# Clipboard Case Study: Recommendation to Sales team

!! I designed a Power BI based potential customer identification tool that I would like to share with the sales team. It has built-in filters with 4 key metrics !!

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## Introduction

I started the case study by learning about Clipboard from open-source research and experimented with the app. I understood Clipboard aims to provide better solutions to the staffing problem in the healthcare system. Clipboard serves as a platform to **connect supply** (healthcare workers, like RN) to **demand** (healthcare providers).

So, I reached a conclusion that the main responsibility of the sales team at Clipboard is to promote this application to healthcare providers and ask them to post their contractor needs on the platform.

## Recommendation

I wanted to give one very simple recommendation: a short list of 5 potential customers.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Provider Name | Phone number | Number of Certified Beds | Bed Utilization Rate | Contract Percentage |
| NORTHAMPTON COUNTY-GRACEDALE | 6107461900 | 688 | 59% | 54% |
| PARKHOUSE REHABILITATION AND NURSING CENTER | 6109488800 | 467 | 62% | 34% |
| OHIO VETERANS HOME | 4196252454 | 427 | 42% | 31% |
| JOHN J KANE REGIONAL CENTER-MC | 4126758620 | 360 | 55% | 38% |
| JOHN J KANE REGIONAL CENTER-SC | 4124293020 | 311 | 61% | 47% |

## Analysis

THREE METRICS:

The **higher** the number of certified beds, the **larger** the provider, the **more money** Clipboard can charge.

The **lower** the bed utilization rate, either the local **demand is low** or the provider **need more supply of workers**, this is where Clipboard comes in.

The **higher** the contract percentage, the **more likely** the provider will be open to accept Clipboard.

Below are some visualization from the dataset during the initial exploration stage.

Pie Chart 1:How much of the work is done by contract workers?

A blue pie chart with a orange triangle

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Pie Chart 2:How providers differentiate in their reliance on contract workers?

A pie chart with numbers and a few different colored circles

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**Contract workers takes up about 7.5% of the market, and more than 75% of providers have contract-hour-percentage under 10%.**

I merged the provider detail dataset and generated two more metrics.

# SQL

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