

B2B Sales Performance Analytics

The Business Challenge:

The VP of Sales at a B2B technology firm faced a stagnating pipeline despite high lead volume. The organization lacked visibility into funnel leakage points, sales velocity by product, and individual agent efficiency, leading to inaccurate forecasting and missed revenue targets.

Key Objectives:

- Identify the exact stage where deals are dropping off.
- Calculate "Sales Velocity" (Days to Close) to improve quarterly forecasting.
- Segment Sales Agents by performance to optimize lead allocation.

The Solution:

I engineered an end-to-end Power BI Dashboard to audit the sales lifecycle, utilizing a raw dataset of 8,000+ CRM opportunities.

- Data Engineering (Excel): Created custom logic to calculate Time To Close (Close Date - Engage Date) and Win Flag binary indicators, enabling precise time-series analysis.
- Pipeline Analysis: Developed a "Funnel Visualization" that revealed the conversion rates between Prospecting → Engaging → Closing.
- Performance Matrix: Built a Scatter Plot (Revenue vs. Win Rate) to segment sales agents into "Top Performers" and "Coachable" cohorts.

Key Insights and Strategic Recommendations:

Insight 1: Pipeline Maturity Risk

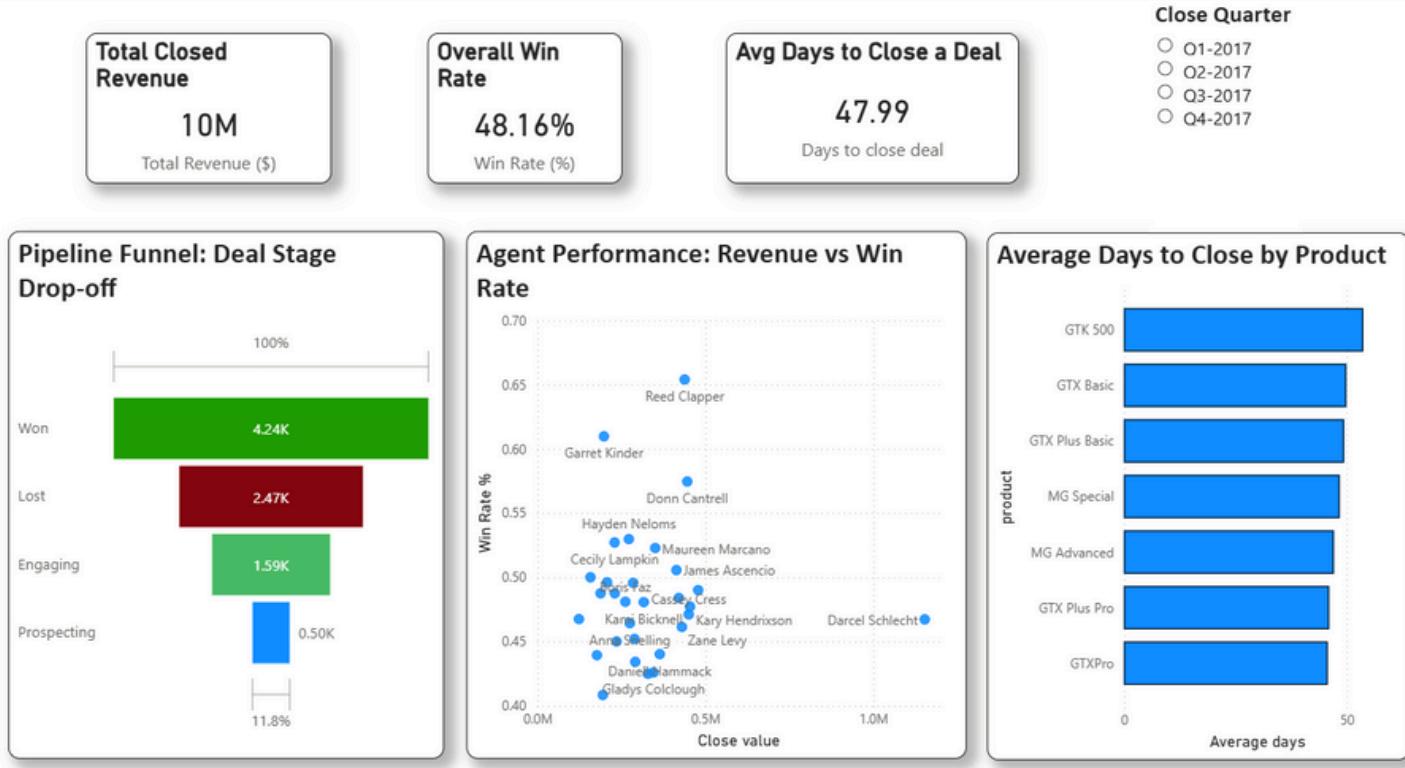
- *Finding:* The "Pipeline Funnel" shows a heavy concentration of closed deals (Won: 4.24K), but a worryingly low volume of new opportunities in the 'Prospecting' stage (0.50K).
- *Recommendation:* Immediate focus must shift to Top-of-Funnel lead generation. The current pipeline is "emptying out," and without new leads, Q3 revenue will likely dip.

Insight 2: Product Velocity Mismatch

- *Finding:* Contrary to expectations, the "Sales Cycle" is remarkably consistent across all products, clustering tightly between 45-55 days.
- *Recommendation:* Since product complexity is not slowing sales, the team can confidently scale the GTK 500 (highest-volume product) without fearing operational bottlenecks.

Insight 3: Sales Talent Optimization

- *Finding:* The Scatter Plot reveals two specific agents, Reed Clapper and Garret Kinder, who maintain exceptional Win Rates (>60%) but have low total revenue.
- *Recommendation:* These agents are under-utilized. Assigning them high-value "Enterprise" leads from lower-performing agents could increase total revenue without hiring new staff.



Final Deliverable: Interactive B2B Sales Performance Dashboard.

| | A | B | C | D | E | F | G | H | I | J | K |
|----|----------------|-------------------|----------------|------------------------------|------------|-------------|------------|-------------|---------------|----------|---------------|
| 1 | opportunity_id | sales_agent | product | account | deal_stage | engage_date | close_date | close_value | Days_To_Close | Win_Flag | Close_Quarter |
| 2 | 1C1I7A6R | Moses Frase | GTx Plus Basic | Cancity | Won | 10/20/2016 | 3/1/2017 | 1054 | 132 | 1 | Q1-2017 |
| 3 | Z0630YW0 | Darcel Schlecht | GTxPro | Isdom | Won | 10/25/2016 | 3/11/2017 | 4514 | 137 | 1 | Q1-2017 |
| 4 | EC4QE1BX | Darcel Schlecht | MG Special | Cancity | Won | 10/25/2016 | 3/7/2017 | 50 | 133 | 1 | Q1-2017 |
| 5 | MV1LWRNH | Moses Frase | GTx Basic | Codehow | Won | 10/25/2016 | 3/9/2017 | 588 | 135 | 1 | Q1-2017 |
| 6 | PE84CX4O | Zane Levy | GTx Basic | Hattan | Won | 10/25/2016 | 3/2/2017 | 517 | 128 | 1 | Q1-2017 |
| 7 | ZNBS69V1 | Anna Snelling | MG Special | Ron-tech | Won | 10/29/2016 | 3/1/2017 | 49 | 123 | 1 | Q1-2017 |
| 8 | 9ME3374G | Vicki Laflamme | MG Special | J-Texon | Won | 10/30/2016 | 3/2/2017 | 57 | 123 | 1 | Q1-2017 |
| 9 | 7GN8Q4LL | Markita Hansen | GTx Basic | Cheers | Won | 11/1/2016 | 3/7/2017 | 601 | 126 | 1 | Q1-2017 |
| 10 | OLK9LKZB | Niesha Huffines | GTx Plus Basic | Zungoity | Won | 11/1/2016 | 3/3/2017 | 1026 | 122 | 1 | Q1-2017 |
| 11 | HAXMC4IX | James Ascencio | MG Advanced | Engaging | 11/3/2016 | | | | | 0 | |
| 12 | NL3JZH1Z | Anna Snelling | MG Special | Bioholding | Won | 11/4/2016 | 3/10/2017 | 53 | 126 | 1 | Q1-2017 |
| 13 | KWVA7VR1 | Gladys Colclough | GTxPro | Genco Pura Olive Oil Company | Lost | 11/4/2016 | 3/18/2017 | 0 | 134 | 0 | Q1-2017 |
| 14 | S8DX3XOU | James Ascencio | GTx Plus Pro | Sunnamplex | Won | 11/4/2016 | 3/10/2017 | 5169 | 126 | 1 | Q1-2017 |
| 15 | ENB2XD8G | Maureen Marcano | GTx Plus Pro | Sonor | Won | 11/4/2016 | 3/6/2017 | 4631 | 122 | 1 | Q1-2017 |
| 16 | 09YE9QOV | Hayden Neloms | MG Advanced | Finjob | Won | 11/5/2016 | 3/11/2017 | 3393 | 126 | 1 | Q1-2017 |
| 17 | 3F5MZNEH | Rosalina Dieter | MG Special | Sonor | Lost | 11/5/2016 | 3/3/2017 | 0 | 118 | 0 | Q1-2017 |
| 18 | M6WEJXC0 | Rosalina Dieter | MG Advanced | Scotfind | Won | 11/5/2016 | 3/6/2017 | 3284 | 121 | 1 | Q1-2017 |
| 19 | 6PTR7VBR | Versie Hillebrand | MG Special | Treequote | Won | 11/6/2016 | 3/5/2017 | 61 | 119 | 1 | Q1-2017 |
| 20 | 902REDPA | Daniell Hammack | GTxPro | Xx-zobam | Lost | 11/7/2016 | 3/9/2017 | 0 | 122 | 0 | Q1-2017 |

SQL query performing data cleaning and RFM calculation.