



Industrial Parts Manufacturer

(Sales opportunity analysis and customer dashboard)

Developed various sales **dashboards on Tableau to identify** cross-selling and up-selling opportunities and track **key business performance metrics** across product and customer categories by **integrating data from discrete sources and reconciling with Financial reports**

SALES OPPORTUNITY ANALYSIS AND CUSTOMER DASHBOARD

ABOUT THE CLIENT

Client is one of the **largest industrial parts manufacturer for a niche category, in North America** and has specialized manufacturing and distribution entities spread across the continent

SITUATION



- Client was **unable to estimate the current level of bundling or identify cross-sell/up-sell opportunities** due to discrete and scattered data systems which made it difficult for the sales teams to analyze the data
- Merilytics partnered with the client to **analyze invoice level internal data, mine industry level external data and calculate relevant KPIs** to provide visibility into sales opportunities and create a customer dashboard

VALUE ADDITION



- Identified cross-sell/up-sell opportunities for each customer** by analyzing the mix of product categories purchased by the customer and comparing it to the industry standards as well as other customers
- Estimated the current level of bundling by entity, region and customer** by analyzing the invoice level data and categorizing SKUs into relevant categories
- Evaluated the impact of historical price changes on each customer** by reviewing the SKU mix of the customer and company level price changes
- Developed a historical view of the relationship** with the customer to visualize historical sales and associated trends by category, SKU and region

IMPACT



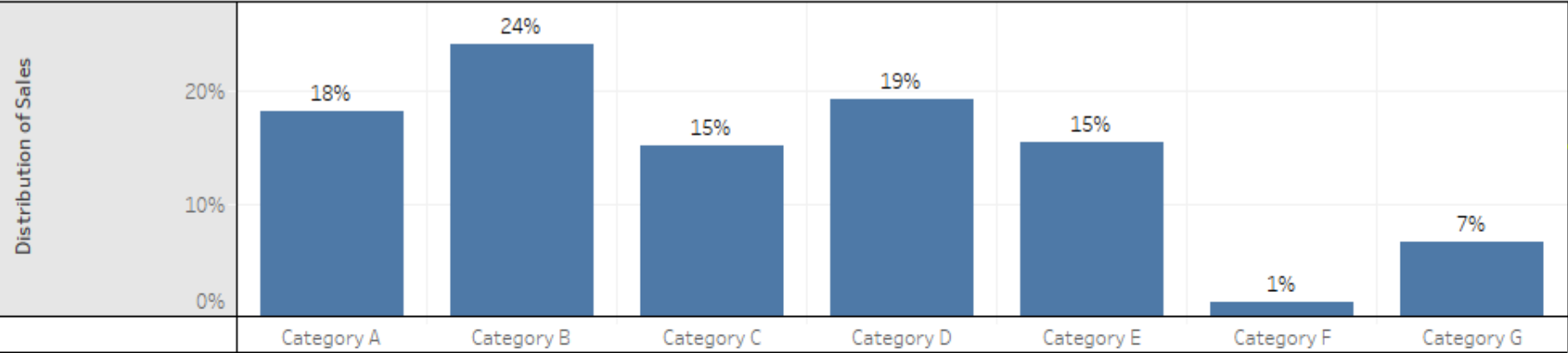
- Enabled the sales team to be targeted** during its customer meetings due to the added ability to access data in a clean and analyzable format with opportunities and historical tendencies highlighted
- Provided the management a view on the current level of bundling and associated trends** which enabled the management team to set targets for the upcoming year

IDENTIFICATION OF UP-SELLING OPORTUNITIES WITH EACH CUSTOMER

ACROSS PRODUCT CATEGORIES

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Industry standard Sales distribution across Product Categories



This chart shows the industry standard distribution of sales across different categories, which is used as a comparison point to identify upselling opportunities

Sales distribution across Product Categories by Customer

Customer	Category A	Category B	Category C	Category D	Category E	Category F	Category G
Customer A	39%	18%	12%	17%	11%	0%	3%
Customer B	15%	24%	17%	22%	17%	1%	4%
Customer C	5%	32%	11%	26%	22%	0%	3%
Customer D	7%	21%	11%	25%	29%	0%	5%
Customer E	7%	22%	16%	20%	24%	0%	10%
Customer F	18%	25%	21%	3%	20%	0%	13%
Customer G	29%	18%	15%	12%	19%	0%	7%
Customer H	15%	21%	13%	26%	17%	0%	7%
Customer I	51%	17%	8%	9%	8%	0%	8%

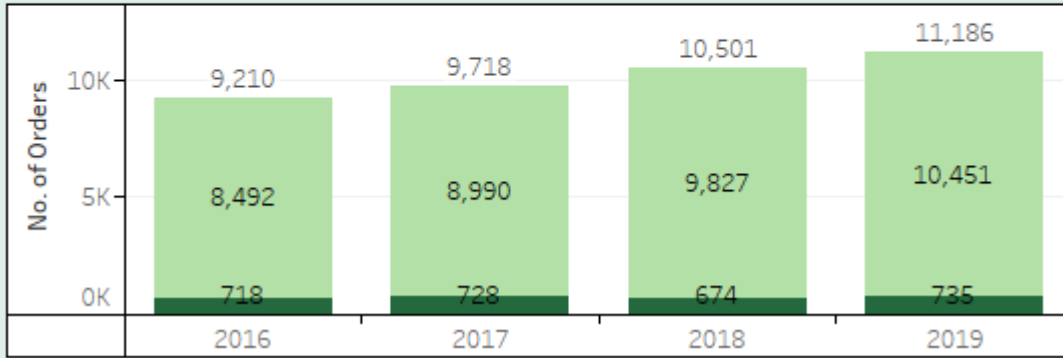
This chart shows the distribution of sales of any customer across the product categories which when compared with the industry standard distribution gives us the opportunity available in upselling

The percentage shares shown in green are above the industry standard share and those highlighted in red are potential upselling opportunities

PRODUCT BUNDLING TRENDS AND DISTRIBUTION ACROSS CATEGORIES

YoY Bundling Trends

Non-Bundled Bundled



This chart gives the trend in the share of orders that are bundled across the years

Distribution of bundled sales across product categories in Last Twelve Months (Sep'18 to Aug'19)

Category	Category A	Category B	Category C	Category D	Category E	Category F	Category G	Non-Bundled	Grand Total
Category A		20.6%			18.4%		5.0%	56.0%	100.0%
Category B	3.0%			0.1%	1.4%	0.0%	0.6%	94.9%	100.0%
Category C				9.8%		3.0%	84.2%	3.0%	100.0%
Category D								100.0%	100.0%
Category E		1.3%	4.0%		0.0%	5.0%	34.7%	55.0%	100.0%
Category F	8.8%	34.1%		0.0%		0.0%	19.8%	37.3%	100.0%
Category G		0.5%	0.8%	11.5%	0.2%		52.6%	34.4%	100.0%

This chart provides a clear picture of bundling across the product categories and helps in identifying the opportunities for cross-selling

EVALUATED IMPACT OF PRICE CHANGES ACROSS CUSTOMERS AND PRODUCT CATEGORIES

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Units and Realized Price Growth Trends by Customer for 2019 YTD Sales (YTD: Jan to 30th Sep)

Note: Pressing on the + button, which appears upon hovering on 'Customer', allows to drill down to the Customer branch and SKU level details

Customer	\$ sales (YTD)	Units (YTD)	A.S.P (YTD)	Units Growth (YTD)	Realized Price Growth..
Customer A	\$1,681,788	6,508	\$2,948	22.4%	8.8%
Customer B	\$1,361,441	8,755	\$2,154	60.0%	7.5%
Customer C	\$1,283,882	4,119	\$4,461	40.0%	9.0%
Customer D	\$732,628	48,306	\$8,557	-36.8%	2.6%
Customer E	\$719,636	4,535	\$1,752	39.8%	5.2%
Customer F	\$628,623	1,463	\$5,231	178.3%	6.1%
Customer G	\$502,126	1,209	\$9,782	172.5%	-5.9%
Customer H	\$473,969	3,167	\$5,092	87.7%	3.7%
Customer I	\$427,538	999	\$4,397	-27.2%	9.7%

This chart provides the list of top customers along with the realized impact of price changes. This was evaluated by considering the SKU mix purchased by each customer.

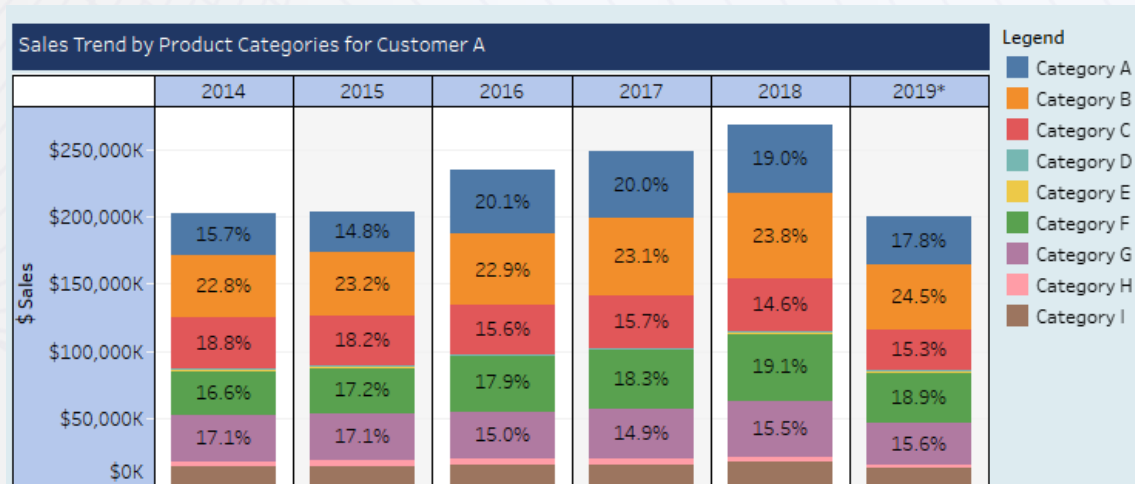
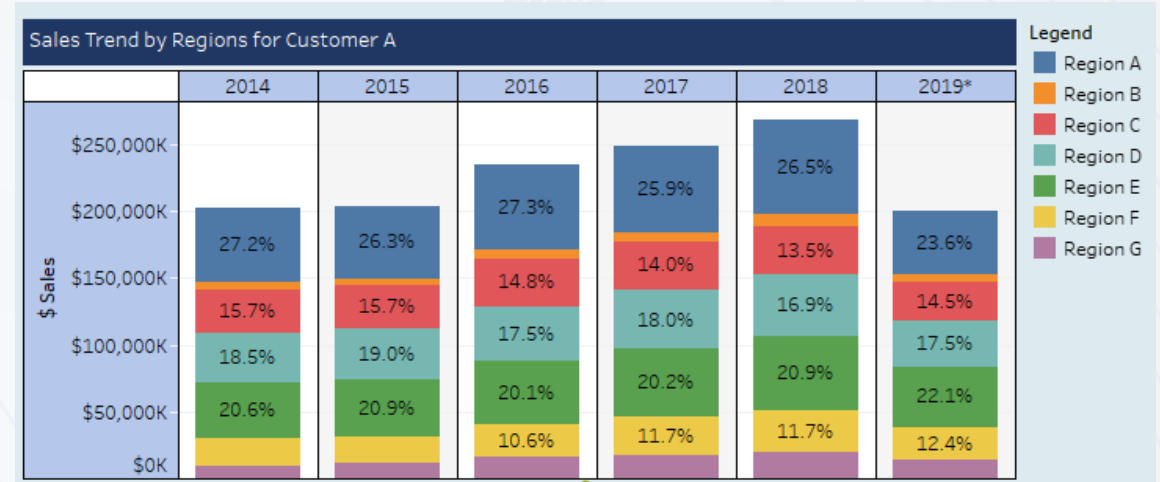
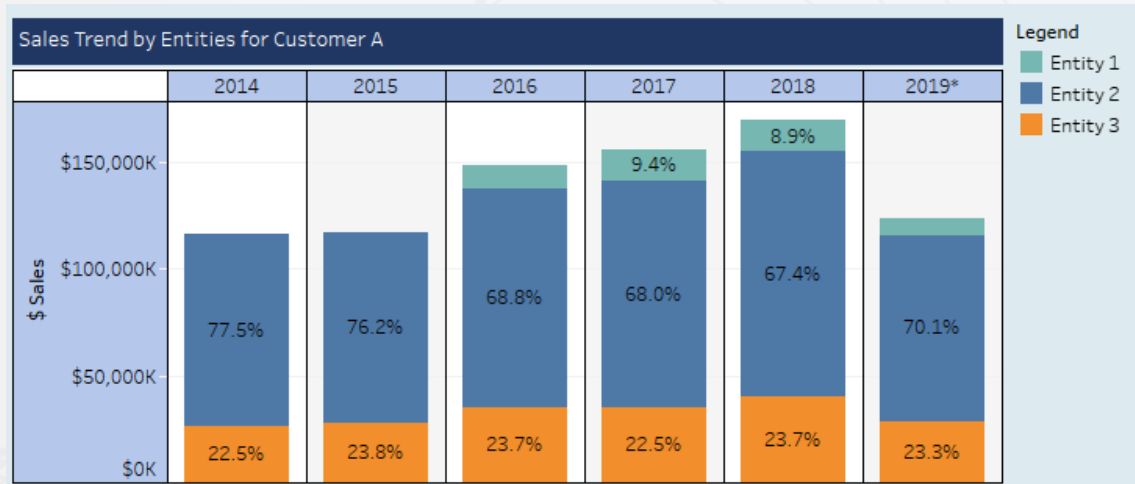
Units and Realized Price Growth by Product Category for 2019 YTD Sales (YTD: Jan to 30th Sep)

Note: Pressing on the + button, which appears upon hovering on 'Product Category', allows to drill down to the SKU level details

Category	\$ sales (YTD)	Units (YTD)	A.S.P (YTD)	Units Growth (YTD)	Realized Price Growth (YTD)
Grand Total	\$16,555,012	173,714	\$3,348	13.8%	6.1%
Category A	\$1,835,561	154	\$13,222	24.6%	-2.0%
Category B	\$4,084,599	30,607	\$669	132.5%	8.0%
Category C	\$1,903,400	485	\$8,536	97.9%	6.4%
Category E	\$2,617,194	134,238	\$390	-0.9%	8.0%
Category F	\$189,466	95	\$2,013	-15.0%	6.3%
Category G	\$4,914,983	4,220	\$2,003	147.9%	7.2%
Category H	\$127,015	329	\$1,019	82.5%	4.3%
Category I	\$882,794	3,586	\$907	108.4%	9.9%

This chart provides the category-wise realized impact of price changes by the customers. This was evaluated by considering the SKU mix purchased by customers in each category.

HISTORICAL VIEW OF CUSTOMER RELATONSHIPS

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These charts provide the historical relationships with any customer across different parameters