Vention Data Analysis Report

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Contents

Chapter 1

Visualization

The data was received in a *.csv* file, and it contains the following columns:

- *accountid* - customer account id

- *amount* - amount of bought products

- *closedate* - date in which the deal was closed

- *opportunityid* - the id of a possible sales lead

- *opportunity_creation_date__c* - date in which the first contact with a customer was made

- *ownerid* - seller id (the *owner* of the opportunity)

- *primary_application__c* - primary application of the product that is being sold

- *stagename* - in which stage the sale is categorized

- *sales_team__c* - to which sales team the opportunity, seller, and customer belongs

The description of the columns are based solely on the name of the columns itself. In an ideal environment I would get a more accurate definition of each one by asking the person that sent me the file a description of each column, and proceed with the analysis to avoid mistakes and misinterpretations.

1.1   Closed Won - Success sales by sales team

Under the column *stagename* it is possible to see 8 different values, they are:

- Closed Lost

- Closed Won

- Prospect

- Project Discovery

- Closing Stage

- Project Quoted

- Design Review

- Awaiting Purchase

To create a chart that shows which sales had a positive result it was considered the registers that have the value *Closed Won*.
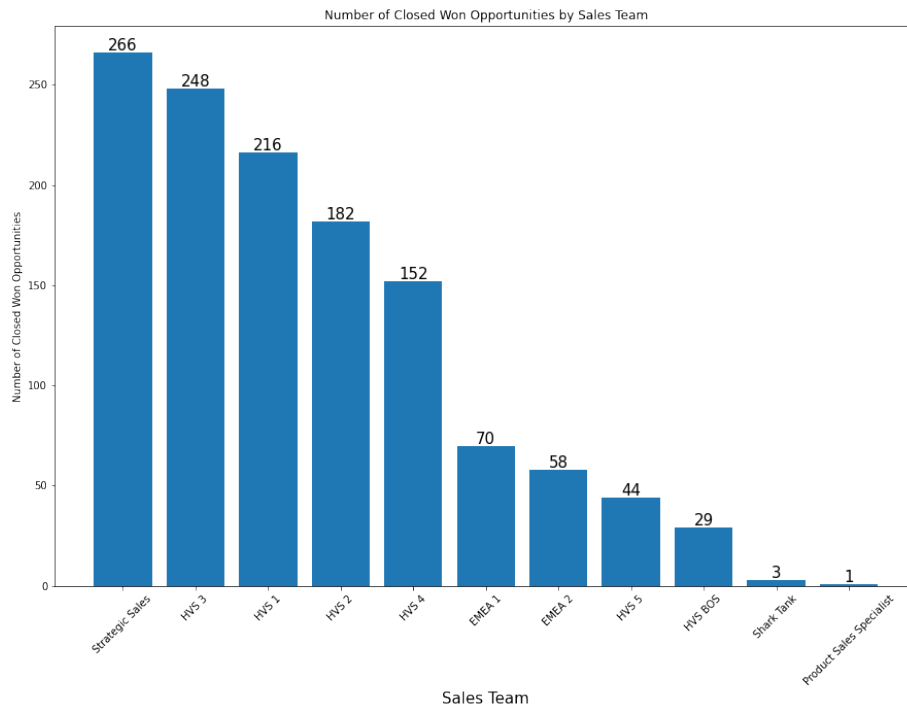

Figure 1: Closed Won versus Sales Team.

As we can see in figure 1 the team with most sales is the *Strategic Sales team*, with 266 closed sales won, followed by *HVS 3* and *HVS 1*, with 248 and 216 sales respectively. From now on the analysis will focus on them.

However, it is also important to see the success rate of each team. Even if a team wins many sales, it doesn't mean that it is the most successful because it may be losing many sales too.

To better evaluate this, it was created a *Sales Index*, which can be calculated using the following formula:

$$Sales\ Index = \frac{\#\ Closed\ Won}{\#\ Closed\ Won + \#\ Closed\ Lost} \tag{1.1}$$

Chapter 2

SQL query

Chapter 3

Technical details