



Sales dashboard

Original equipment manufacturer (OEM) for electric vehicles

Built a reporting suite to track Sales performance and help identify gaps in Sales Pipeline on a real-time basis.

Sales dashboard (B2C & B2B) for an equipment manufacturer

Situation

- Client lacked real-time visibility into Sales Team performance as they relied on Excel reports with long turnaround times and at a monthly cadence
- Partnered with the client to develop a comprehensive reporting suite to track Sales performance and help identify gaps in sales pipeline

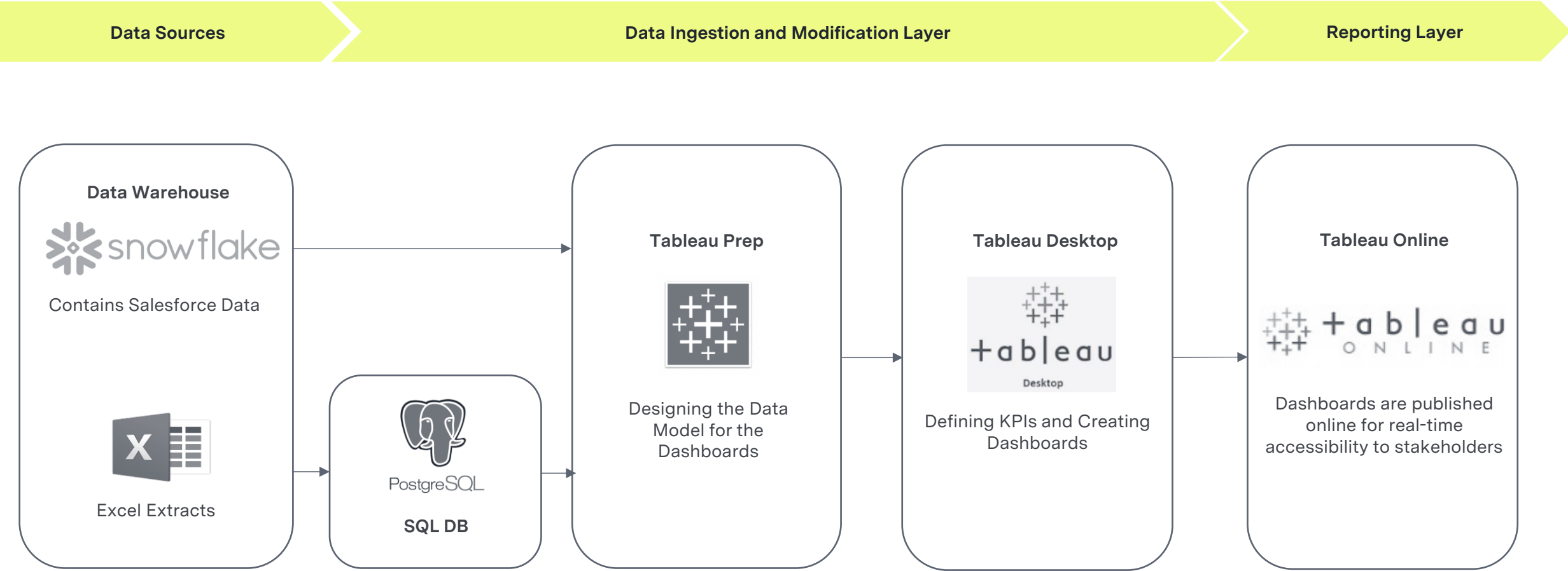
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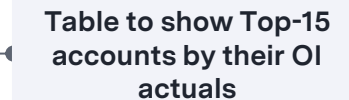
- Analyzed Salesforce data and collaborated with client's Data Engineering team to help set up data for the reporting suite on Snowflake data warehouse
- Defined KPIs and built self-service reporting suite on Tableau with dashboards that provide real-time visibility into:
 - Actual Order Intake (OI) vs. Budget
 - Order Intake Forecast for next 4 months
 - Status of high value opportunities in Sales Pipeline
 - Sales Team Productivity
- Identified that ~80% of the order intake is entered in Salesforce just 1 week ahead of opportunity closing and suggested the best practices
- Identified customers that were offered higher/lower discount compared to the existing guidelines and helped the team design a new discounting framework

Impact

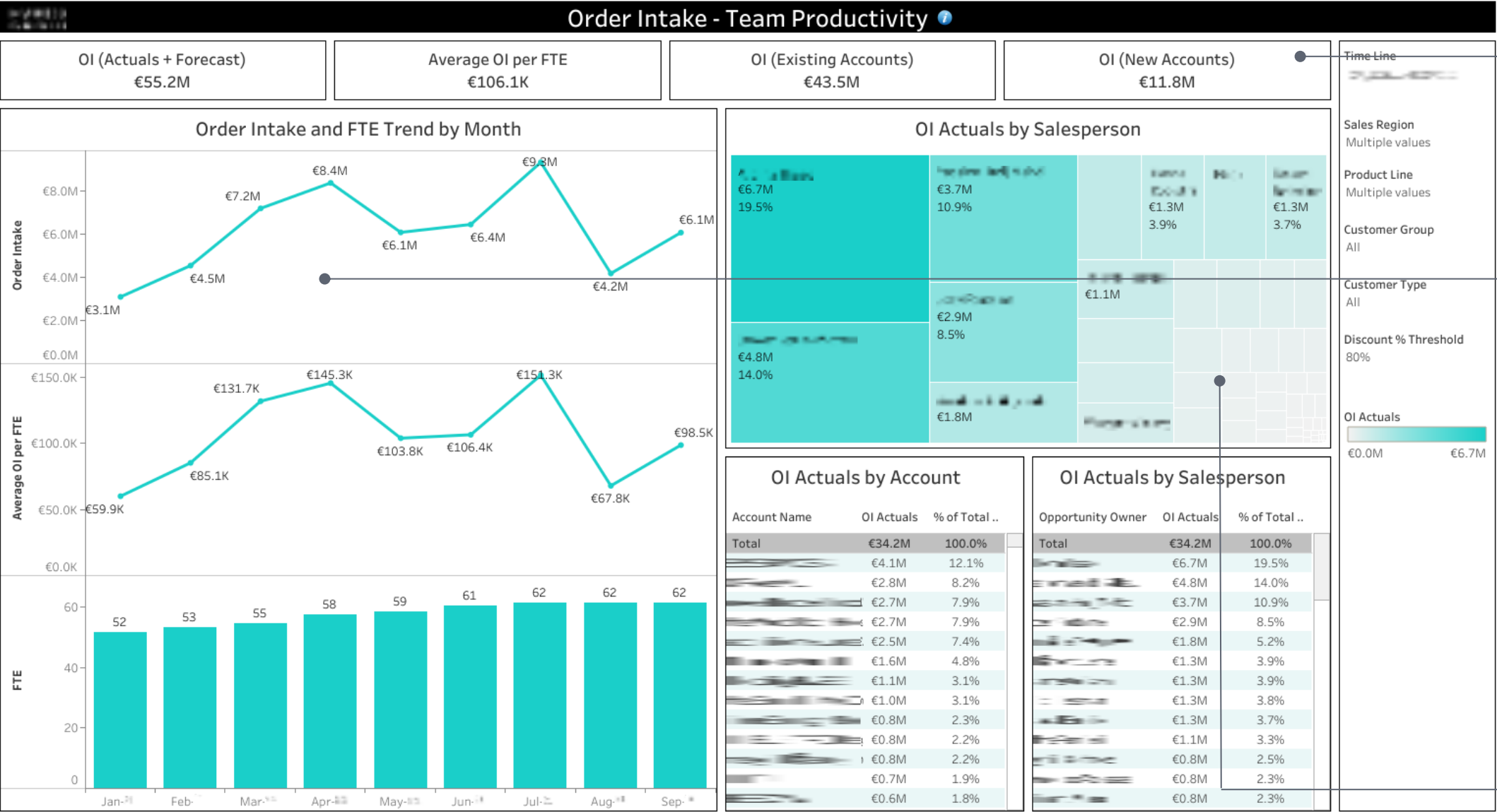
- Real-time availability of the dashboards saved around 40 man-hours/week to develop reports
- The new discount framework helped the team reduce the overall discount offered by 2 percentage points

Approach & methodology





Team productivity



KPI cards display OI by different account types, average at FTE

Visual to show the monthly team productivity

Tree-map and table showcasing the productivity of each salesperson

Sales cycle time

