

# 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.

Total Closed Revenue

10M

Total Revenue (\$)

Overall Win Rate

48.16%

Win Rate (%)

Avg Days to Close a Deal

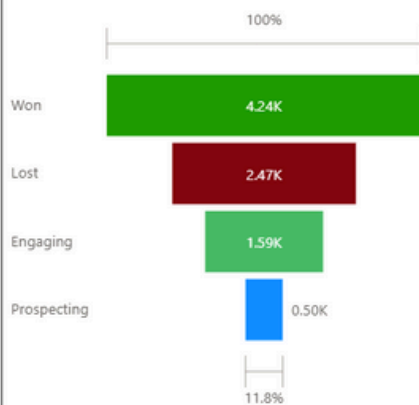
47.99

Days to close deal

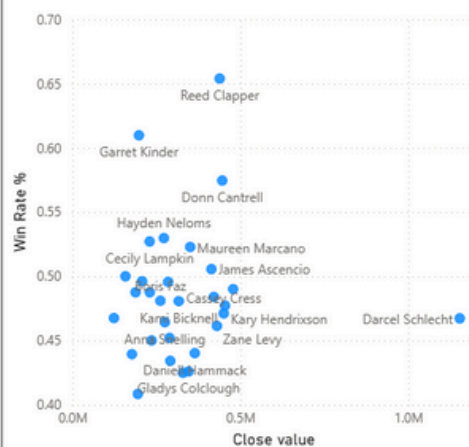
Close Quarter

- Q1-2017
- Q2-2017
- Q3-2017
- Q4-2017

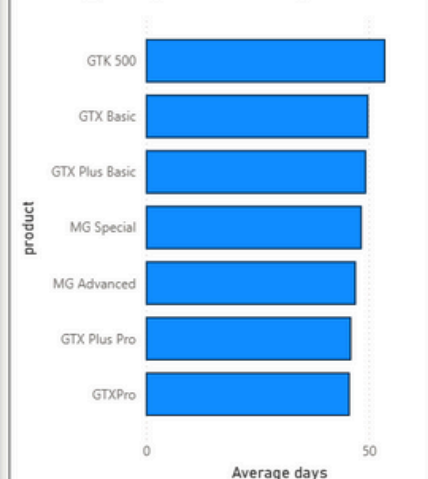
### Pipeline Funnel: Deal Stage Drop-off



### Agent Performance: Revenue vs Win Rate



### Average Days to Close by Product



Final Deliverable: Interactive B2B Sales Performance Dashboard.

	A	B	C	D	E	F	G	H	I	J	K
	opportunity_id	sales_agent	product	account	deal_stage	engage_date	close_date	close_value	Days_To_Close	Win_Flag	Close_Quarter
1	1C1I7A6R	Moses Frase	GTX Plus Basic	Cancity	Won	10/20/2016	3/1/2017	1054	132	1	Q1-2017
2	Z063OYW0	Darcel Schlecht	GTXPro	Isdom	Won	10/25/2016	3/11/2017	4514	137	1	Q1-2017
3	EC4QE1BX	Darcel Schlecht	MG Special	Cancity	Won	10/25/2016	3/7/2017	50	133	1	Q1-2017
4	MV1LWRNH	Moses Frase	GTX Basic	Codehow	Won	10/25/2016	3/9/2017	588	135	1	Q1-2017
5	PE84CX40	Zane Levy	GTX Basic	Hatfan	Won	10/25/2016	3/2/2017	517	128	1	Q1-2017
6	ZNBS69V1	Anna Snelling	MG Special	Ron-tech	Won	10/29/2016	3/1/2017	49	123	1	Q1-2017
7	9ME3374G	Vicki Laflamme	MG Special	J-Texon	Won	10/30/2016	3/2/2017	57	123	1	Q1-2017
8	7GN8Q4LL	Markita Hansen	GTX Basic	Cheers	Won	11/1/2016	3/7/2017	601	126	1	Q1-2017
9	OLK9LKZB	Niesha Huffines	GTX Plus Basic	Zumgoity	Won	11/1/2016	3/3/2017	1026	122	1	Q1-2017
10	HAXMC4IX	James Ascencio	MG Advanced		Engaging	11/3/2016				0	
11	NL3JZH1Z	Anna Snelling	MG Special	Bioholding	Won	11/4/2016	3/10/2017	53	126	1	Q1-2017
12	KWVA7VR1	Gladys Colclough	GTXPro	Genco Pura Olive Oil Company	Lost	11/4/2016	3/18/2017	0	134	0	Q1-2017
13	S8DX3XOU	James Ascencio	GTX Plus Pro	Sunnamplex	Won	11/4/2016	3/10/2017	5169	126	1	Q1-2017
14	ENB2XD8G	Maureen Marciano	GTX Plus Pro	Sonron	Won	11/4/2016	3/6/2017	4631	122	1	Q1-2017
15	09YE9QOV	Hayden Neloms	MG Advanced	Finjob	Won	11/5/2016	3/11/2017	3393	126	1	Q1-2017
16	3F5MZNEH	Rosalina Dieter	MG Special	Sonron	Lost	11/5/2016	3/3/2017	0	118	0	Q1-2017
17	M6WEJXC0	Rosalina Dieter	MG Advanced	Scotfind	Won	11/5/2016	3/6/2017	3284	121	1	Q1-2017
18	6PTR7VBR	Versie Hillebrand	MG Special	Treequote	Won	11/6/2016	3/5/2017	61	119	1	Q1-2017
19	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.