

Overview and Business goals

- **Context**: 6 weeks ago we launched a new line of office stationary.
- **Data**: Since we have data from the sales tracking system, the executive team wants to have an update on the sales approaches used for the new product line.
- 3 tested sales strategies:
 - **EMAIL**: email when the product is launched and another email 3 weeks later
 - **CALL**: call by a team member (around 30 min)
 - **EMAIL + CALL**: email when the product is launched and one call 1 week later (around 10 min)



- They want to know the following **insights**:
 - How many customers are there for each approach
 - How is the revenue spread overall and for each method
 - If there has been a difference in revenue over time
 - **Which method we should continue to use to sell the new products effectively**

Key findings



Customers by Sales Method



From the last 6 weeks record, the **Email approach accounts for the most customer interactions**. The second most utilized sales method is the Call, with the least used approach being the combination of the two (Email + Call).

Also, customers approached through Phone Calls are more than twice the customers approached with the combined method.

Therefore, there is a significant difference between the number of customers for each method.

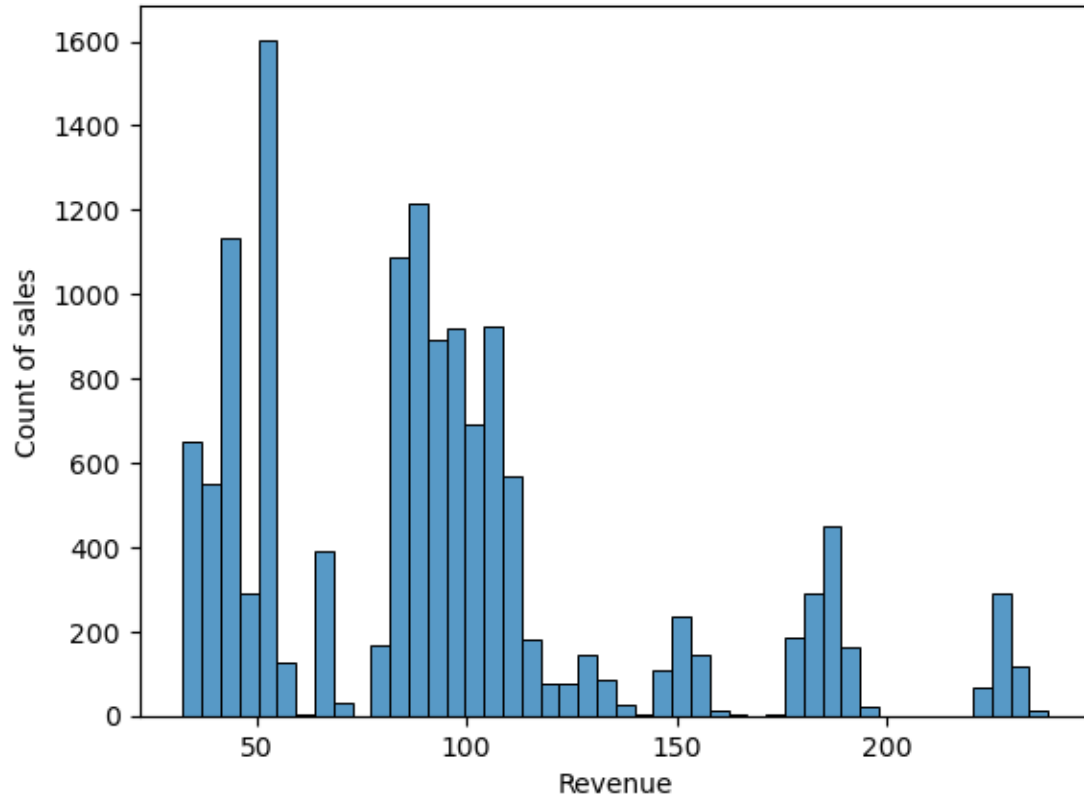
Key findings



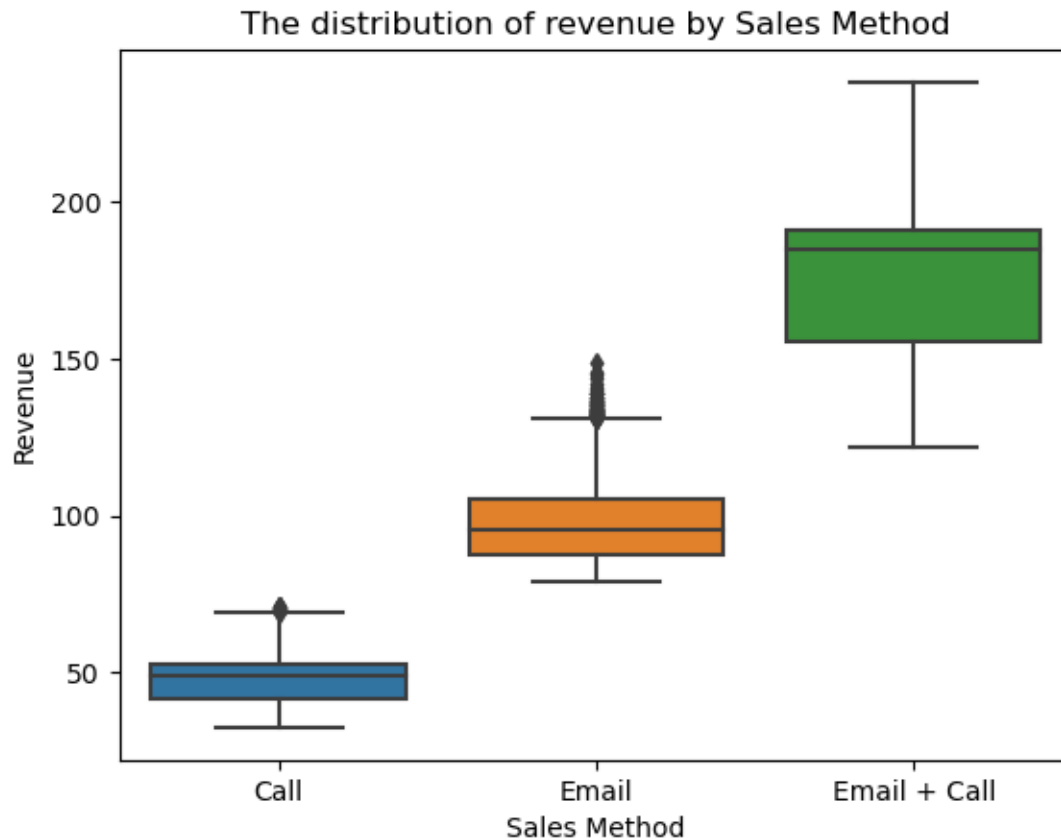
How is revenue spread overall

From the distribution of the revenue, most of the revenues fall under 150, reaching a maximum of 238.32.

The distribution of revenue



Key findings



How is revenue spread for each method

- Revenue

From the boxplot here, the revenue range from sales obtained using the Email + Call method is more significant than for the other two methods. Although it is the less used approach, it stands out as having both the highest revenue and the widest interquartile range.

This suggests that this approach is particularly effective in generating substantial sales, including all those sales exceeding 150 in revenue.

In contrast, the Call method, even though it is the most time-consuming approach, exerts the least influence on revenue.

Key findings



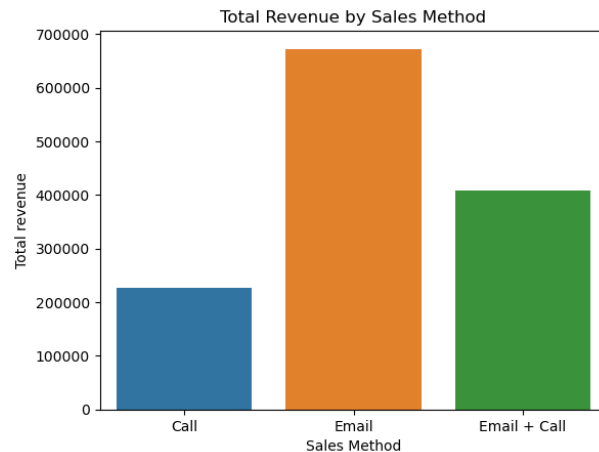
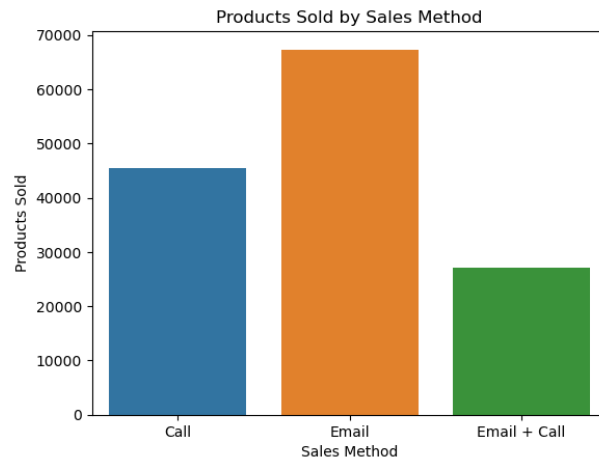
Which method we should continue to use?

– Products Sold and Revenue

From the bar chart here, we see that the Email method is the one that accounts for more products sold, followed by the Call method and the Email + Call approach.

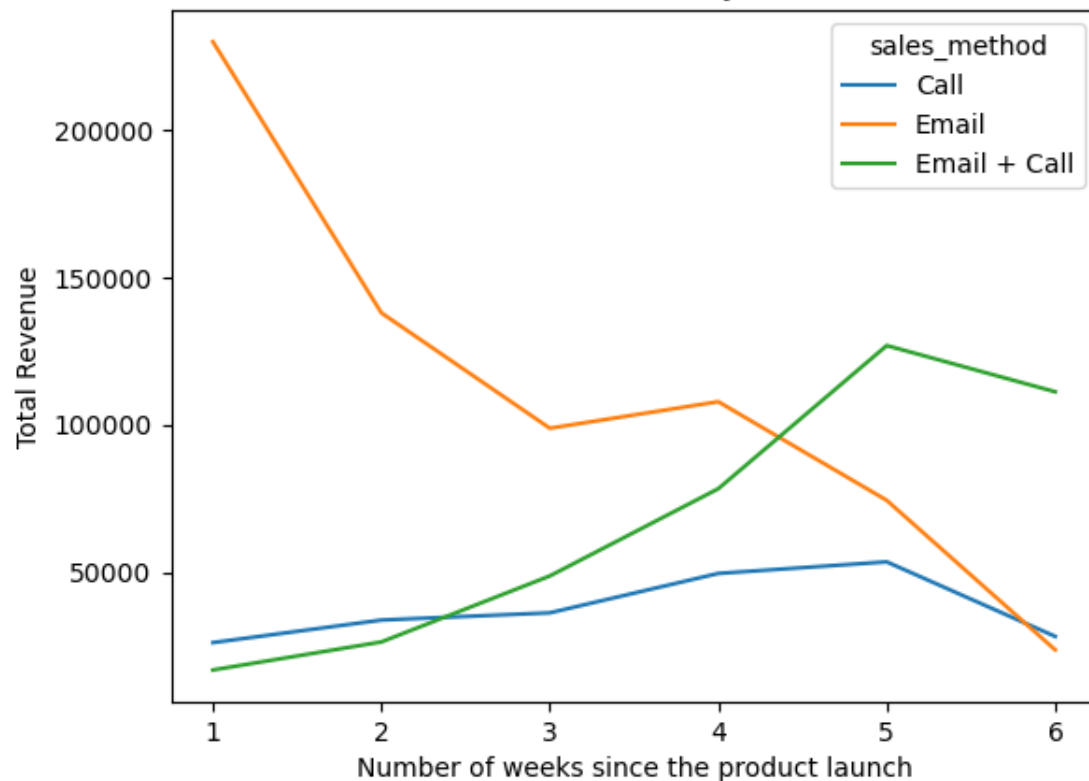
In contrast, if we focus on the total revenue, we see that the Email approach is also the one that has contributed the most, accounting for more than half of the total revenue, but more importantly that **the revenue generated by the Email + Call approach is almost twice the revenue generated by the Call method.**

This shows that the Email + Call method tends to generate sales of more expensive products than the other methods.



Key findings

Total Revenue over Time by Sales Method



Which method we should continue to use? –

Revenue over time

As we see in the line plot here, revenue generated by the Email method decreased over time, with a slight uptick after the reminder email was sent three weeks after the launch.

In contrast, revenue obtained from both the Call and Email + Call approaches increased over the first 5 weeks, with the combined approach being the most effective in boosting sales.

Therefore, **a combination of the Email and Email + Call methods would be the most effective way to increase sales and revenue consistently.**

Business metrics

- % of total revenue generated by each approach in the last 6 weeks
- % of customers in each sales method in the last 6 weeks



	Email	Call	Email + Call
% Total revenue	51,4%	17,4%	31,2%
% Customers	49,7%	34,3%	16,0%

change in % total revenue
vs.
change in % customers

Recommendations

- Use **metrics** to monitor the evolving effectiveness of our sales methods
- To enhance the **effectiveness** of sales techniques:
 - Optimize resource allocation
 - Improve our Email strategy by revamping and personalizing its content
 - Integrate the newest information in email and calls.



- **Data collection:**
 - New data: the number of customers approached by each method to apply a conversion rate.
 - New data: determine which are the products sold through each method to know for which ones the team should apply the combined method and for which ones the Email would be efficient enough. This is important considering the time spend by team members in the calls.