Sales & Analytics Case

To get a picture of your general understanding of sales and analytics, we have prepared a task. Please process this within 3 days.

Delivery Analysis

An important part of the service business is not only closing deals, but also delivery planning and compliance. Each partner must also comply with the specified planned goals. Now we would like to look at the Shelby Company Ltd., do a half-year check where all partners are in order to adjust the planning for the rest of the year accordingly.
Here you can see the planned revenues for the first half of the year:

Partner	1_2021	2_2021	3_2021	4_2021	5_2021	6_2021	H1
Arthur	325.000€	325.000€	325.000€	325.000€	325.000€	325.000€	1.950.000€
Tommy	322.729€	322.729€	322.729€	322.729€	322.729€	322.729€	1.936.375€
Ada	304.708€	304.708€	304.708€	304.708€	304.708€	304.708€	1.828.250€
Michael	324.296€	324.296€	324.296€	324.296€	324.296€	324.296€	1.945.773€

Attached you will find an Excel sheet in which you will find the committed revenues of the last 6 months, i.e. the revenues actually achieved for all projects.

For a comprehensive analysis, leadership is interested in the following questions:
- Where is the Shelby Company Ltd. in comparison of Planned to Committed Revenue?
- Where does each individual partner stand compared to planned versus committed revenue?

e. Use the two data sources and choose appropriate visualizations of the data, with short comments to provide answers to the above questions. The focus here should be on the visualizations. What you do with the data and how you organize it is up to you.

f. Justify your choice of visualizations.

g. Make recommendations to leadership for revenue planning for the second half of the year. There isn't a single solution here, so be creative.

h. Now we want to go one level deeper and find reasons why the partners have performed well/poorly. What other types of data, information and sources would you look at to find causes/ indications for each partner's performance?