

## CRM Sales Analysis Report

### 1. Project Overview

This report provides an in-depth analysis of sales and accounts data using Power BI. The primary objective is to extract key insights related to revenue distribution, sales performance, and product trends. By leveraging interactive visualizations, this analysis aims to assist in better business decision-making.

### 2. Extracted Key Metrics

The following key metrics were extracted from the dataset:

- Total Industries: 10 industry.
- Total Companies: 85 company.
- Total Employees: 396K employee across companies.
- Total Revenue: 169.5k \$.
- Total Sales Agents: 30 agent.
- Total Sales Teams: 6 sales teams across regional offices.
- Total Products: 7 products available.
- Total Close Values: 10M \$.

### 3. Data Visualizations & Insights

The following visualizations were created to analyze trends and performance:

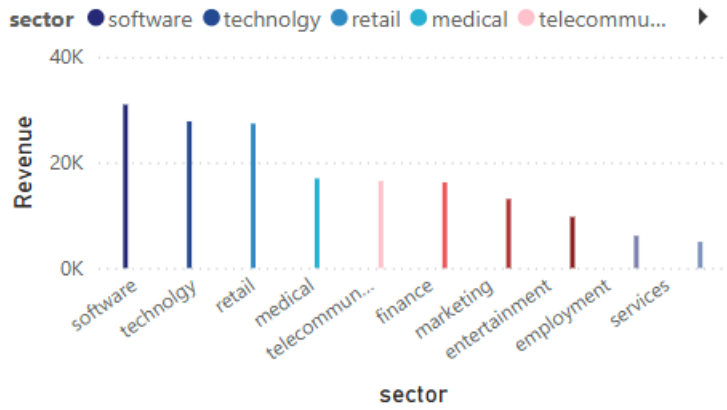
- Average Close Values by Company:



- The highest company is "Cheers".
- The lowest company is "Hottechi".

- Revenue Distribution by Industry:

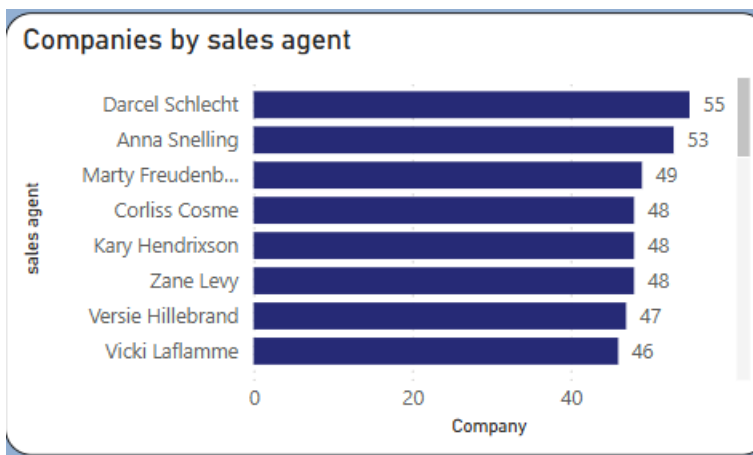
#### Total revenue by sector



The top 5 industries make revenues:

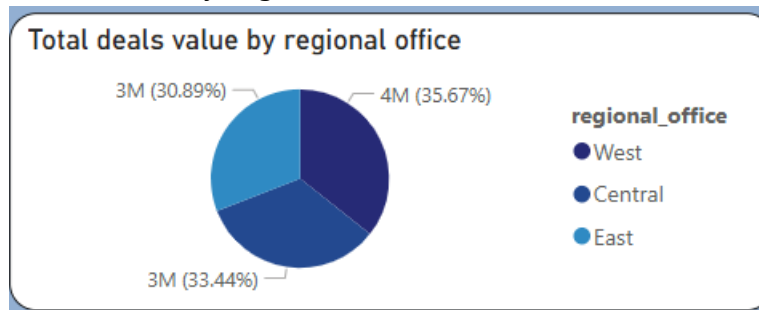
1. Software
2. Technology
3. Retail
4. Medical
5. telecommunications

- Companies per Sales Agent:



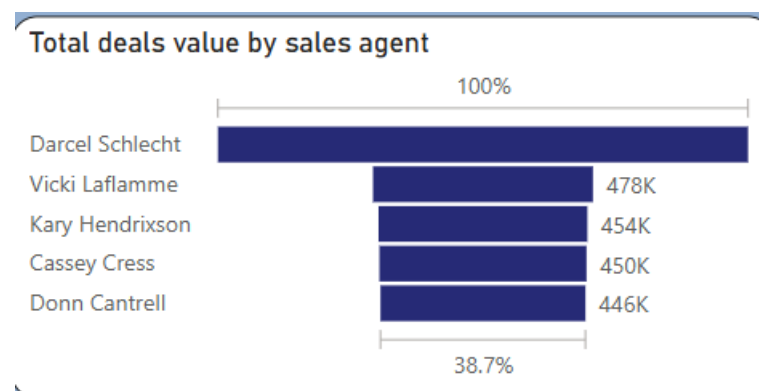
- The biggest number of companies is handled by “Darcel Schlecht”

- Close Values by Regional Office:



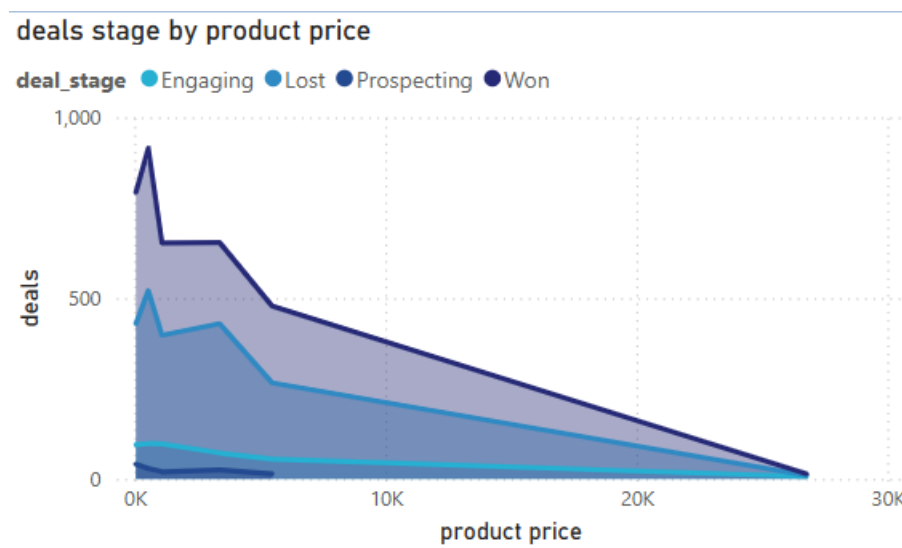
- The office location doesn't affect on the deals value

- Close Values by Sales Agents:



- There is the top 5 sales agents make deals value

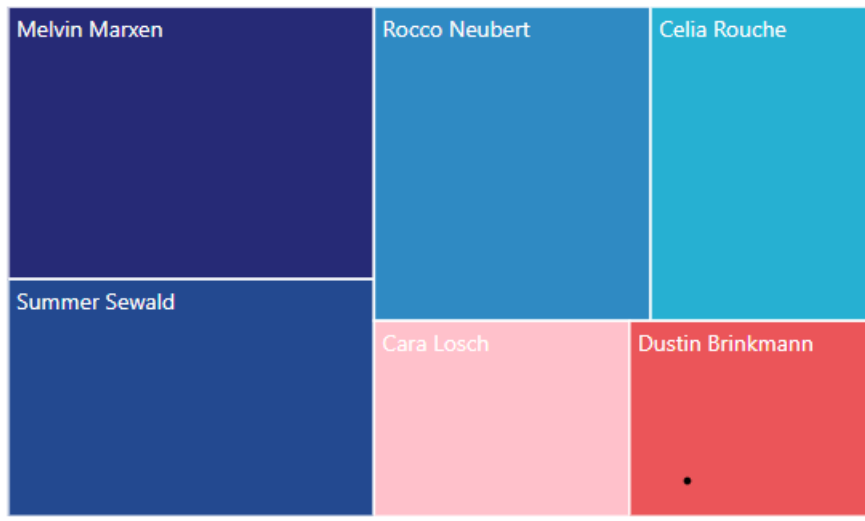
- Opportunities by Sales Price and Deal Stage:



- The highest the price the lowest chance to win the deal

- Close Values by Sales Manager:

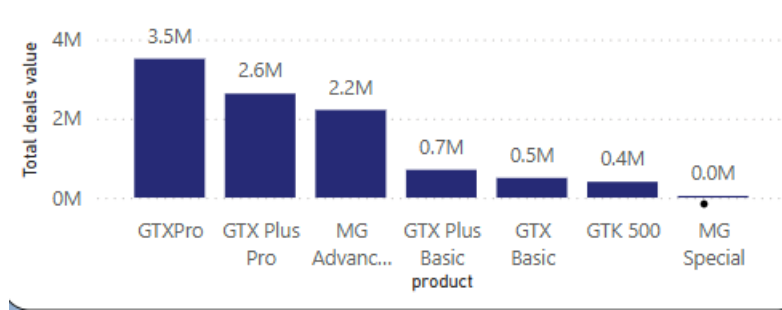
Total deals value by sales manager



- “Melvin Marxen” team is the most team makes revenues

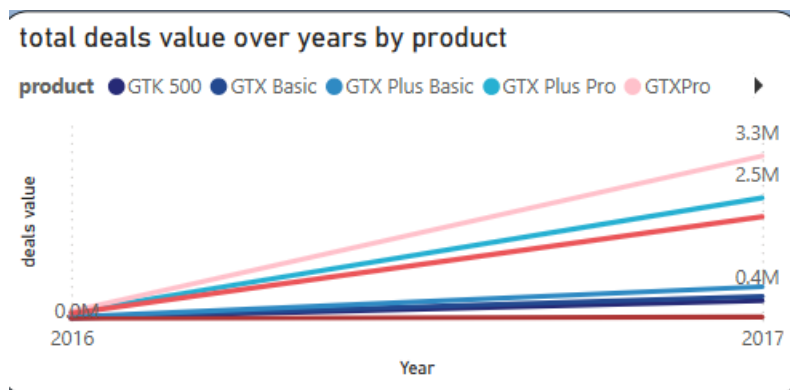
- Close Values by Product:

total deals value by product



- “GTXPro” is the best product they have

- Close Values by Product Over Years:



- All products have improved from 2016 to 2017

- Close Values by Product and Industry:



- It shows how different industries purchase various products
- For example :retail company purchases GTX Basic most

#### 4. Tools Used

Power BI was used for data visualization and analysis.

The dataset was provided in CSV format, and relationships between tables were established within Power BI.