NIKESH PUROHIT | DATA ANALYST ASPIRANT

CRM Business Performance Dashboard – A Zoho CRM Case Study

Data-driven analysis of churn, revenue, and feature usage using SQL + Zoho Analytics

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About Project

To analyze customer behavior, churn patterns, revenue trends, and feature usage in a simulated CRM SaaS business — and provide actionable insights using SQL and Zoho Analytics.

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Problem Statement

Zoho’s CRM product team wants to understand:

- Why customer churn is increasing
- What’s affecting user retention
- Which features are working well
- Which countries/industries perform better \or worse”

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Tools & Data Sources

- Data Cleaning

- SQL Analysis

- Dashboard Visualization

📁 Data:

- 500+ Customers
- 1000+ Sales Records
- 1500+ Feature Usage Logs

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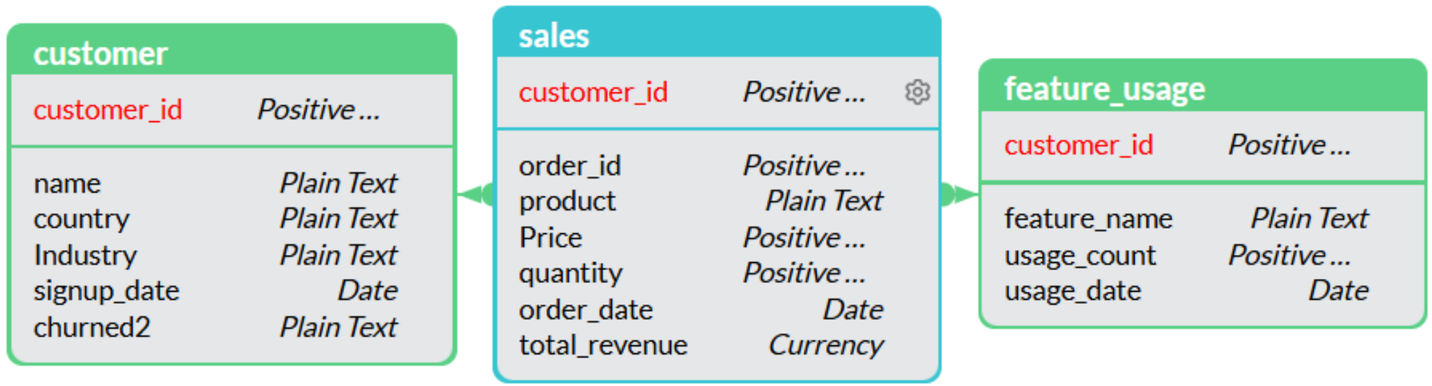
Model Diagram Overview



- customer_id is the primary key in the customer table

It is linked as a foreign key in both sales and feature_usage

This allows analysis across customers, purchases, and feature behavior

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Dashboard

CRM Business Performance Dashboards
A complete analysis

Filters

signup_date: All

churned: All

country: - Select -

Industry: - Select -

CRM Business Performance Dashboard

Total customer_id in Jun 2025

3.30K ↓

May 2025: 3.83K

% of Difference From

13.74% ↓

Average of customer_id

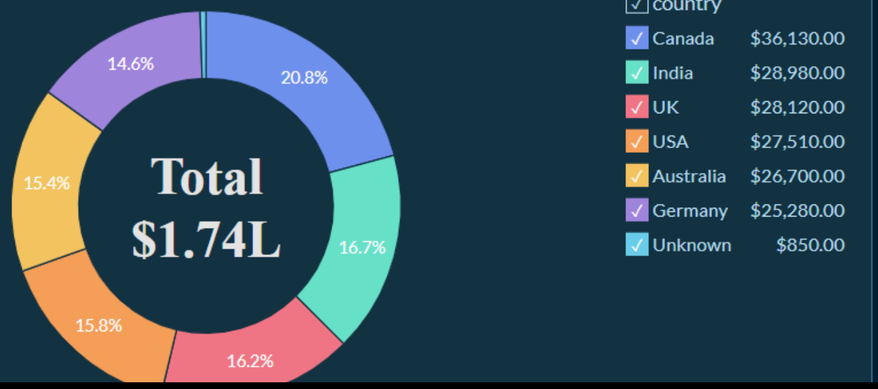
250.50

churned2 with MAX customer_id(N)

66.09K

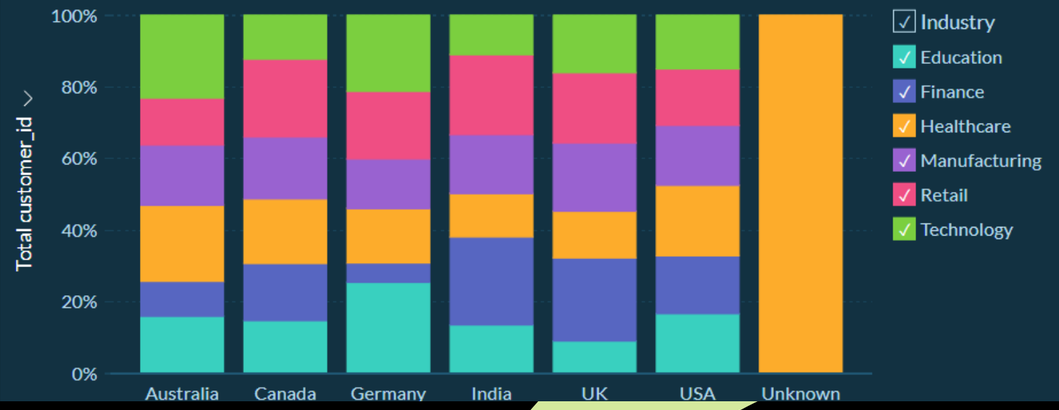
churned2 wise average customer_id: 62.63K

Revenue by Country



country	
Canada	$36,130.00
India	$28,980.00
UK	$28,120.00
USA	$27,510.00
Australia	$26,700.00
Germany	$25,280.00
Unknown	$850.00

Ratio of country-wise customer_id by Industry



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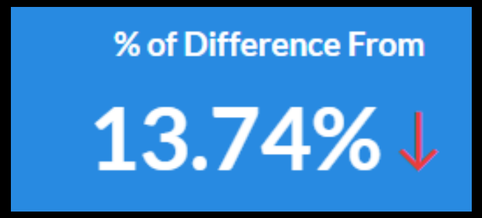
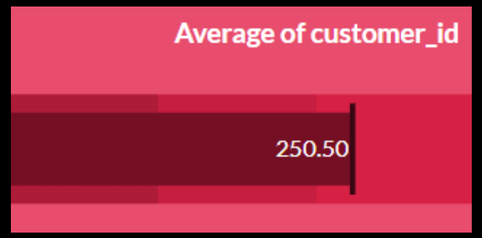
KPI SECTION

THE TOTAL NUMBER OF ACTIVE CUSTOMERS IN JUNE; DECREASED FROM 3.83K IN MAY



INDICATES CUSTOMER BASE DROPPED BY NEARLY 14% IN ONE MONTH — POSSIBLE CHURN ISSUE



MEAN CUSTOMER ID VALUE (CAN REFLECT NEW VS. OLD CUSTOMER TRENDS)

HIGHEST CHURNED CUSTOMER ID NUMBER — USEFUL IN TRACING HIGH-RISK USER RANGE

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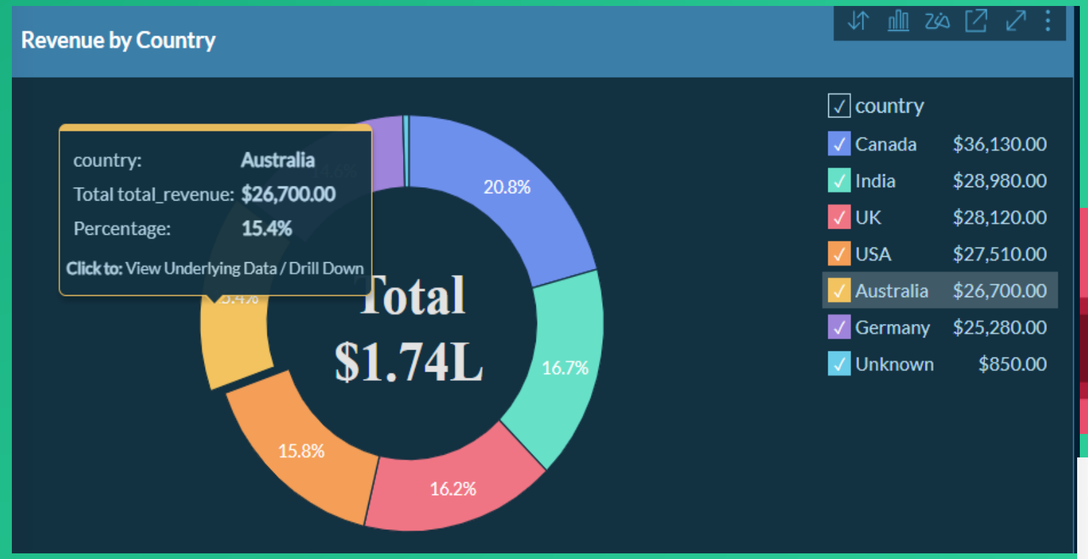
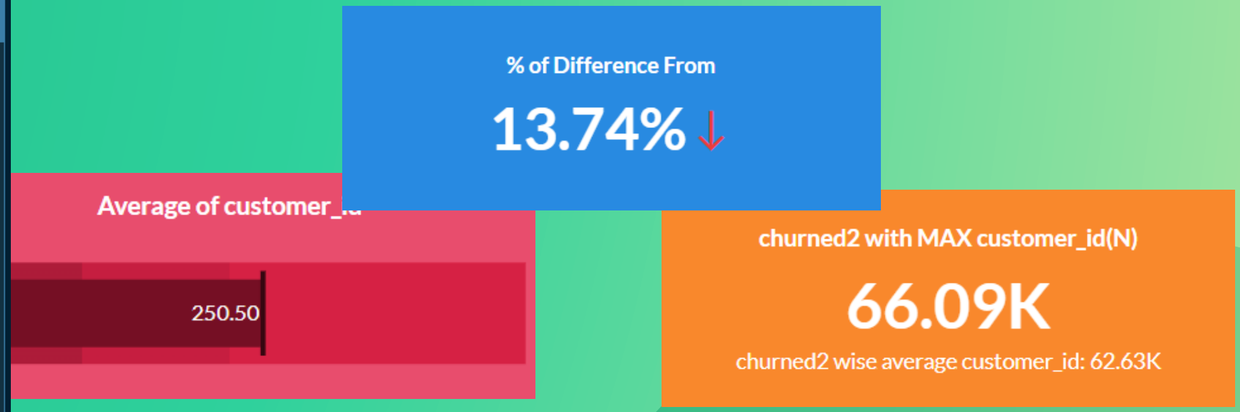
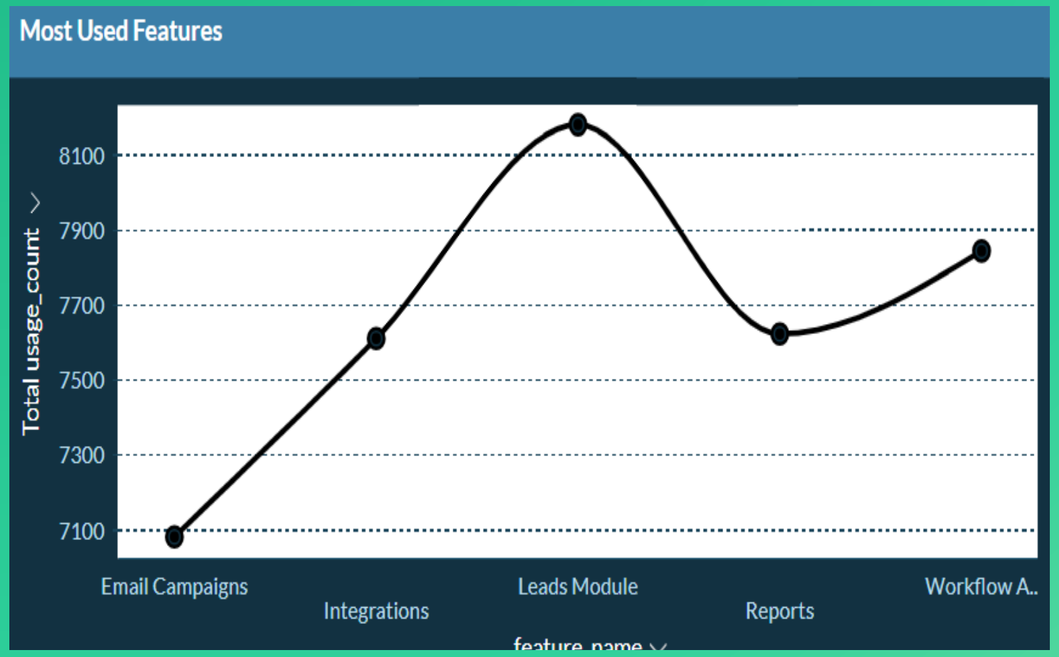
CHART REPORTS







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Recommended Actions

ISSUE	ACTION
HIGH CHURN	LAUNCH RE-ENGAGEMENT EMAILS
LOW FEATURE ADOPTION	PUSH TUTORIALS & EARLY ONBOARDING NUDGES
INDUSTRY-BASED CHURN	CUSTOMIZE FLOWS BY SEGMENT
RETENTION DIP POST-FEB	CHECK IF PRICING/FEATURES CHANGED IN MARCH

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Business Value to Zoho Stakeholders

HELPS CUSTOMER SUCCESS TEAMS REDUCE CHURN

GUIDES PRODUCT TEAMS ON WHAT FEATURES TO IMPROVE

AIDS MARKETING IN TARGETING LOW-RETENTION INDUSTRIES

INFORMS LEADERSHIP ABOUT MARKET DROP-OFF POINTS

THANK YOU