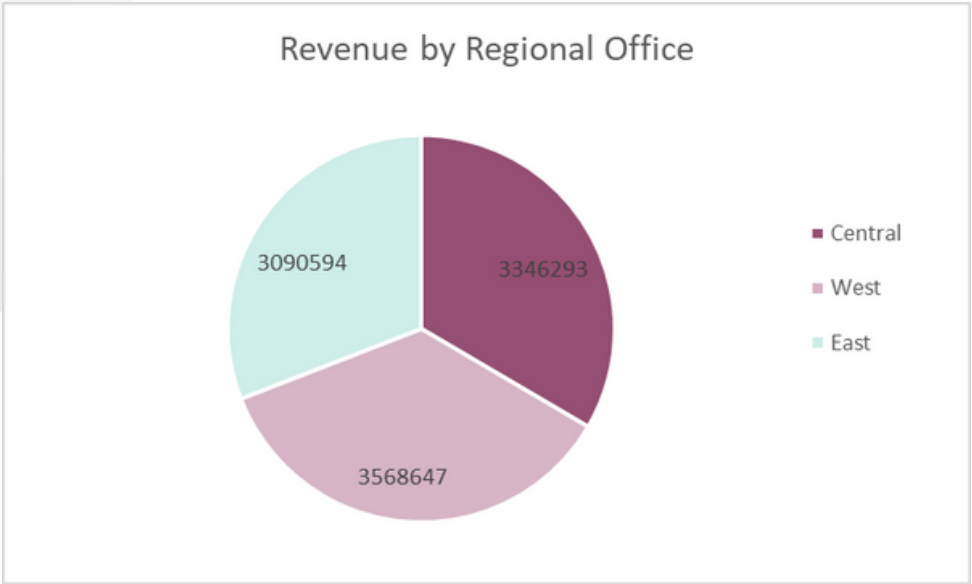
This year, **7** employees have left our company, 2 of whom worked under the management of **Rocco Neubert**.

Rocco Neubert is also the manager with the **best Win ratio** and the **worst Lost Ratio** but has the least amount of orders in progress

ACTION POINTS

Based upon the due analysis, I have devised the following action points that can be taken to ensure better processes and outcomes.

1. Lessen the price of **GTK 500** as it is significantly pricey than it's predecessor
2. As the **GTK 500** has only been bought 15 times this year, new introductory price in the consequent year can boost the sales.
3. More marketing effort can be done for **MG Special** as it has the most amount sales and serves as an entry point for our clients.
4. Although it is the cheapest, there are no sales of **MG Mono** and it's discontinuation can be considered. **Alpha Caryad** has no sales either.
5. Price of **GTK Pro** can be reduced further as it already garners the most revenue and has the customer base in place.
6. After **2 weeks** of initiation of deal, follow up must be taken to ensure a positive conversion of the deal.
7. Lost deals need to be investigated with more data as a significant amount of revenue has been lost as a result.
8. **Special offers** must be given to our legacy customer that contribute the most to our revenue.
9. The clients which cancel the orders should be **investigated** with more data to improve processes.
10. As the companies who have higher number of cancellation also contribute the most to our revenue. Special attention must be given to convert these orders as their relation is highly valued.
11. **Darcel Schlecht** must be rewarded and retained as he has contributed the most to our company in terms of sales.
12. **Rocco Neubert** has ensured a better performance of his team amongs't other managers.

THANK YOU