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

Accordion Value Add

- 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

Data Warehouse

snowflake

Contains Salesforce Data

Excel Extracts

PostgreSQL
SQL DB

Tableau Prep

Designing the Data Model for the Dashboards

Tableau Desktop

tableau
Desktop

Defining KPIs and Creating Dashboards

Tableau Online

tableau ONLINE

Dashboards are published online for real-time accessibility to stakeholders

Sales executive summary

Sales Executive Summary

OI Actuals €34.2M	OI Budget €25.1M	Delta OI Actuals vs. Budget (€) €9.1M	Delta OI Actuals vs. Budget (%) 36.1%	Discount (€) €15.5M	Discount (%) 31.3%

Order Intake Actuals vs. Budget by Month

Legend: OI Actuals, OI Budget

	Jan	Feb	Mar	Apr	May	Jun	Jul
OI Actuals	€2.7M	€4.2M	€6.0M	€8.1M	€5.9M	€6.2M	€1.1M
OI Budget	€2.3M	€2.7M	€3.2M	€4.0M	€4.5M	€4.5M	€3.8M
Delta Actuals vs. Budget	€0.4M	€1.5M	€2.8M	€4.1M	€1.4M	€1.6M	-€2.7M
Delta Actuals vs. Budget (%)	16.3%	55.0%	87.3%	103.7%	29.8%	36.1%	-71.4%

Discount (%) Trend by Month

Jan	Feb	Mar	Apr	May	Jun	Jul
30.6%	32.2%	31.7%	29.7%	31.6%	32.7%	28.6%

Avg. and Median Order Value by Month

Average: €7.2K, €15.1K, €20.9K, €26.8K, €25.7K, €24.0K, €18.3K
Median: €1.0K, €1.7K, €2.2K, €3.2K, €3.7K, €4.8K, €5.5K

FTE and Average Order Intake Actuals per FTE

Avg. OI Actuals per FTE: €59.9K, €85.1K, €131.7K, €145.3K, €103.8K, €106.4K, €17.9K
FTE: 52, 53, 55, 58, 59, 61, 62

Legend: Avg. OI Actuals per FTE, FTE

Delta (€) - Heatmap by Region and Product Line

Scale: -€9.6M to €6.6M

Sales Region								Total
	€2.9M	€1.1M	-€0.5M	€0.0M	-€0.5M	-€0.4M	-€0.5M	€2.2M
	€6.1M	€0.2M	-€0.6M	€0.4M	€0.0M	-€0.6M	-€0.1M	€5.3M
	-€0.3M	-€0.1M	-€0.3M	€0.0M	-€0.1M	€0.0M	€0.0M	-€0.8M
	€0.4M	€3.5M	€1.3M	€0.4M	€0.0M	-€0.3M	-€0.2M	€5.1M
	-€0.1M	-€0.1M	-€0.4M	€0.0M	€0.0M	€0.0M	€0.0M	-€0.6M
	€0.5M	€0.3M	-€0.2M	€0.0M	€0.0M	€0.0M	€0.0M	€0.6M
	-€2.5M	-€0.5M	-€2.5M	€0.0M	-€0.1M	-€9.6M	-€0.3M	-€15.4M
	€0.0M	€1.0M	€0.3M	€0.1M	€0.0M	€0.0M	-€0.1M	€1.3M
	€6.6M	€2.1M	€0.7M	€0.8M	€0.0M	€0.8M	€0.0M	€11.1M
	-€1.1M	-€1.5M	-€2.2M	€0.0M	-€2.1M	€0.0M	€0.0M	-€6.9M
	€0.5M	-€0.2M	-€0.3M	-€0.1M	€0.0M	-€0.1M	€0.0M	-€0.1M
Total	€13.1M	€5.9M	-€4.6M	€1.7M	-€2.7M	-€10.3M	-€1.2M	€1.9M

Top-15 Accounts by Order Intake Actuals

Account Name	OI Actuals	Discount (%)	% of Total OI Actuals	Discount (%) vs. Partner Program
	€4.1M	38.6%	12.1%	
	€2.8M	34.1%	8.2%	
	€2.7M	31.7%	7.9%	
	€2.7M	34.7%	7.9%	
	€2.5M	31.6%	7.4%	
	€1.6M	32.8%	4.8%	
	€1.1M	34.9%	3.1%	
	€1.0M	32.5%	3.1%	
	€0.8M	30.0%	2.3%	
	€0.8M	25.0%	2.2%	
	€0.8M	26.1%	2.2%	
	€0.7M	38.7%	1.9%	
	€0.6M	30.6%	1.8%	
	€0.6M	28.5%	1.7%	
	€0.4M	0.0%	1.2%	
Sub-Total	€23.2M	33.3%	67.8%	
Remaining Accounts	€11.0M	26.6%	32.2%	
Sub-Total	€11.0M	26.6%	32.2%	
Total	€34.2M	31.3%	100.0%	

Filter pane:
- Timeline
- Sales Region: Multiple values
- Product Line: Multiple values
- Customer Group: All
- Customer Type: All
- Discount % Threshold: 80%
- Top N Accounts: 15

Discount (%) vs. Partner Program: Higher, In-Line, Lower

OI Threshold, Discount % Inputs for Partner Program:
- Exploring €100K 15%
- Elevating €500K 20%
- Energizing €1,000K 25%
- Electrifying €1,500K 30%
- Revolutionary €2,500K 30%

Filter pane to provide flexibility to change timeframe, sales region, product & customer categories

Clustered bar chart to showcase monthly comparison between Order Intake (OI) actuals vs. budget

Table to show Top-15 accounts by their OI actuals

Team productivity

Order Intake - Team Productivity ⓘ

OI (Actuals + Forecast)	Average OI per FTE	OI (Existing Accounts)	OI (New Accounts)
€55.2M	€106.1K	€43.5M	€11.8M

Order Intake and FTE Trend by Month

Order Intake:
€3.1M, €4.5M, €7.2M, €8.4M, €6.1M, €6.4M, €9.3M, €4.2M, €6.1M

Average OI per FTE:
€59.9K, €85.1K, €131.7K, €145.3K, €103.8K, €106.4K, €151.3K, €67.8K, €98.5K

FTE:
52, 53, 55, 58, 59, 61, 62, 62, 62

Months: Jan-, Feb-, Mar-, Apr-, May-, Jun-, Jul-, Aug-, Sep-

OI Actuals by Salesperson

€6.7M 19.5% | €3.7M 10.9% | €1.3M 3.9% | €1.3M 3.7%
€4.8M 14.0% | €2.9M 8.5% | €1.1M
| €1.8M |

Time Line

Sales Region Multiple values

Product Line Multiple values

Customer Group All

Customer Type All

Discount % Threshold 80%

OI Actuals €0.0M — €6.7M

OI Actuals by Account

Account Name	OI Actuals	% of Total ..
Total	€34.2M	100.0%
	€4.1M	12.1%
	€2.8M	8.2%
	€2.7M	7.9%
	€2.7M	7.9%
	€2.5M	7.4%
	€1.6M	4.8%
	€1.1M	3.1%
	€1.0M	3.1%
	€0.8M	2.3%
	€0.8M	2.2%
	€0.8M	2.2%
	€0.7M	1.9%
	€0.6M	1.8%

OI Actuals by Salesperson

Opportunity Owner	OI Actuals	% of Total ..
Total	€34.2M	100.0%
	€6.7M	19.5%
	€4.8M	14.0%
	€3.7M	10.9%
	€2.9M	8.5%
	€1.8M	5.2%
	€1.3M	3.9%
	€1.3M	3.9%
	€1.3M	3.8%
	€1.3M	3.7%
	€1.1M	3.3%
	€0.8M	2.5%
	€0.8M	2.3%
	€0.8M	2.3%

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

Table to find time spent on each of the Top-20 orders

Visuals to showcase sales cycle time by customer classifications