MAVEN TECH'S CRM DASHBOARD

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Business Problem

Maven Tech has implemented a new CRM system to better manage and monitor sales opportunities. However, managers lack a clear, consolidated view of team performance, pipeline health, and opportunity trends across regions, agents, and accounts. Without an interactive dashboard aggregating key insights, strategic decision-making is hindered, affecting sales growth and team optimization.

The sales manager has tasked the data analyst with building a dashboard that enables quarterly performance tracking, identification of top and underperforming agents, sales pipeline analysis, and account segmentation to support data-driven decisions and improve team efficiency.

Key Business Questions

1. How is each sales agent performing?
2. What is the current status and health of the sales pipeline by region and sector?
3. Which products are generating the most value, and in which sectors or regions?
4. How does the performance vary across managers and regional offices?
5. Are there trends or delays in deal stages that may indicate bottlenecks?
6. What types of accounts (e.g., size, sector, location) are converting best?

Dataset Overview

The dataset includes the following variables:

- Opportunity ID
- Sales Agent
- Manager
- Regional Office
- Product
- Product Series
- Account Name
- Year Account Was Established
- Account Age (Years)
- Number of Employees at Account
- Deal Stage
- Deal Engage Date
- Deal Close Date
- Sales Cycle Length (Days)
- Deal Close Quarter
- Deal Close Year
- Deal Close Value

VISUALIZATION CHOICES AND DASHBOARD NAVIGATION

Below the dashboard title banner, there are seven dropdown menus for selecting year, quarter, region, manager, sales agent, product series, and product. These filters update all charts simultaneously, allowing users to explore relationships between metrics across specific timeframes, regions, teams, or products series.

Users can begin with high-level KPIs (total close value and win rate) and then navigate into detailed performance by deal stage, product, sales agent, or client, depending on their needs.

The dashboard is organized into four sections, each highlighting a different aspect of the CRM system:

<u>Sales Performance section</u>

- Total Close Value: A card chart provides a quick snapshot of revenue performance.
- Win Rate %: A doughnut chart shows the proportion of outcomes (won vs. lost sales), making success rates easy to assess. The donut format also provides visual balance within a section containing three different visuals placed close together.
- Average Sales Cycle in Days: A horizontal bar chart that compares sales agents' average sales cycles, making it easy to see performance differences at a glance.

<u>Account Segmentation section</u>

Horizontal bar charts were chosen here because they are effective for comparing values across multiple accounts.

- Average Revenue by Account/Client
- Buying Accounts' Age
- Team Size of Buying Accounts

<u>Pipeline Insights section</u>

- Opportunities by Deal Stage: A pie chart highlights the proportion of each deal stage within the pipeline, helping users gauge overall pipeline health.
- Average Deal Size by Product: A column chart compares product categories side by side, making it simple to identify which products generate the largest deals.

<u>Product Performance section</u>

- Revenue by Product Series (MG, GTK, GTX): Waterfall-style visuals illustrate the contribution of individual products within each series to the total revenue of that category.

Clarifications for Users

The Maven Tech's CRM Dashboard is designed to be used as a template. The Sales Data sheet contains editable ranges that should be filled in or updated using information from the sales_pipeline file for the desired analysis period.

Protected ranges, identified by headers highlighted in gray, contain formulas that must remain unchanged. These formulas update automatically whenever the editable ranges are filled or modified.

As new items are created in the sales_team, products, and accounts sections, they must be updated in the dashboard template by reloading the sheet with the new information and deleting the old one, ensuring the new sheet has the exact same name so that the formulas used in the Sales_Data sheet continue to work.

Due to current limitations in Google Sheets, the dashboard does not support multiple selections for years, quarters, regions, managers, sales agents, or products.

To unselect an option in any dropdown menu press the Delete button, then all items in the menu are counted in the analysis.