**Business Analyst Assignment: Data Analysis & Business Insights**

## **Objective**

Evaluate business performance by analyzing key metrics, identifying trends, and providing actionable insights. Build a **Monthly Business Tracking Table** to monitor transaction volume, success rates, active companies, and churn rate.

Dataset: [OTPLESS Sample Data Set](https://docs.google.com/spreadsheets/d/1e5eKH-94WIcCmvbjh89WJUMXQMjJi9W29oJYoQep7QI/edit?usp=sharing)

## **Part 1: Data Analysis & Business Tracking Table**

### **1. Key Metrics to Calculate (Month-over-Month Basis)**

Using the provided dataset, compute the following for each month:

1. **Total Transactions Initiated** – Sum of transactions initiated.
2. **Total Transactions Successful** – Sum of successful transactions.
3. **Success Rate (%)** – (Total Transactions Successful / Total Transactions Initiated) \* 100.
4. **Active Companies** – Companies that initiated transactions in the given month.
5. **Churned Companies** – Companies that were active in the previous month but had no transactions in the current month.
6. **Churn Rate (%)** – (Churned Companies / Active Companies from the previous month) \* 100.

### **2. Table Format**

| **Month** | **Total Transactions Initiated** | **Total Transactions Successful** | **Success Rate (%)** | **Active Companies** | **Churned Companies** | **Churn Rate (%)** |
| --- | --- | --- | --- | --- | --- | --- |
| Jan 2023 | X | Y | (Y/X \* 100) | A | B | (B / A \* 100) |
| Feb 2023 | X | Y | (Y/X \* 100) | A | B | (B / A \* 100) |
| Mar 2023 | X | Y | (Y/X \* 100) | A | B | (B / A \* 100) |
| ... | ... | ... | ... | ... | ... | ... |

## **Part 2: Business Insights & Strategic Analysis**

### **A. Industry & Company Performance**

1. Identify the **top and bottom industries** based on transaction volume and success rate.
2. Highlight the **top 5 and bottom 5 companies** in terms of success rate.
3. Identify companies with **high transaction volume but low success rates**—what could be the reasons?

### **B. Time-Series Trends**

1. Analyze **monthly trends** in transaction volume and success rate—are there seasonal patterns?
2. Are there industries showing **improving or declining success rates** over time?

### **C. Active Companies & Churn Rate**

1. Track the **trend of active companies** over time—are more companies staying active?
2. Identify industries with **higher churn rates**—what might be causing it?

### **D. Business Recommendations**

1. Based on the data, suggest **strategies to improve transaction success rates** in underperforming industries.
2. Provide recommendations for **reducing churn rate** and retaining more active companies.
3. Suggest **additional data points** that could enhance business decision-making.

## **Part 3: Deliverables & Submission Details**

### **1. Required Deliverables**

✅ **A structured Monthly Business Tracking Table (Excel/Google Sheets). You can either use SQL / excel to give the insights. If SQL is being used, share the query in a separate note**✅ **Analysis and key observations based on trends**✅ **Business recommendations derived from insights**

### **2. Submission Format**

* **File Format:** Excel (.xlsx) or Google Sheets link
* **Naming Convention:** [YourName]\_Business\_Tracking\_Assignment.xlsx

## **Evaluation Criteria**

🔹 **Data Accuracy:** Correct calculations and consistency in metrics.  
🔹 **Analytical Thinking:** Ability to derive insights and trends from data.  
🔹 **Business Understanding:** Practical and actionable recommendations.  
🔹 **Presentation & Clarity:** Structured approach and clear documentation.