



XYZ LIMITED

SALES PERFORMANCE ANALYSIS

Goal: To derive actionable insights that help XYZ Financial Services make data-driven decisions regarding agent performance, customer behavior, and call strategy.



ANALYSIS BY: JULIET OFOEGBU



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COMPANY BACKGROUND

XYZ Limited specializes in offering tailored financial products. The sales team makes outbound calls to customers, introducing them to new financial products and services.

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INSIGHTS FOR STAKEHOLDERS 1

Agent Insights:

- Top-performing agents (e.g., agents with the highest total sales and conversion rates)
- Agents with low performance requiring training
- Conversion and pickup rates per agent



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INSIGHTS FOR STAKEHOLDERS 2

Customer Insights:

- High-value customers (customers purchasing the most products)
- Average pickup rates to assess customer engagement to offer them an incentive for continuous patronage and retention



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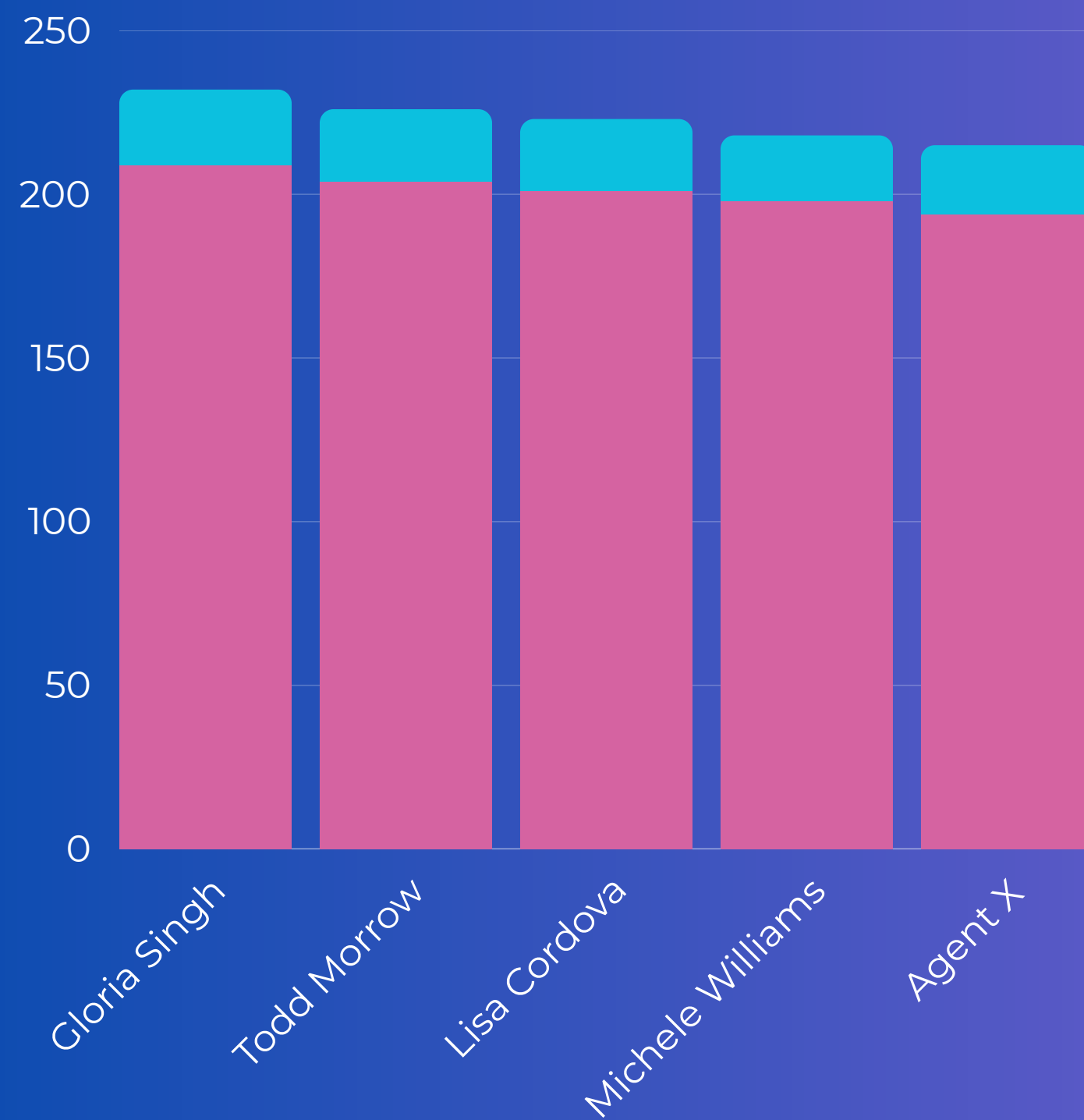
INSIGHTS FOR STAKEHOLDERS 3

Call Insights:

- Overall call success rate
- Average call durations for sales conversions for each agent
- Total calls made and pick up rate for calls made



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TOP PERFRORMING AGENTS

This chart shows an analysis of the top 5 performing agents in XYZ Financial Company based on the total number of products each sold during the given period. It also shows the conversion rate for the top these agents.



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TOP 3 HIGH-PERFORMING AGENTS

2

Todd Morrow

Total products sold were 204. Todd's pickup rate was 69. And had a conversion rate of 22

1

Gloria Singh

Total products sold were 209. Gloria's pickup rate was 71. And had a conversion rate of 23

3

Lisa Cordova

Total products sold were 201. Lisa's pickup rate was 70. And had a conversion rate of 22



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TOP 3 LOW-PERFORMING AGENTS

2

Randy Moore

Total products sold were 177. Todd's pickup rate was 68. And had a conversion rate of 20

1

Angel Briggs

Total products sold were 157. Angel's pickup rate was 67. And had a conversion rate of 18

3

Dana Hardy

Total products sold were 182. Lisa's pickup rate was 65. And had a conversion rate of 21



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ANALYZING CUSTOMER BEHAVIOR

Our top 10 customers with the most purchases during the given time period include customers with ID: 399, 123, 769, 611, 43, 519, 150, 939, 609, and 642.

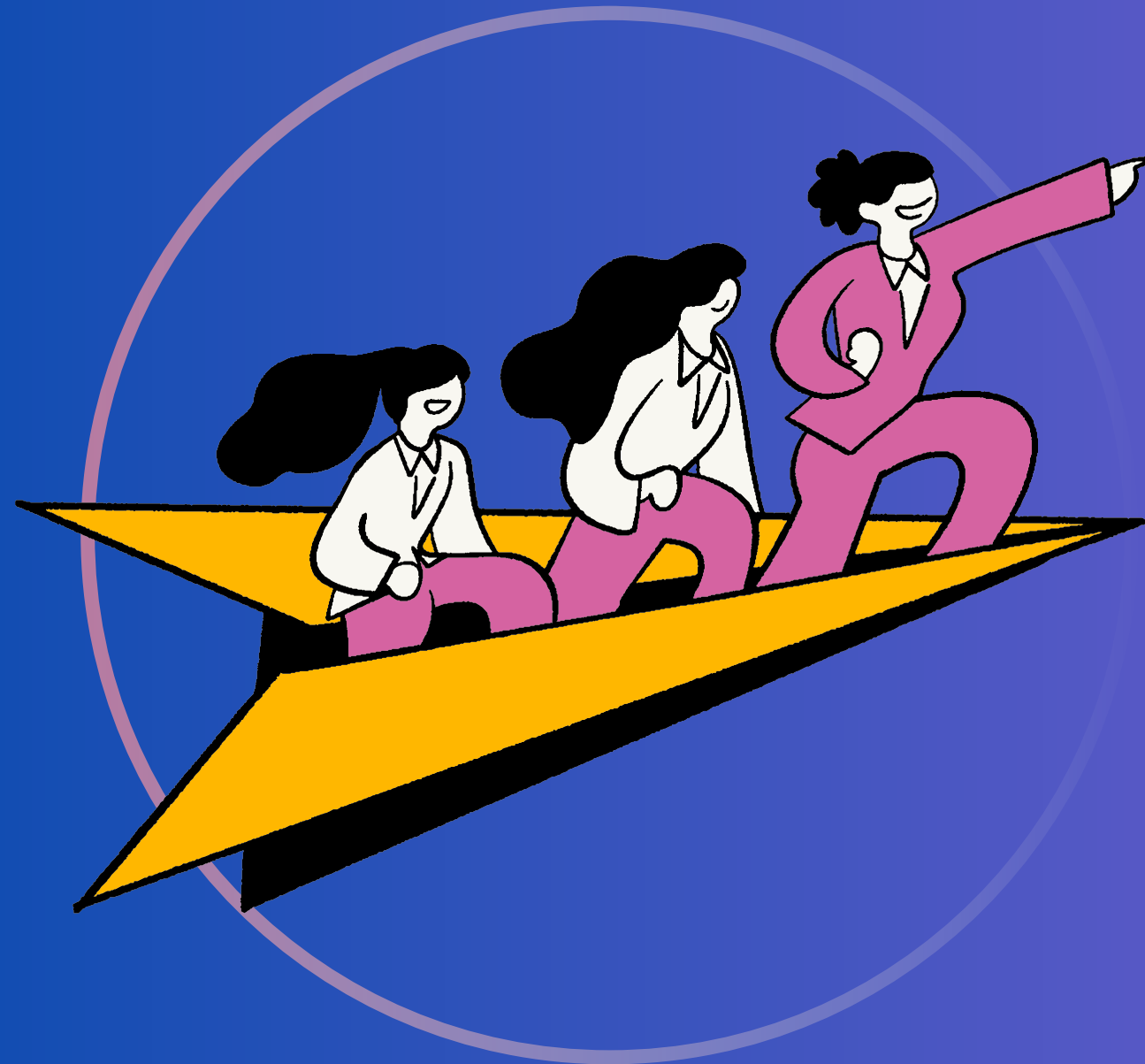
Customers were identified by their customer ID and not by name.

Suggestion: Reward our top customers with either discounts or bonuses for customer retention and loyalty.





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ACTIONABLE RECOMMENDATIONS

- Promote or reward agents with consistently high performance.
- Provide additional training to agents with low conversion rates.
- Optimize call durations to improve efficiency and conversion rates.



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THANK YOU!

DATA ANALYSIS IS KEY TO
BUSINESS GROWTH AND
SUCCESS!



MY LINKEDIN PROFILE: JULIET OFOEGBU X