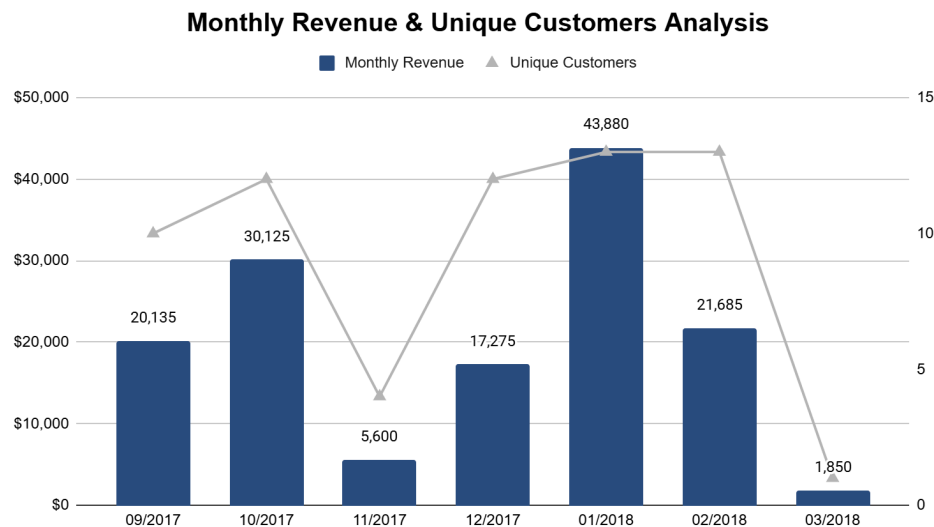


Analysis Report

1. Business Overview

The data reveals a clear seasonal trend in TuneWorks' revenue and customer engagement between September 2017 and March 2018. January 2018 achieved the highest monthly revenue, approximately \$43,880, likely driven by post-holiday events and increased demand for entertainment services. Strong performance was also observed in October 2017 (\$30,125) and February 2018 (\$21,685), reinforcing the presence of peak booking seasons in late Q4 and early Q1.

Conversely, November 2017 and March 2018 show notable declines in both revenue and customer activity. November's sharp dip to \$5,600 in revenue, despite a moderate number of bookings, may indicate weaker booking values, lower pricing strategies, or external market factors. The drop in March 2018 is interpreted cautiously, as data collection concludes at that point. It is unclear whether the decline reflects business operations or simply the absence of further recorded data.



Monthly unique customer counts closely track revenue trends, indicating that maintaining steady customer engagement directly impacts financial outcomes. Higher customer acquisition and retention during peak periods correlate strongly with higher revenues.

TuneWorks should capitalize on high-demand months through targeted marketing and premium packages, while implementing promotional offers and dynamic pricing during low-demand periods. Consistent data collection and monitoring will further validate these seasonal trends and support proactive planning for staffing, event logistics, and pricing strategies.

2. Agent Insights

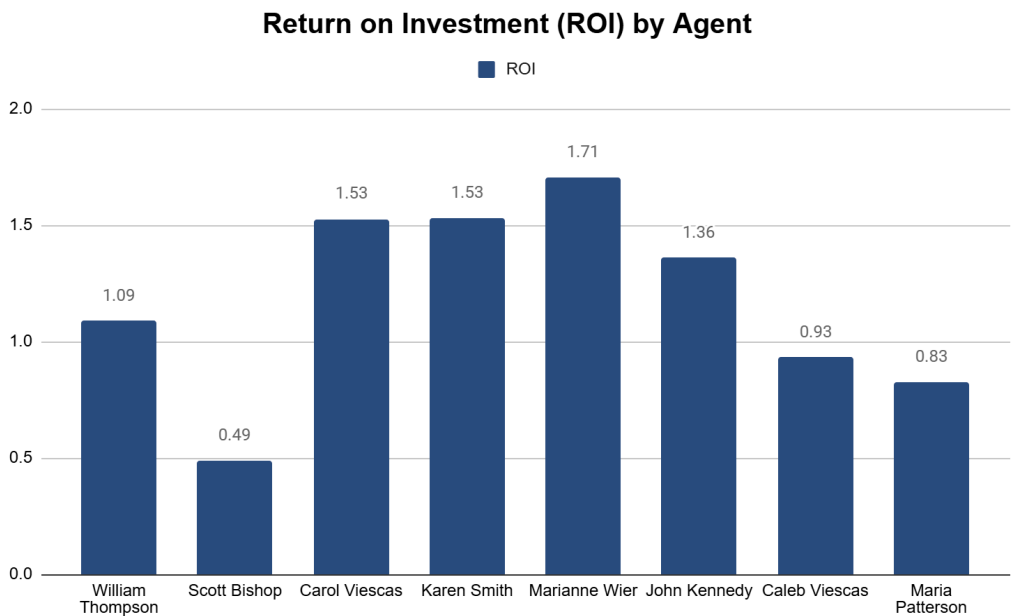
Methodology and Key Findings

Agent performance was assessed through a Return on Investment (ROI) framework, defined as:

$$ROI = \frac{Total\ Contract\ Revenue}{Semiannual\ Salary + Commission\ Earned}$$

An ROI greater than 1.0 indicates profitability, while an ROI below 1.0 signals that the agent’s cost exceeds the revenue generated.

Data were consolidated from salary, commission, and engagement records, filtered to include only contracts initiated within the last six months. ROI values were visualized through stacked bar charts showing salary and commission composition, alongside comparative ROI bars.



The analysis identified clear differences in performance across the team:

- **Underperforming Agents (ROI < 1.0):**
 - **Scott Bishop (0.49)** delivered the lowest ROI, generating less than half the revenue required to cover his compensation.
 - **Maria Patterson (0.83)** and **Caleb Viescas (0.93)** also fell below the profitability threshold.
 - Despite earning base salaries between \$11,000 and \$15,000, these agents failed to recover their costs through contract revenue.
- **High-Performing Agents (ROI > 1.0):**
 - **Marianne Wier (1.71)** achieved the strongest ROI, followed closely by **Karen Smith (1.53)**, **Carol Viescas (1.53)**, and **John Kennedy (1.36)**.
 - Each of these agents not only covered their compensation but delivered substantial net value to the company.

Further analysis shows that **most agent costs stem from base salary rather than commission**, and that higher commission rates alone do not guarantee improved performance.

Special Case – Daffy Dumbwit

Daffy Dumbwit appeared in HR and agent tables but not in recent engagement records. This absence may indicate that they are inactive, misclassified support staff, or a probationary employee without active bookings. Their status requires HR follow-up to confirm role and data accuracy.

Conclusion and Recommended Actions

Based on ROI results, **Scott Bishop**, **Caleb Viescas**, and **Maria Patterson** are operating at a net financial loss and should be considered for **reassignment or termination**. **Marianne Wier**, **Karen Smith**, and **John Kennedy** substantially exceeded expectations and should be **retained and rewarded** through recognition or performance-based incentives. **Daffy Dumbwit** requires a **data and HR audit** to verify their classification and ensure reporting accuracy. Implementing

these recommendations will enhance sales productivity, align compensation with performance, and strengthen TuneWorks' revenue management foundation.

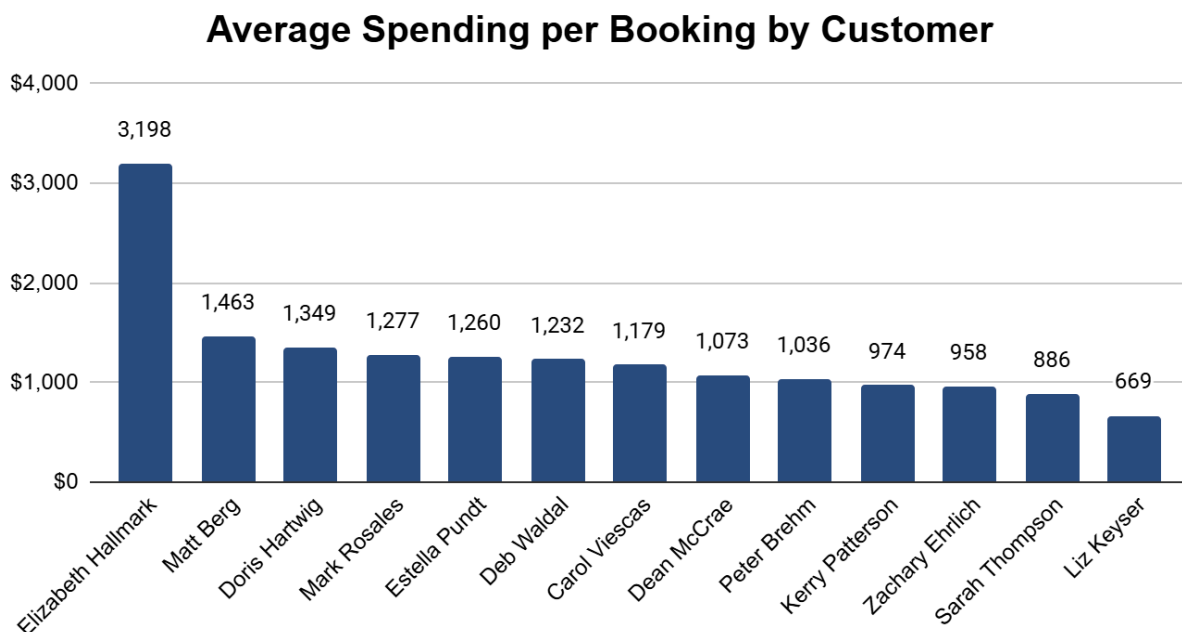
3. Customer Insights

Spending Behavior Analysis

Customer engagement analysis identified TuneWorks' most valuable clients based on **total revenue, booking frequency, and average spending per booking**. Customers were segmented into three groups:

Segment	Description	Characteristics
Top Loyalty	Highly engaged, high-value customers	>\$10,000 total spend; frequent bookings
High Potential	Moderate engagement with strong upselling potential	>\$1,000 average per booking; consistent usage
Re-Activation	Low-engagement customers requiring targeted retention	<\$1,000 average per booking; few bookings

Key Observations:



- **Elizabeth Hallmark** is the top customer, generating over **\$25,000** in total revenue - more than twice any other client.
- **Estella Pundt**, despite low booking frequency, ranks among the top five in **average spend per booking**, indicating premium purchasing behavior.
- **Zachary Ehrlich** made the **most bookings (13)** but has one of the **lowest average spend levels**, suggesting potential for pricing or upselling adjustments.

Overall, the customer base is **highly revenue-skewed**, with a small number of clients contributing the majority of income. This concentration underscores the importance of maintaining relationships with high-value customers while nurturing growth among emerging segments.

Strategic Implications

To improve revenue stability and customer lifetime value, TuneWorks should pursue a **three-tiered strategy**:

1. **Top-Loyalty Clients:** Establish a **VIP loyalty program** offering exclusive benefits such as early booking access, premium content, and dedicated support to strengthen retention.
2. **High-Potential Clients:** Target repeat users like **Deb Waldal**, **Dean McCrae**, and **Zachary Ehrlich** with **bundled packages** or premium-tier upgrades to encourage higher spending per booking.
3. **Re-Activation Segment:** Re-engage inactive or low-frequency customers (e.g., **Sarah Thompson**, **Liz Keyser**) through **personalized outreach, discounts, and satisfaction surveys** to reduce churn and rebuild loyalty.

Segmented engagement strategies will help TuneWorks reduce revenue volatility, improve retention, and create a more resilient customer base.

4. Inactive Customers and Cross-Selling Opportunities

Further analysis identified customers who (a) have not booked events within the **top three musical styles**, (b) have not booked at all during the period, (c) booked the most expensive engagements, or (d) whose musical preferences do not align with their bookings.

Inactive Customers

Customer ID	Name
10008	Darren Gehring
10011	Joyce Bonnicksen

Top 3 Musical Styles

Music Style Name	Total Bookings
60's Music	25
Country	23
Contemporary	22

Customers Who Haven't Booked All Top 3 Musical Styles

Customer ID	Customer Name
10008	Darren Gehring
10011	Joyce Bonnicksen
10015	Carol Viescas
10013	Estella Pundt
10003	Peter Brehm
10009	Sarah

Findings:

- Two customers made **no bookings** within the analyzed timeframe.
- Several customers display **mismatched preferences**, booking outside their indicated favorite genres.
- **Elizabeth Hallmark** booked the **most expensive engagement (\$14,105)**, significantly exceeding all others.

Business Implications:

TuneWorks can leverage these findings to strengthen **cross-selling and reactivation**:

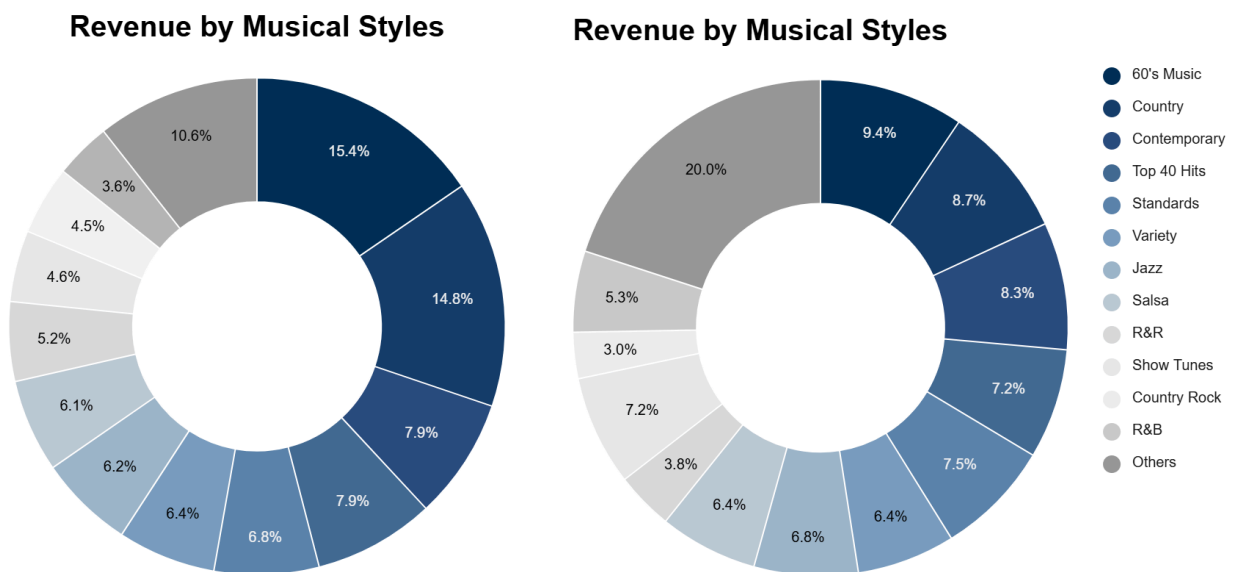
- **Focus on Top 3 Styles (60's Music, Country, Contemporary):** Target customers who have not booked in these high-performing genres with personalized campaigns emphasizing popularity and exclusivity.
- **Offer Bundled or Discounted Packages:** Introduce **first-time booking incentives** and **multi-style event bundles** to attract inactive customers and expand engagement breadth.
- **Reactivation Campaigns:** Reach out to **2017-only customers** with VIP invitations or limited-time offers to restore activity.

TuneWorks should also implement **segmented marketing automation**, using customer preferences, history, and engagement levels to personalize communication. Tracking conversion rates and customer feedback will help continuously refine these marketing initiatives.

5. Entertainer Insights

Revenue and Bookings by Musical Style

Linking engagement data with entertainer metadata reveals that the **top nine musical styles** account for **71% of total revenue**, led by:



These genres dominate TuneWorks' financial performance, reflecting strong audience preferences and reliable revenue streams. The remaining **11 styles collectively contribute 29%**, highlighting a long-tail of niche demand that supports portfolio diversity.

Strategic Implications:

Top-performing genres should be prioritized in **talent acquisition, scheduling, and marketing**, ensuring sufficient entertainer availability during high-demand seasons. Meanwhile, niche styles such as **Classic Rock & Roll, Show Tunes, and Country Rock** should be maintained strategically for diversification, while **underperforming genres** (e.g., Salsa, Variety) should undergo periodic review for repositioning, repricing, or removal.

Entertainer Performance Analysis

Aggregating bookings and contract revenue by entertainer shows **Country Feeling** as the leading act in both volume (15+ bookings) and revenue. **JV & the Deep Six, Caroline Coie Quartet, and Coldwater Cattle Company** delivered moderate booking counts but high average contract prices, suggesting premium appeal. In contrast, **Jazz Persuasion, Julia Schmebly, and Susan McLain** recorded both low bookings and low revenue, signaling either limited market fit or underpromotion.

Recommendations:

- **Promote and retain high-performing acts** like *Country Feeling* and *JV & the Deep Six* through premium scheduling, bonuses, and increased visibility.
- **Develop mid-tier entertainers** with strong revenue per booking via targeted marketing or strategic collaborations.

- **Reassess underperforming acts** for redeployment or removal to optimize resource allocation and improve overall profitability.

6. Summary and Strategic Outlook

TuneWorks' data provides clear insights into seasonal demand patterns, agent productivity, customer segmentation, and entertainer performance. Implementing **data-driven decisions across these areas** will improve operational efficiency and financial outcomes.

Key priorities moving forward include:

- Leveraging **peak-season insights** for revenue forecasting and resource planning.
- **Optimizing the sales team** by aligning compensation with measurable ROI.
- Building **customer loyalty programs** and personalized reactivation campaigns.
- Focusing **marketing and talent investments** on top-performing genres and entertainers.

Collectively, these actions will enhance TuneWorks' revenue management capabilities and strengthen its long-term growth strategy.

Technical Appendix

1. CORE ANALYSIS – AGENTS

-- Agents ranked by total “revenue handle” (sum of contractprice on their engagements)

-- Note: This is NOT platform net revenue unless platform fee is a column.

	123 agentid	A-z agent_name	123 engagements_hand	123 total_contractprice	123 commissionrate	123 salary	123 comp_cost_estimat
1	9	Daffy Dumbwit	0	[NULL]	0.01	50	[NULL]
2	3	Carol Viescas	19	24,800	0.05	30,000	31,240.0000184774
3	6	John Kennedy	12	24,435	0.06	33,000	34,466.0999672301
4	5	Marianne Wier	18	22,635	0.045	24,500	25,518.5750404745
5	1	William Thompson	16	19,895	0.04	35,000	35,795.7999822125
6	4	Karen Smith	17	18,595	0.055	22,000	23,022.7249944583
7	8	Maria Patterson	15	12,825	0.04	30,000	30,512.9999885336
8	7	Caleb Viescas	8	10,645	0.035	22,100	22,472.5750015862
9	2	Scott Bishop	6	6,720	0.04	27,000	27,268.7999939918

-- Six-month ROI view (semi-annual)

	123 agentid	123 semi_annual_salary	123 commission_earned	123 total_contractprice	123 roi
1	5	12,250	1,018.5750404745	22,635	1.7059103883
2	4	11,000	1,011.7249945179	18,395	1.5314203421
3	3	15,000	1,240.0000184774	24,800	1.5270935943
4	6	16,500	1,466.0999672301	24,435	1.3600614515
5	1	17,500	795.7999822125	19,895	1.0874080401
6	7	11,050	372.5750015862	10,645	0.93192647
7	8	15,000	512.9999885336	12,825	0.8267259724
8	2	13,500	268.7999939919	6,720	0.4880599619

2. CORE ANALYSIS – MUSICAL STYLES

-- Style revenue + engagement count

	A-z stylename	123 num_engagements	123 avg_contractprice	123 total_revenue
1	Country	23	2,128.4782608696	48,955
2	60's Music	25	2,049.2	51,230
3	Country Rock	8	1,859.375	14,875
4	Classic Rock & Roll	10	1,715	17,150
5	Top 40 Hits	19	1,376.3157894737	26,150
6	70's Music	9	1,283.3333333333	11,550
7	Variety	17	1,248.2352941176	21,220
8	Contemporary	22	1,188.6363636364	26,150
9	Salsa	17	1,181.1764705882	20,080
10	Jazz	18	1,141.6666666667	20,550

-- Top 3 styles by total revenue (CTE used later)

	123 styleid	A-z stylename	123 total_revenue
1	3	60's Music	51,230
2	6	Country	48,955
3	10	Contemporary	26,150

3. MONTHLY TRENDING (USING CALENDAR DIM)

-- Revenue/Bookings by ztblMonths (assumes MonthStart/MonthEnd, MonthYear, YearNumber, MonthNumber exist)

	A-Z monthyear	123 monthly_revenue	123 unique_customers	123 total_bookings
1	September 2017	20,135	10	16
2	October 2017	30,125	12	22
3	November 2017	5,600	4	7
4	December 2017	17,275	12	17
5	January 2018	43,880	13	28
6	February 2018	21,685	13	20
7	March 2018	1,850	1	1

4. CUSTOMERS – VALUE & BEHAVIOR

-- Customer revenue + hours + AOV and \$/hr

-- Assumes starttime/ stoptime exist as time; if not, replace duration logic.

	123 customerid	A-Z customer_name	123 engagement_count	123 total_hours	123 total_contractprice	123 avg_spend_per_engagement	123 avg_spend_per_hour
1	10,005	Elizabeth Hallmark	8	1,553	25,585	3,198.13	16.47
2	10,006	Matt Berg	9	1,044	13,170	1,463.33	12.61
3	10,001	Doris Hartwig	8	968	10,795	1,349.38	11.15
4	10,014	Mark Rosales	10	1,289	12,770	1,277	9.91
5	10,013	Estella Pundt	6	793	7,560	1,260	9.53
6	10,002	Deb Waldal	10	1,000	12,320	1,232	12.32
7	10,015	Carol Viescas	7	869	8,255	1,179.29	9.5
8	10,004	Dean McCrae	11	1,503	11,800	1,072.73	7.85
9	10,003	Peter Brehm	7	653	7,250	1,035.71	11.1
10	10,012	Kerry Patterson	7	702	6,815	973.57	9.71

-- Inactive customers (never booked)

	123 customerid	A-Z custfirstname	A-Z custlastname
1	10,008	Darren	Gehring
2	10,011	Joyce	Bonnicksen

-- Top single-booking value per customer (max booking value)

	123 customerid	A-Z customer_name	123 max_booking_value
1	10,005	Elizabeth Hallmark	14,105
2	10,003	Peter Brehm	3,800
3	10,012	Kerry Patterson	2,930
4	10,001	Doris Hartwig	2,750
5	10,006	Matt Berg	2,675
6	10,004	Dean McCrae	2,570
7	10,002	Deb Waldal	2,450
8	10,013	Estella Pundt	2,300
9	10,014	Mark Rosales	2,300
10	10,015	Carol Viescas	2,210

5. PREFERENCES vs ACTUAL BOOKINGS

-- Top 3 styles by total revenue (for reuse)

	123 customerid ▼	A-Z custfirstname ▼	A-Z custlastname ▼	A-Z has_top3_preference ▼
1	10,008	Darren	Gehring	Yes
2	10,011	Joyce	Bonnicksen	No

-- Customers who have NOT booked any event in top 3 styles

	123 customerid ▼	A-Z custfirstname ▼	A-Z custlastname ▼	A-Z has_top3_preference ▼
1	10,008	Darren	Gehring	Yes
2	10,011	Joyce	Bonnicksen	No

-- Customers whose preferences don't match their bookings

	123 customerid ▼	A-Z customer_name ▼	A-Z stylename ▼
1	10,001	Doris Hartwig	Top 40 Hits
2	10,003	Peter Brehm	Motown
3	10,005	Elizabeth Hallmark	Chamber Music
4	10,007	Liz Keyser	70's Music
5	10,007	Liz Keyser	Classic Rock & Roll
6	10,007	Liz Keyser	Rhythm and Blues
7	10,008	Darren Gehring	Contemporary
8	10,008	Darren Gehring	Standards
9	10,009	Sarah Thompson	Country Rock
10	10,009	Sarah Thompson	Modern Rock

6. ENTERTAINERS – REVENUE TABLE

	A-Z entstagename ▼	123 total_bookings ▼	123 total_revenue ▼	123 avg_contract_value ▼
1	Country Feeling	15	34,080	2,272
2	JV & the Deep Six	10	17,150	1,715
3	Caroline Coie Quartet	11	15,070	1,370
4	Coldwater Cattle Company	8	14,875	1,859.375
5	Modern Dance	10	14,600	1,460
6	Saturday Revue	9	11,550	1,283.3333333333
7	Carol Peacock Trio	11	11,080	1,007.2727272727
8	Topazz	7	6,620	945.7142857143
9	Jazz Persuasion	7	5,480	782.8571428571
10	Julia Schnebly	8	4,345	543.125