

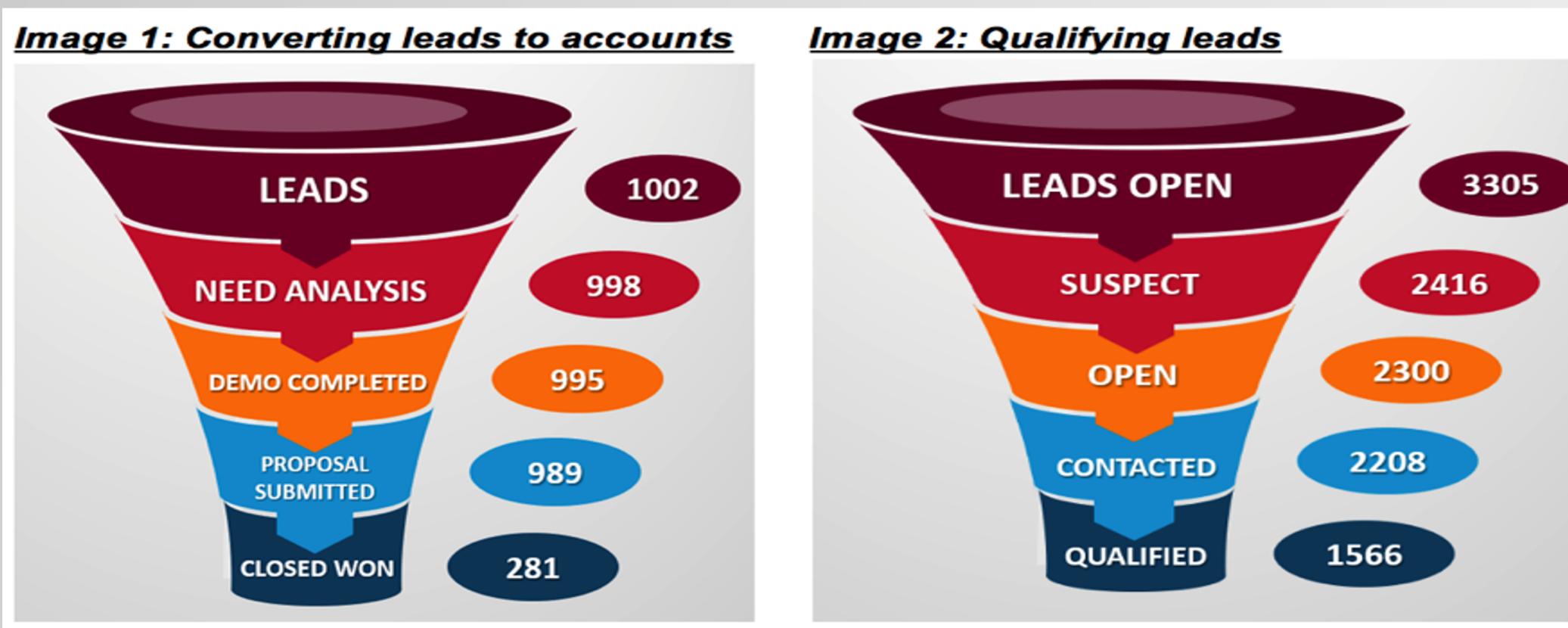


# Salesforce Data Analysis

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**Auto/Mate®**

## Project Description



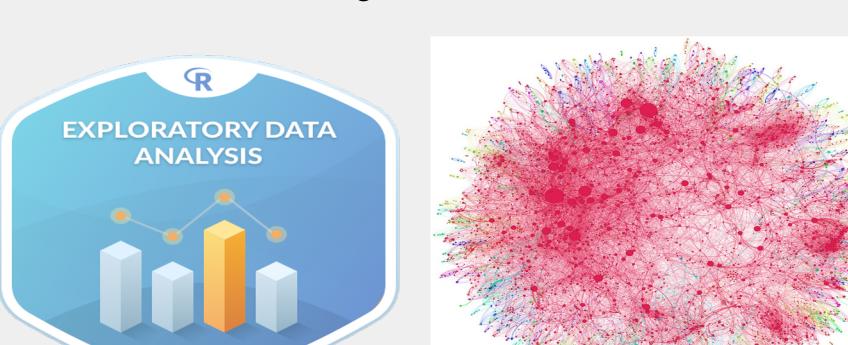
We are working with the Salesforce data of Auto/mate, to uncover the behavioral patterns of the leads through the sales funnel. Our aim is to help our client make more sales

## Tools & Technologies



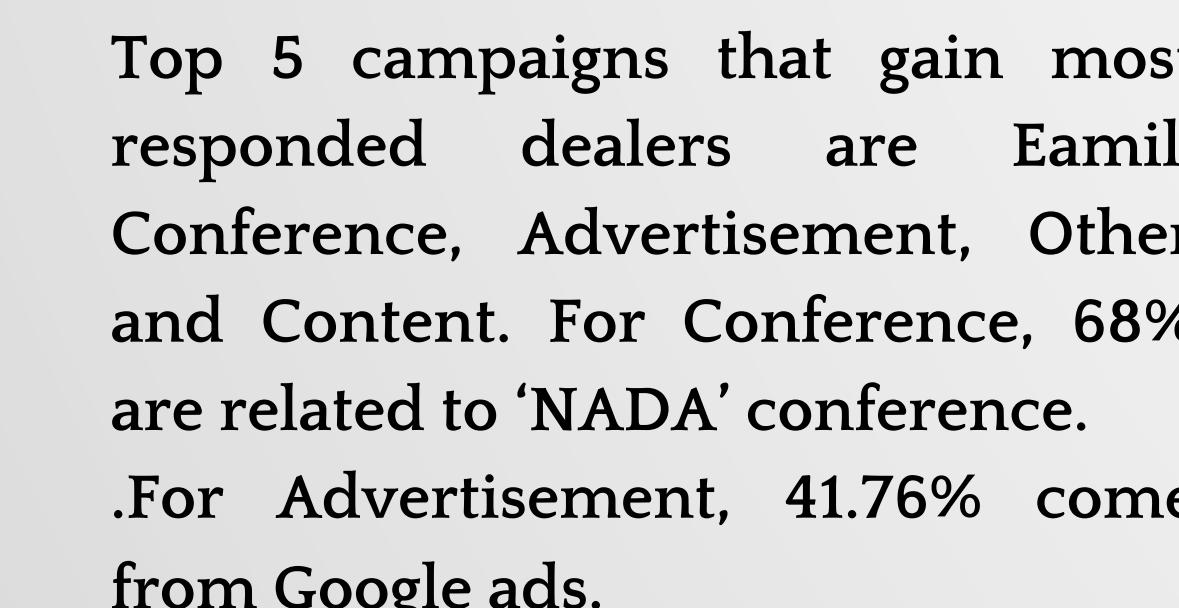
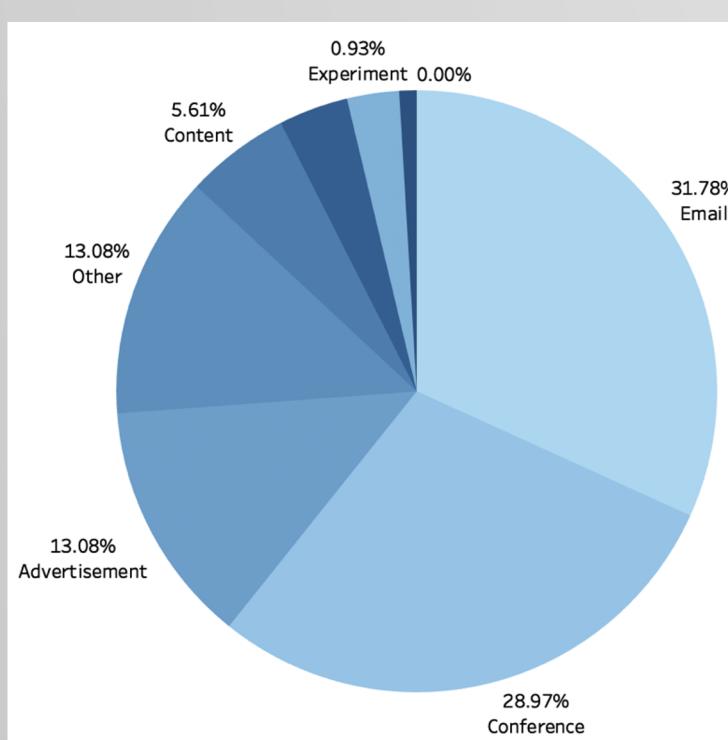
### Models and techniques:

- Time series analysis
- Logistic regression
- Decision trees
- Random forest algorithm



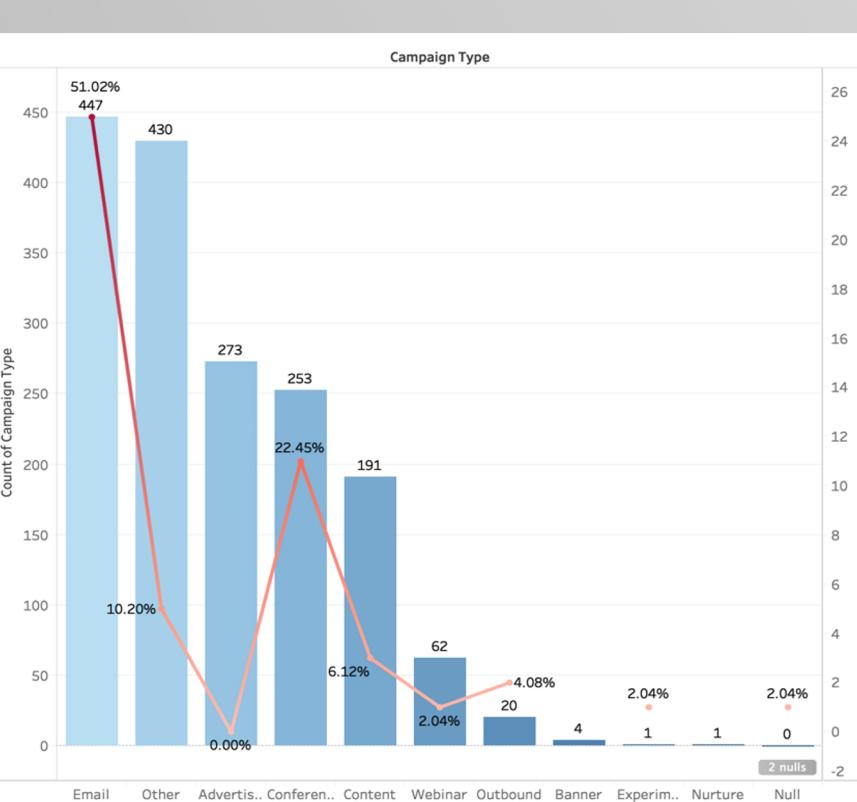
Multiple models and tools were used in different stages of the project

## Campaigns

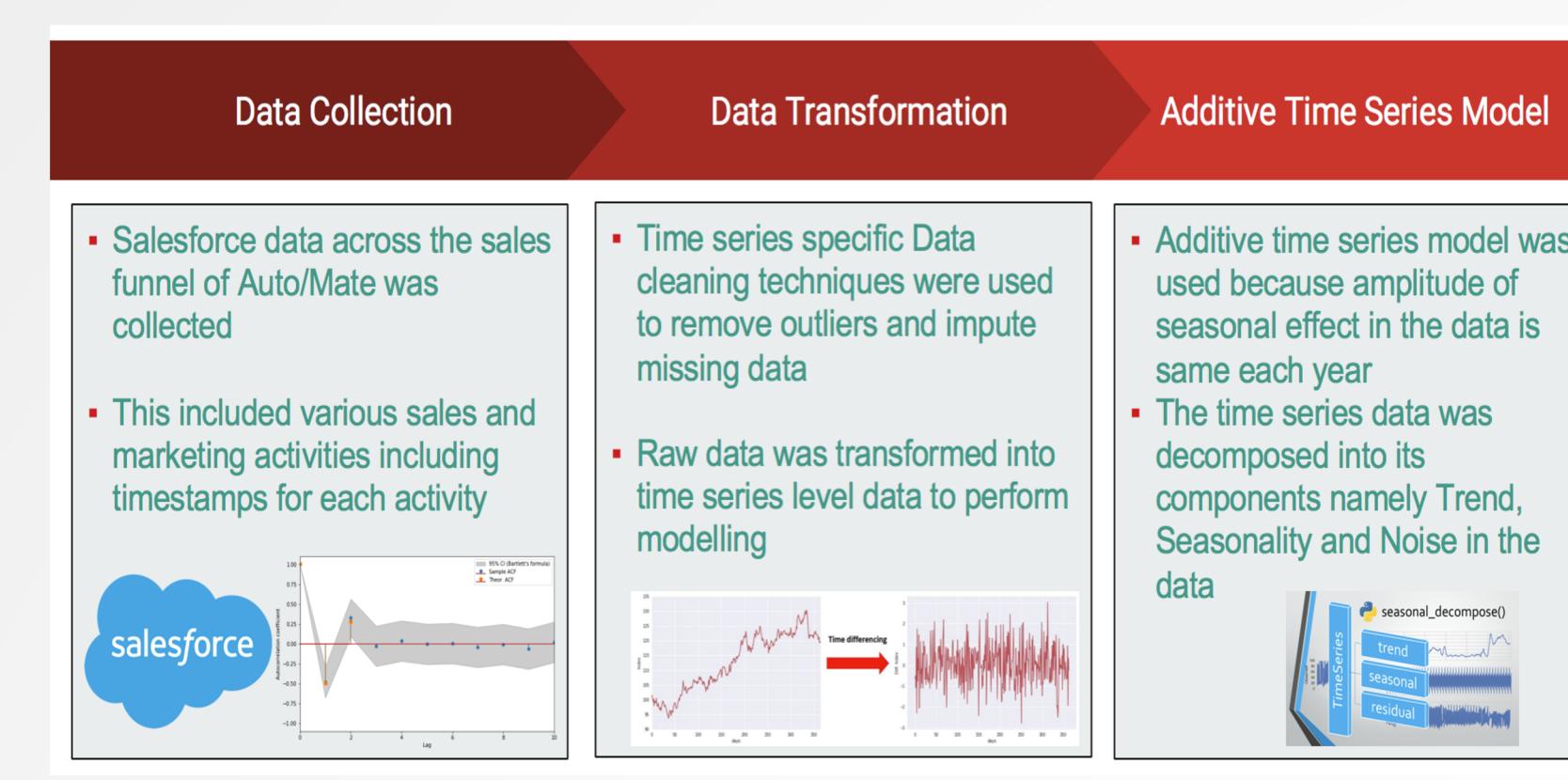


Top 4 campaigns that gain most closed won dealers are Email, Conference, Outbound, Content. For Conference, 71.1% are related to 'NADA' conference. For Outbound, 88% come from outbound calling. Email

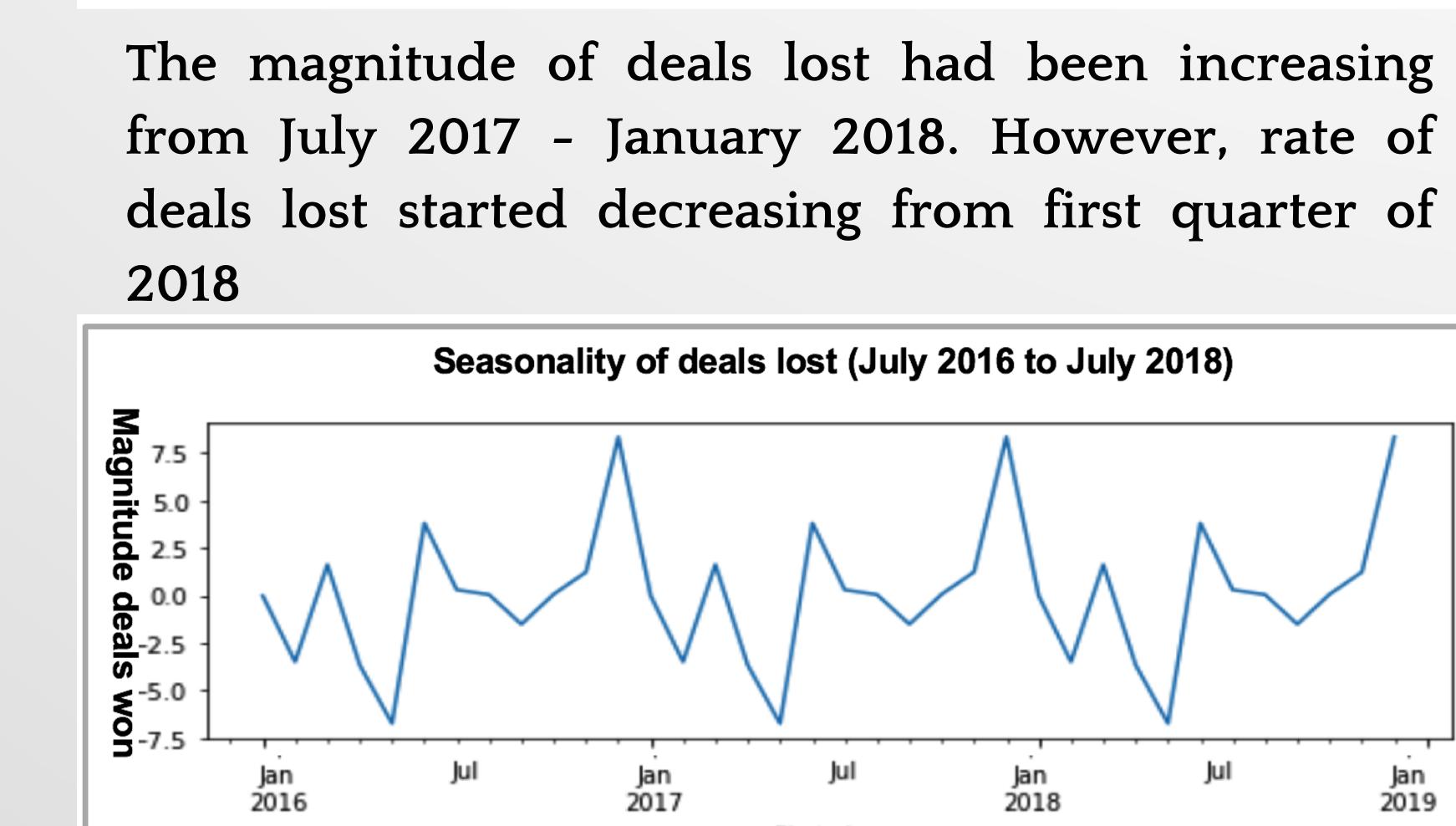
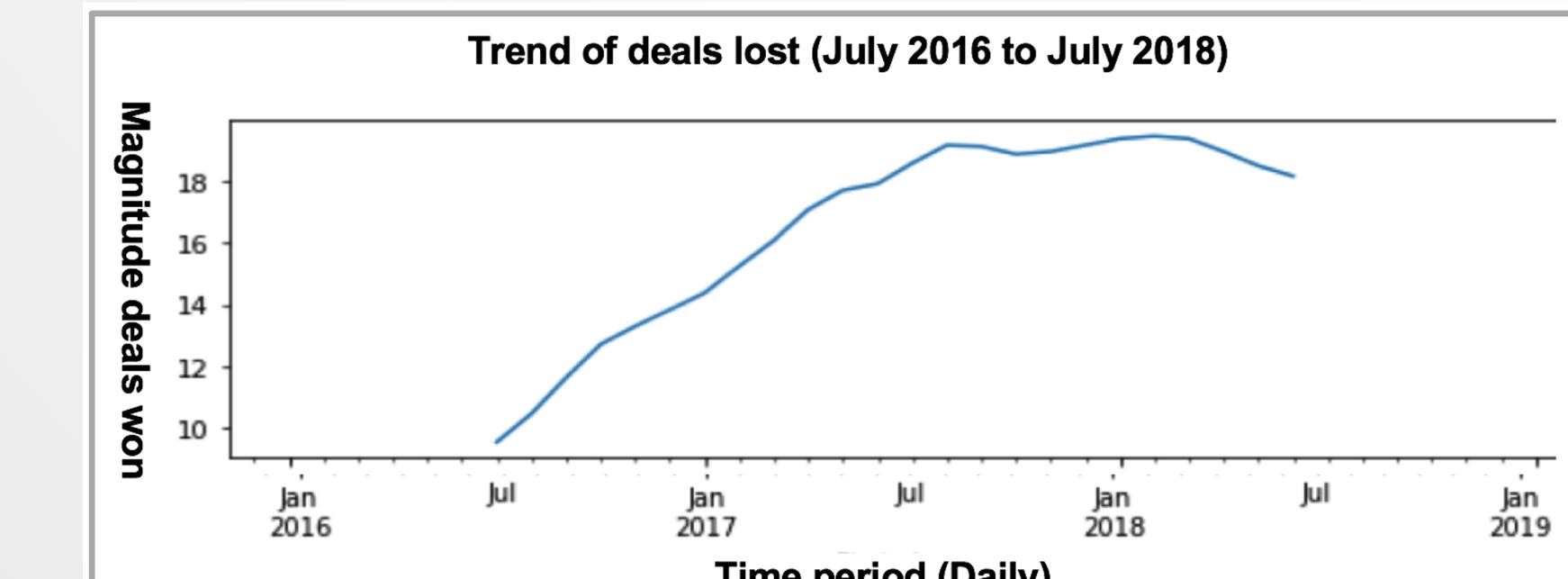
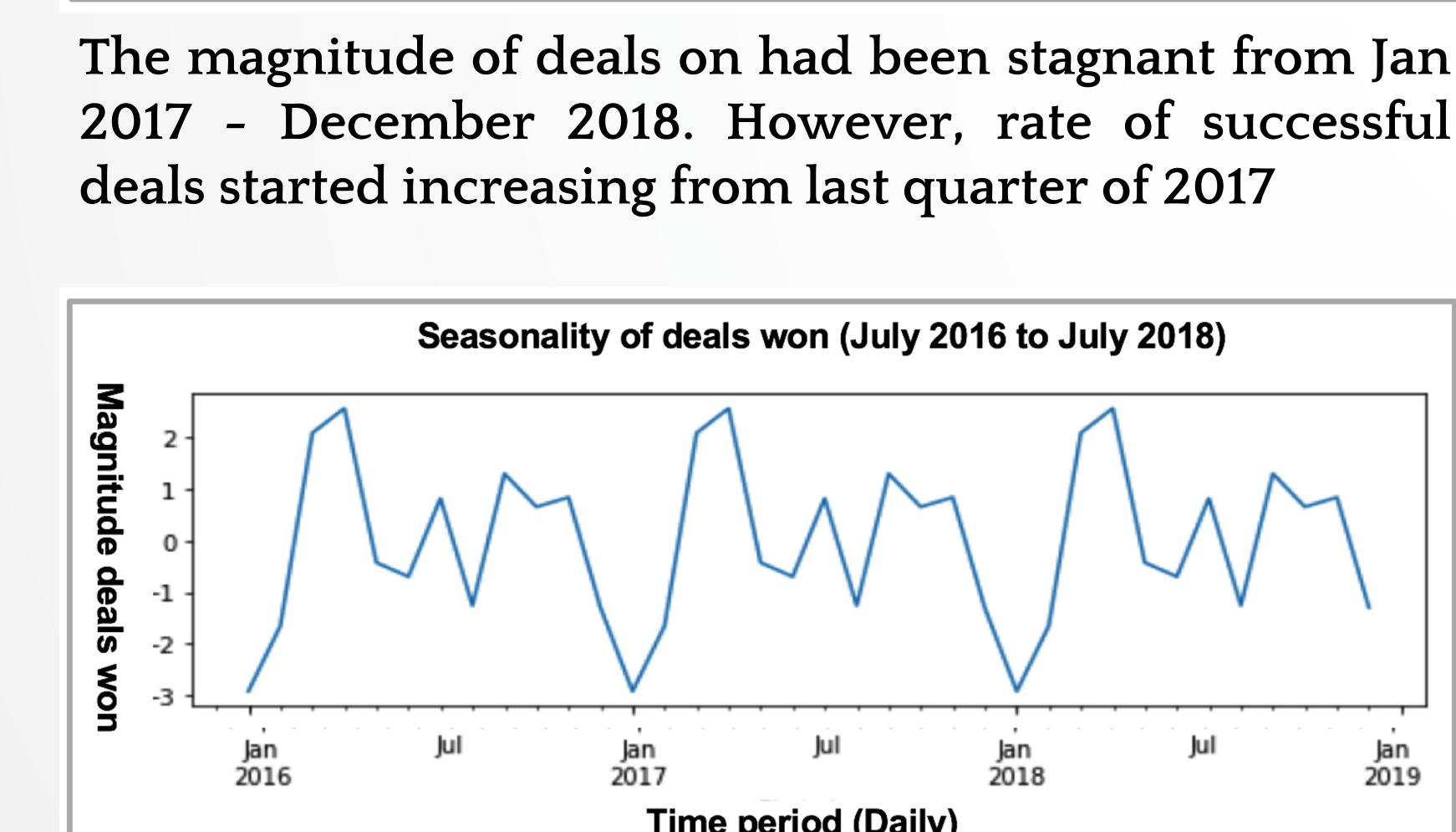
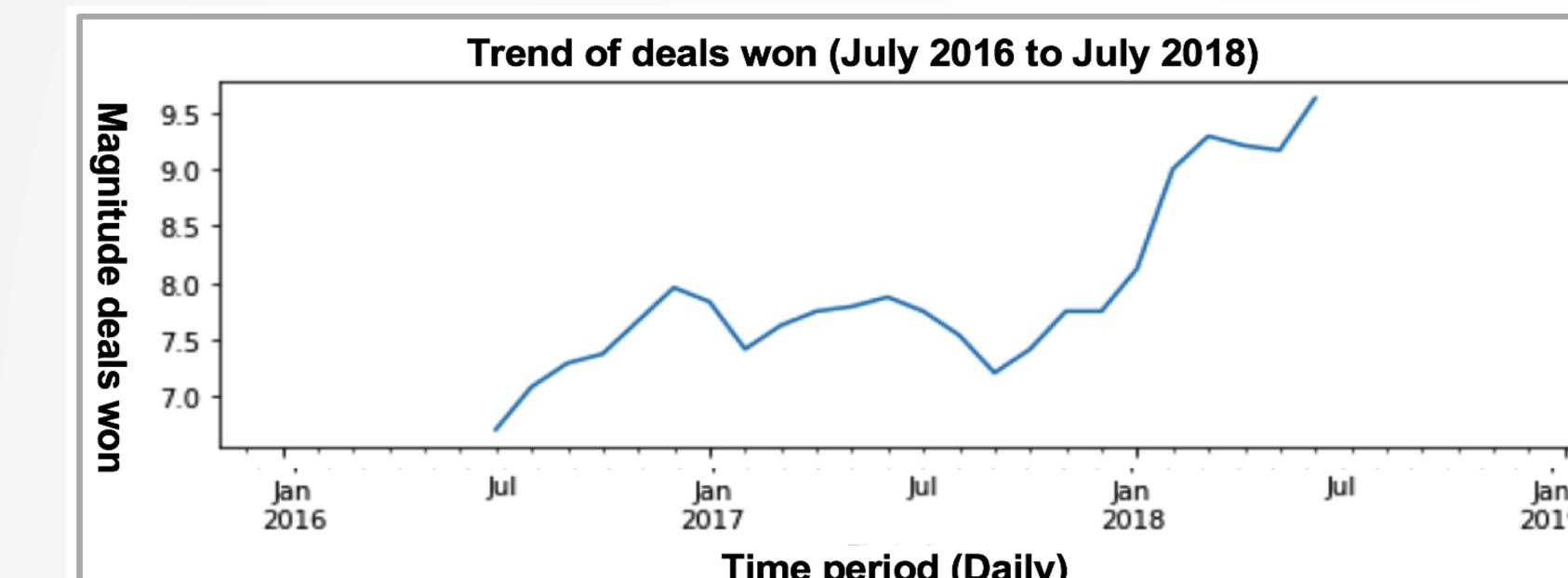
- Considering the number of conference the the percentage it contribute to closed won, conference is the best campaigns.
- Considering the number and expense of advertisements, it is a campaign that not really useful.



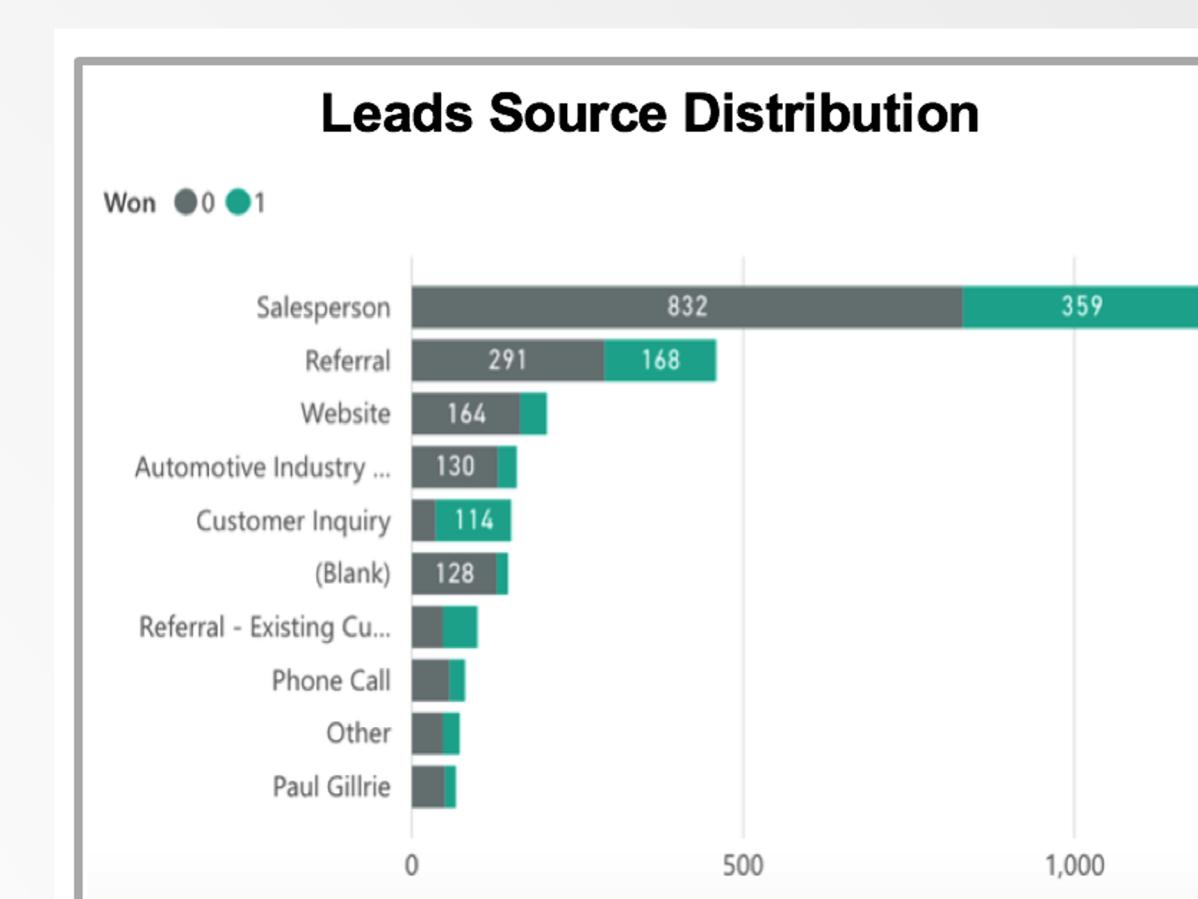
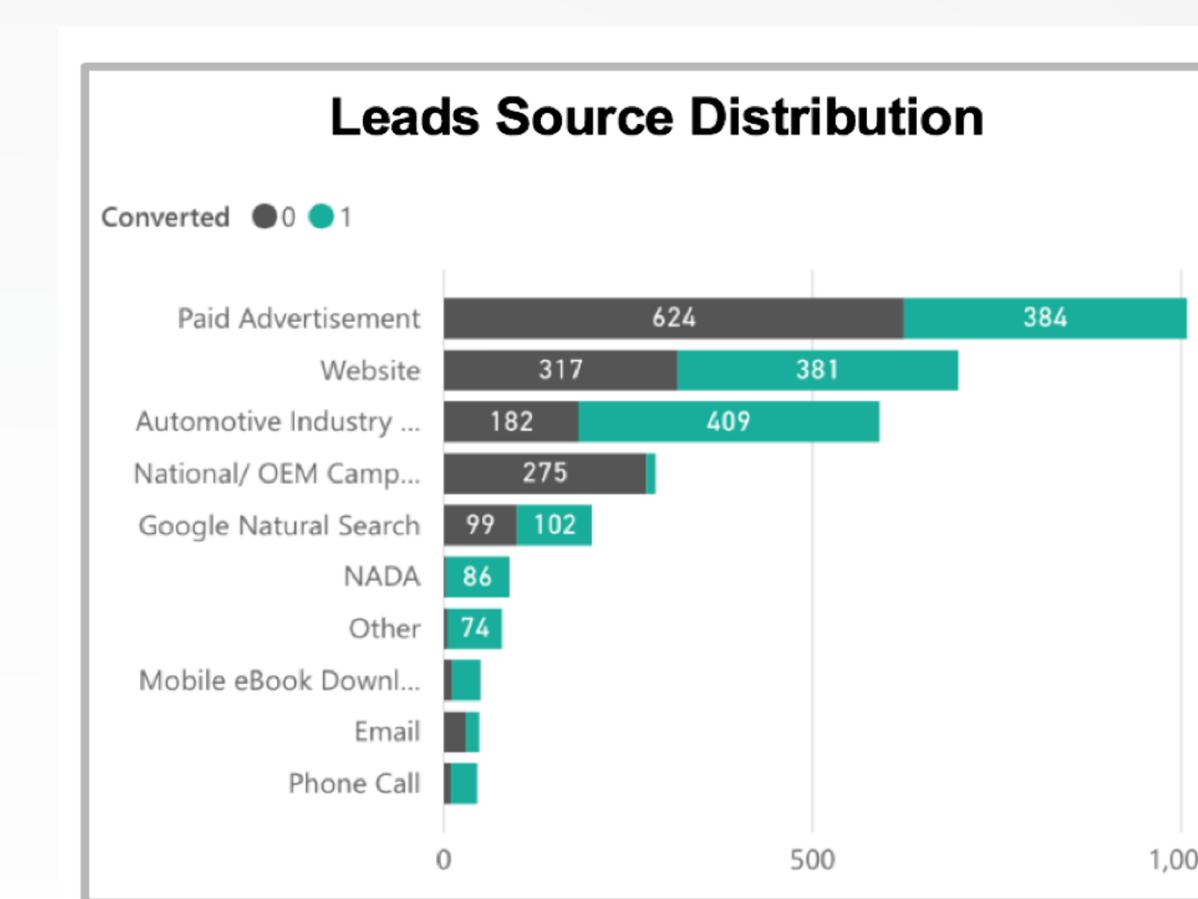
## Time Series Analysis



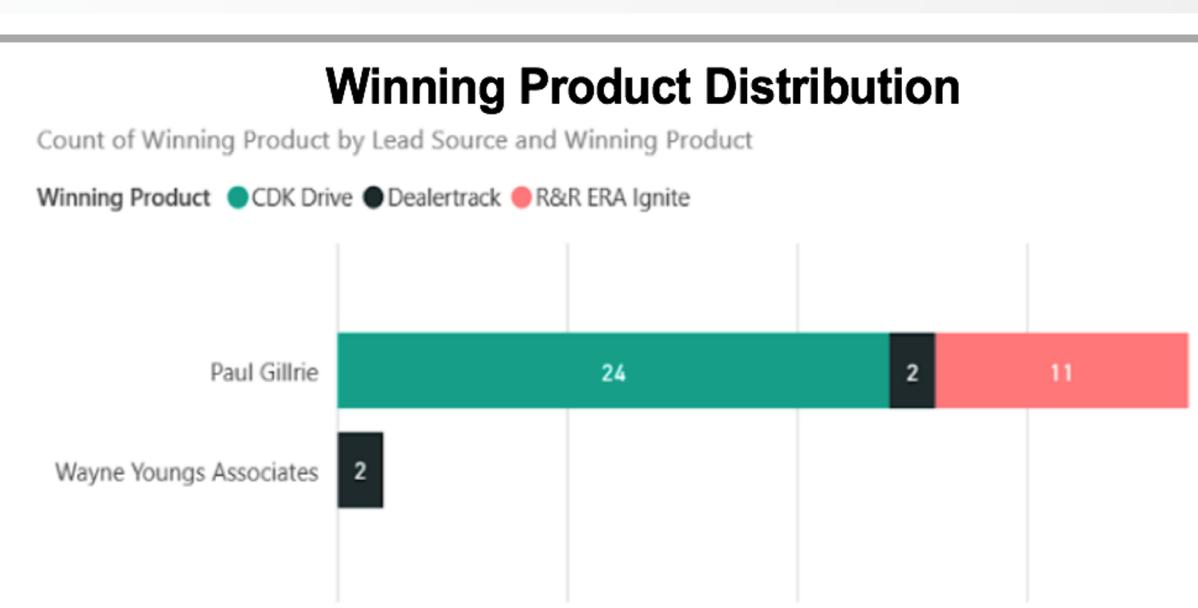
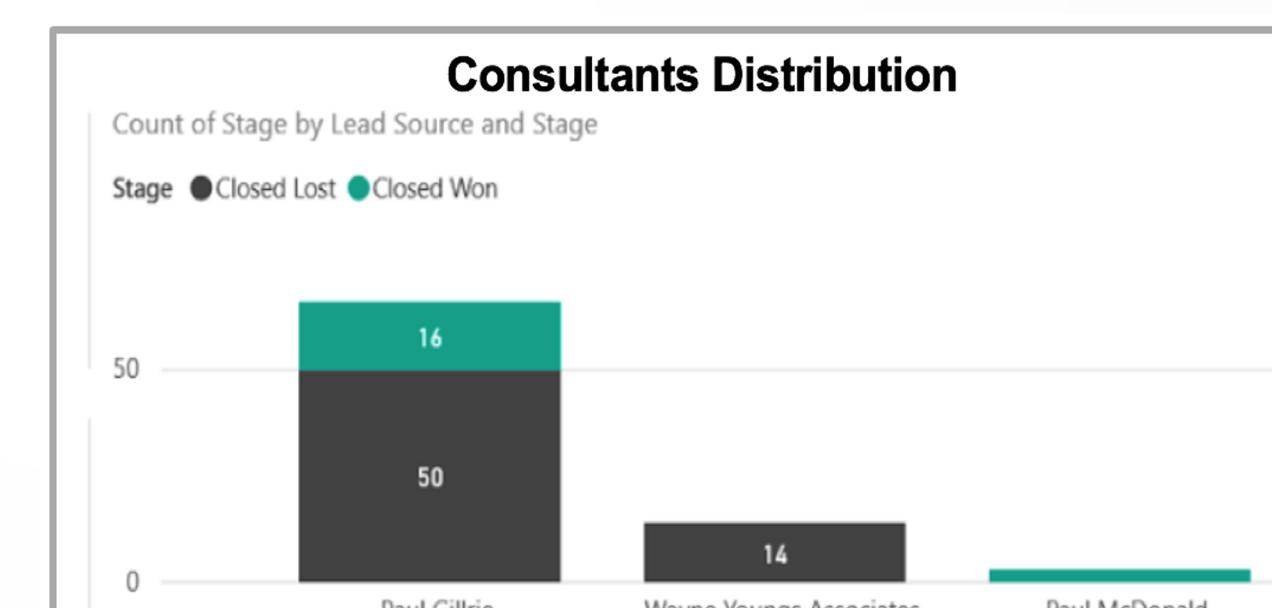
Salesforce Data from January 2016 to December 2018 was used



## Leads Source & Consultants



- High Conversion Rate: Automotive Industry Event, NADA
- High Conversion Speed: Paid Ads, Website, Automotive Industry Event
- More than half converted within only 1 week, most converted within 1 months
- High Won Rate: Customer Inquiry, Referral, Sales Person
- High Conversion & Close Speed: NADA, Hiring eBook Download
- From leads to closed won: most closed within 6 months



- Main consultants source: Paul Gillrie - 24% closed won
- All leads that are closed won have only 1 rooftop
- Main lost reason: "no change"

## Lost Reason Analysis

To be able to analyze lost reason, we had two variables. First one was a categorical variable "Lost Reason". The analysis on this variable did not result with key findings that are not already known to the company. So we were left with the second variable; "Lost Reason Comments". This variable was consisting of long strings without any structure or discernable pattern. We have tried different methods, like NLP techniques, regular expressions, string manipulations, however it did not add up to anything we can use. Moreover, the dataset was too small to implement any advanced methods. In the end, we have decided to just read these comments. A pattern emerged and we have found one main reason to explain why the company is losing deals : Upfront payments. The company's payment system includes two types of payment; upfront and monthly.

### Upfront Payments

- Installment
- Training

### Monthly Payments

+ No binding contract, continues as long as they stay as a customer

### Total Revenue

Upfront + Monthly x 12

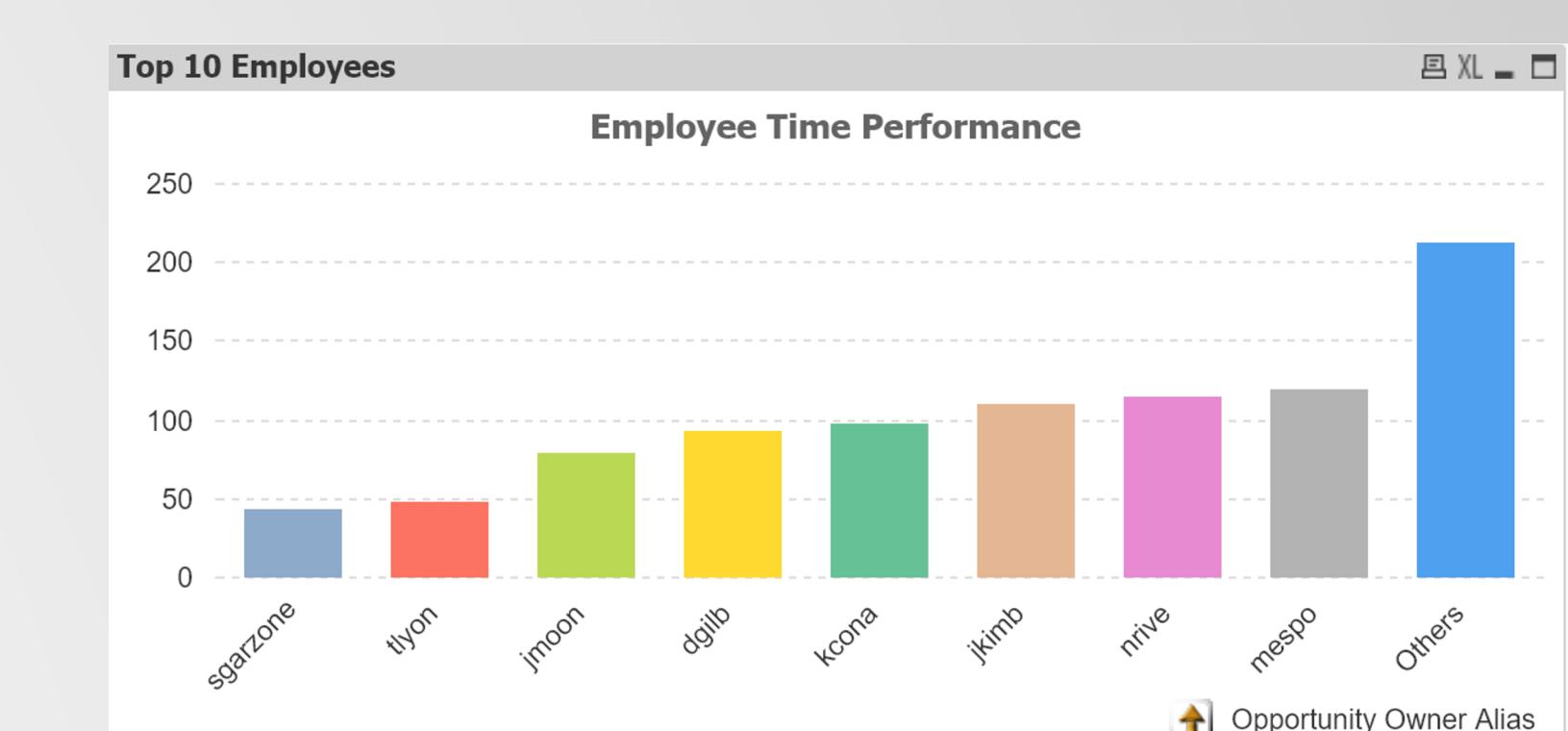
We found that in the last three years, they have lost 54 deals just because of upfront payments, while the number of deals they have won in total is 300. Considering the ratio between those two, this loss is substantial.

The data indicated that if the company can handle upfront payment issue, by dividing it into monthly installments or any other way, the result would be;

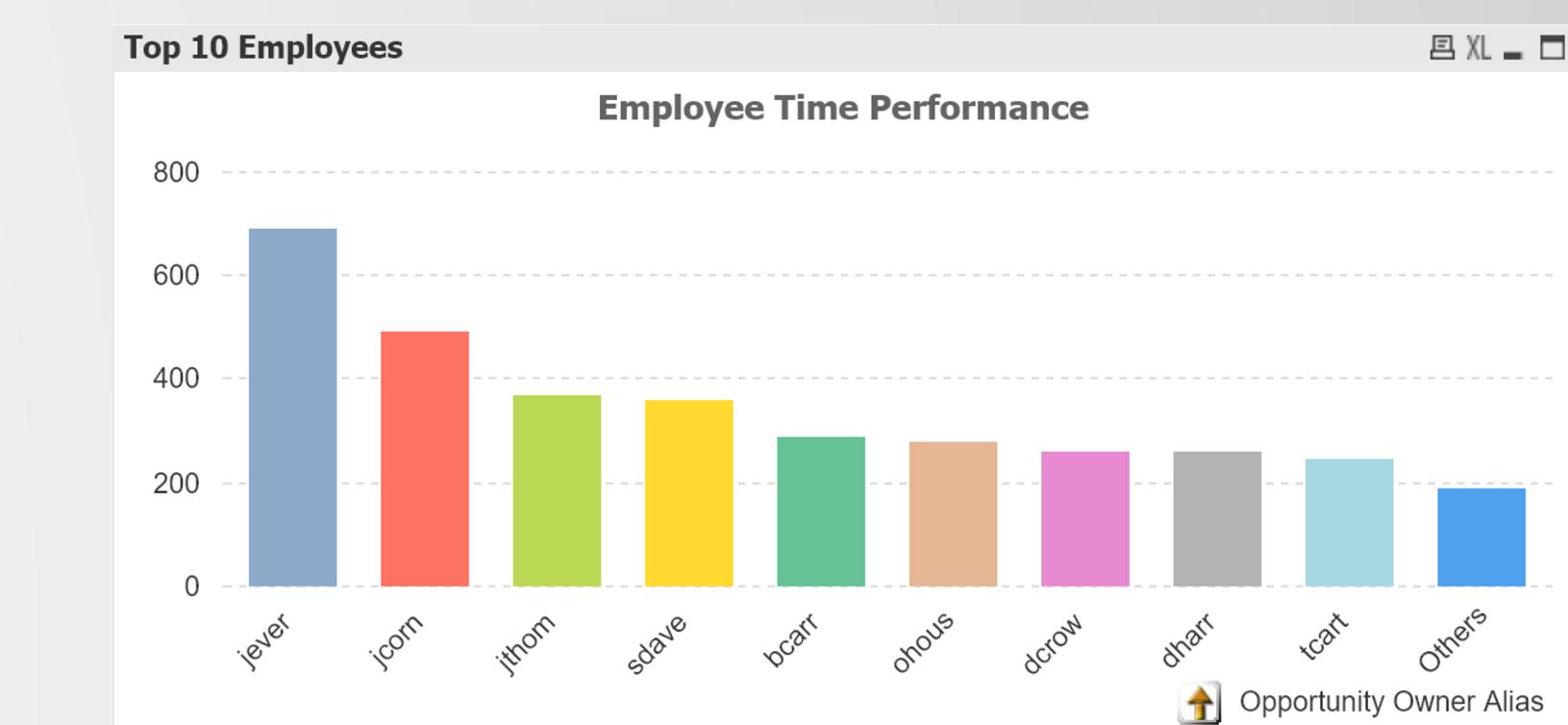
**Total Annual Revenue Gain = \$2,853,307**

## Employee Performance Analysis

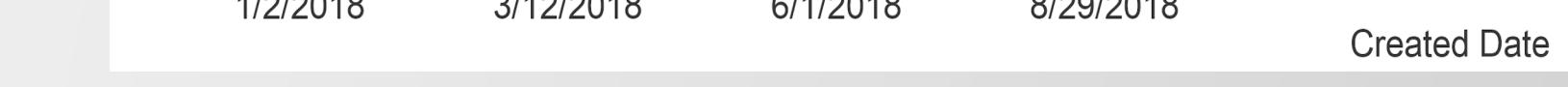
Below graph shows the fastest 10 employees in closing deals.



Below graph shows the slowest 10 employees in closing deals.



In general, deals lost takes a longer time to close than deals won.



## Conclusion

### TIME SERIES

The time series analysis suggests that aligning your marketing efforts to increase the volume of opportunities at hand in the first quarter of every year will lead to higher deals being won.

### CAMPAIGNS

Emails and conferences are the useful campaigns. However, we cannot conclude that using Emails will definitely bring successful business since every dealer received emails, but conferences should be exploited.

### CONSULTANTS

We recommend client to make exclusive campaigns whenever consultants are involved since they are an important source and it seems like they have not been utilized enough as of now.

### LEAD SOURCE

Automotive Industry events are important to be able to convert leads into opportunities, so they should be prioritized. Referrals are a highly useful source, mostly ending with a successful deal, so we recommend the company to focus on it.

### LOST REASON

We recommend the client to lower the upfront payments significantly. In a lot of cases, competitors completely removes the upfront payments to gain clients, so this should be taken into consideration.