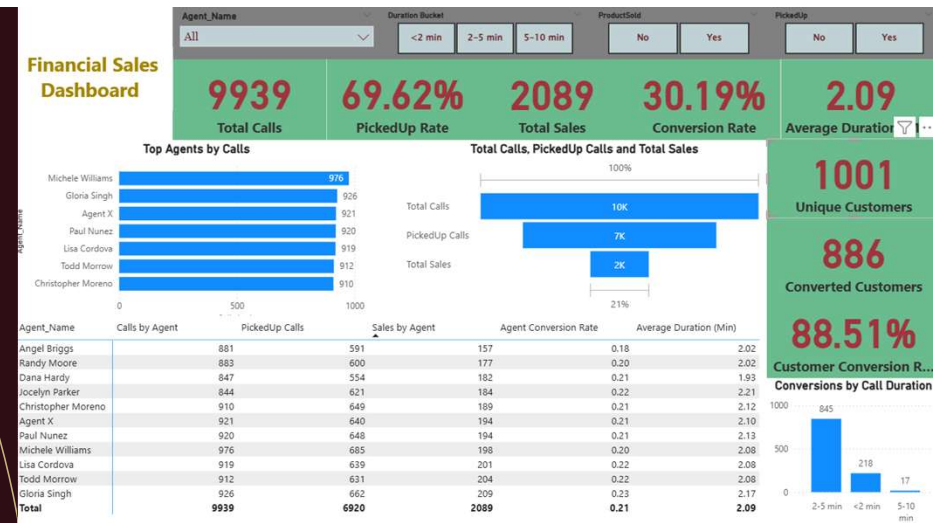# Financial Sales Dashboard

Enhancing Financial Sales Performance with an Interactive Dashboard:

- **Objective**: To present the creation and insights of an interactive Financial Sales Dashboard.

- **Focus**: Improving sales performance through data-driven decision-making.

- **Value**: Actionable insights into agent performance, customer behavior, and call efficiency.


By: Sayed Wahid

Agenda

Key Topics Covered:

- Objectives: Project goals and dashboard functionalities.

- Tools Used: Power BI and Excel.

- Dataset Overview: Understanding the data.

- Data Preparation: Cleaning and standardizing data.

- Dashboard KPIs: Key Performance Indicators.

- Business Insights: Analysis and findings.

- Actionable Recommendations: Strategies for improvement.

- Conclusions: Summary of the presentation.
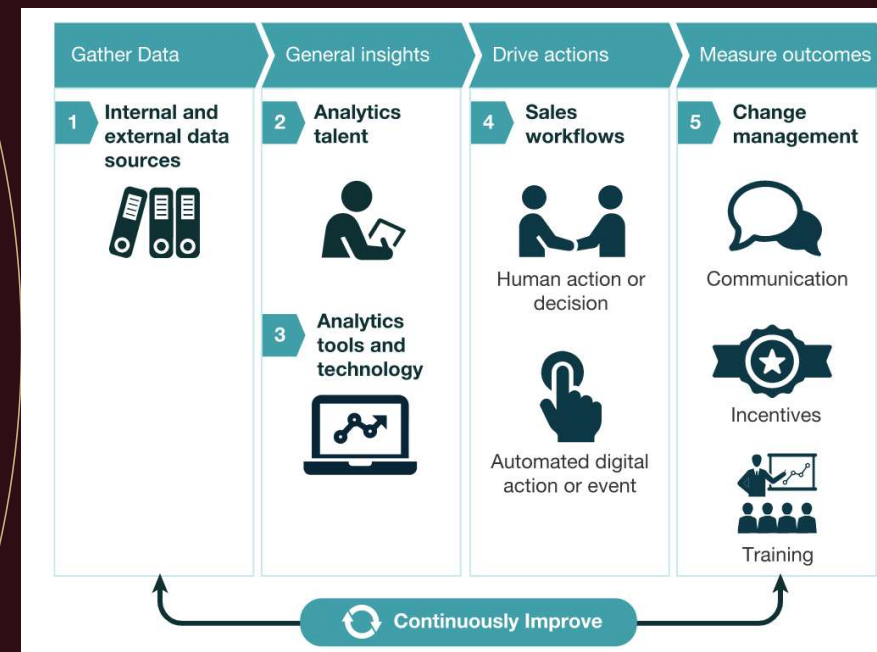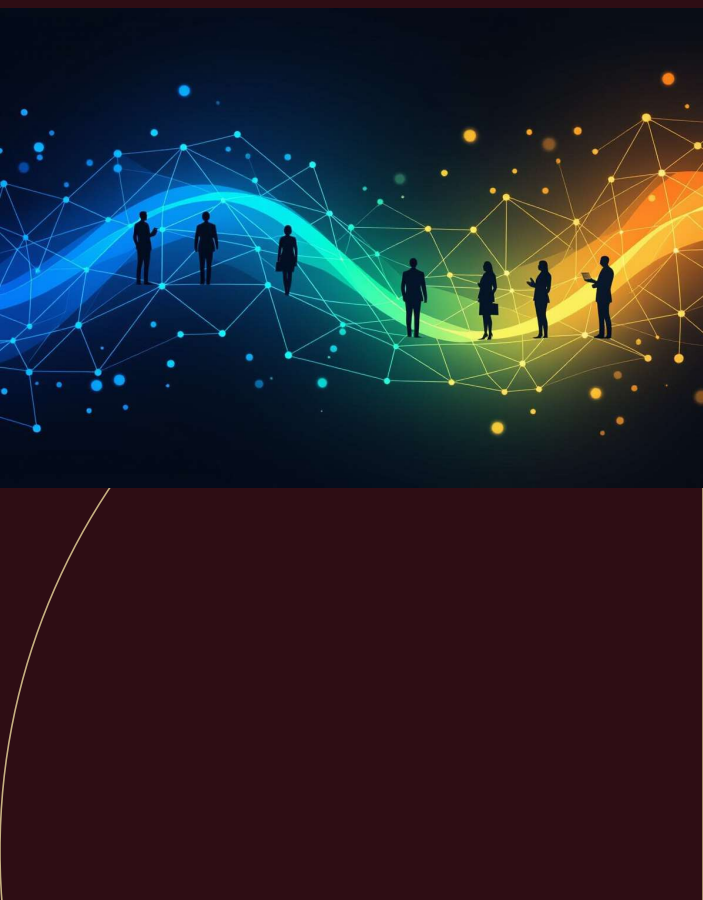
Objective of the Dashboard

Project Goal: To design an interactive dashboard that monitors:

- Call Activity: Tracking total calls made.

- Customer Engagement: Measuring picked-up calls and customer interactions.

- Sales Conversion: Analyzing conversion rates effectively.

Stakeholder Benefits:

Provides actionable insights into agent performance.

Highlights customer behavior patterns.

Improves call efficiency and sales strategies.

Tools Used

Overview:

- Power BI:

  - Dashboard Design: Creating interactive visualizations.

  - DAX Measures: Developing key performance indicators.

  - Visualization: Presenting data in an easily understandable format.

- Excel:

  - Data Cleaning: Removing in consist Standardizing fields and assigning correct column types. encies and errors.

  - Data Preparation:
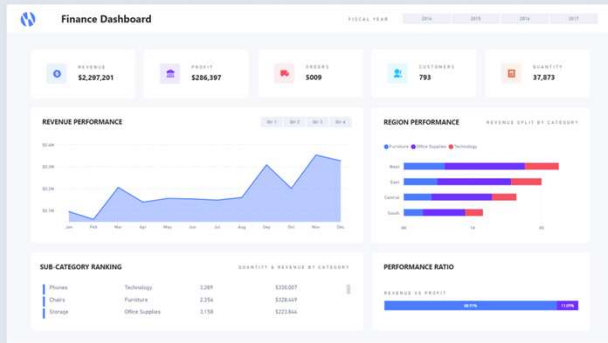
Dataset Overview

Sales of Financial Products Clean Data

Total Rows: 9,939

Key Fields:

AgentID, CallID, CustomerID

PickedUp (Yes/No)

Duration (seconds)

ProductSold (Yes/No)

Agent_Name

Significance

Each data point contributes to understanding sales performance, customer

engagement, and agent effectiveness.

Data Preparation Process

Process Overview:

- Cleaning and Standardization:
    - Picked Up and Product Sold fields: Standardized as Yes/No.
    - Column Types:
        - IDs: Text
        - Duration: Numeric (seconds)
- Calculated Fields:
    - Duration Bucket: <2 min, 2–5 min, 5–10 min, 10+min

Ensuring Accuracy: Data preparation ensures data accuracy and consistency for reliable analysis.

Power BI

Sales KPI
Dashboard

Biz Infograph
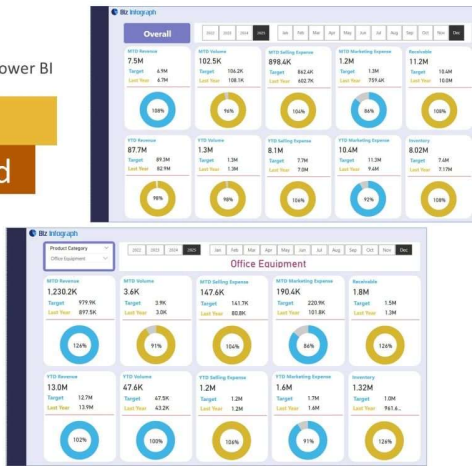
Key DAX Measures

Driving Insights:

- Total Calls: Total number of calls made.

- PickedUp Calls & PickedUp Rate: Number and rate of calls answered.

- Total Sales & Conversion Rate: Number of sales and conversion percentage.

- Average Duration (minutes): Average call length.

- Unique Customers: Total unique customers contacted.

- Converted Customers: Number of customers who made a purchase.

- Customer Conversion Rate: Percentage of unique customers who converted.

Financial Performance KPI Dashboard Showing…

	Financial Performance - YTD			
Metric	Actual	On Plan		Previous
Revenue	$31,180,780			$27,960,450
Goss Margin	40%			35%
Working Capital	$4,850,910			$2,210,450
Stock Price	$10.50			$7.50

Regional Sales Status - YTD

Cash

Ratios

3 Quick Ratio Target: > 1.5
4 Current Ratio Target: > 3.2
2 Debt to Equity Target: > 1
6 AR Turnover Target: > 4.5

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

Dashboard KPIs – Overview

Key Performance Indicators:

- 📞 Total Calls: 9,939

- ☎ PickedUp Rate: 69.62%

- 💰 Total Sales: 2,089

- 🎯 Conversion Rate: 30.19%

- ⏱ Average Duration: 2.09 minutes

- 👥 Unique Customers: 1,001

- ✅ Converted Customers: 886

- 🎯 Customer Conversion Rate: 88.5%

KPI Insights: Conversion Rates

Overall Conversion Rate:

- 30.19% overall conversion rate
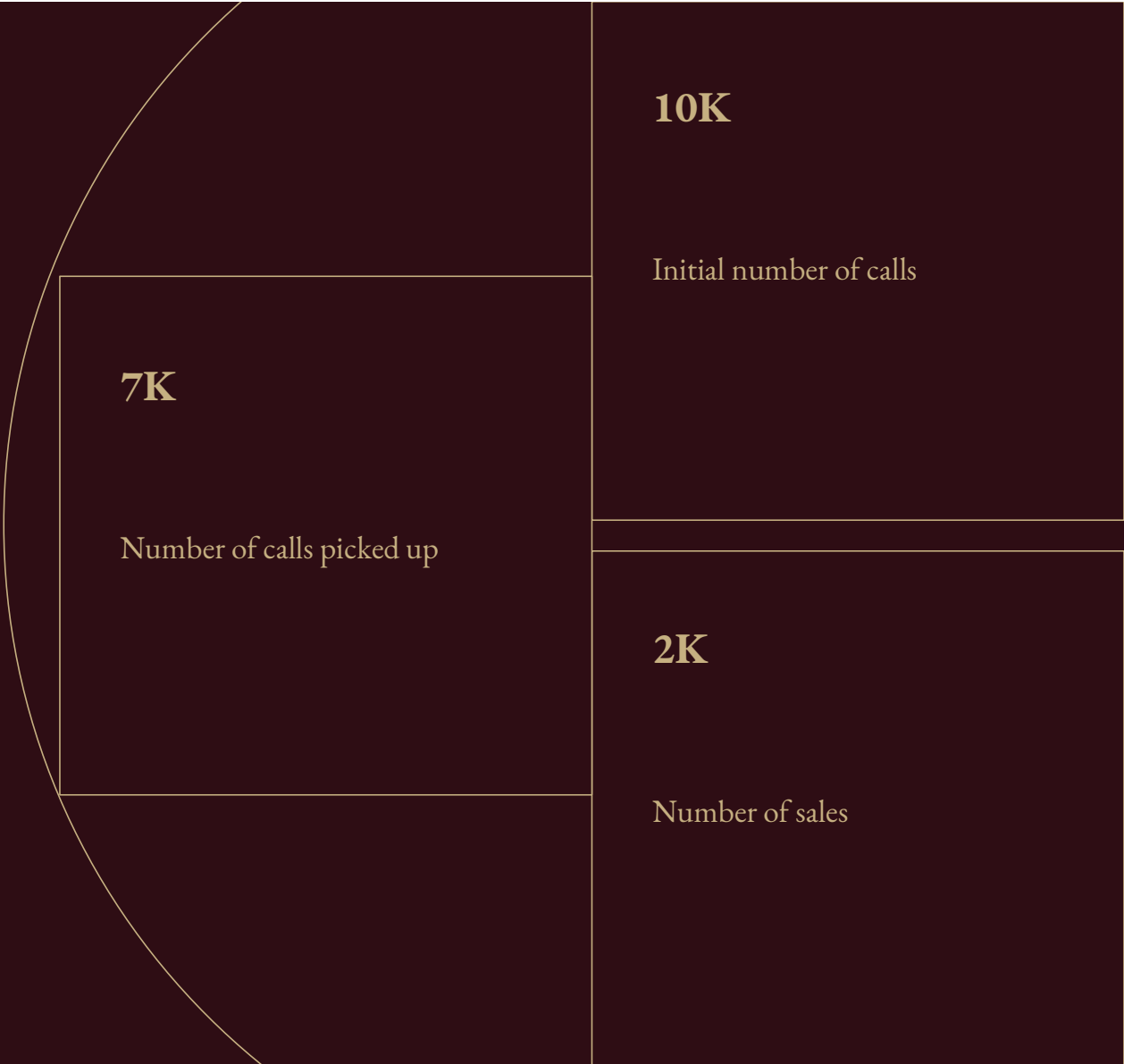
Implications for Performance:

Indicates the percentage of calls that resulted in a sale.

Provides a benchmark for measuring sales effectiveness.

Analysis:

Understanding factors influencing conversion rates can improve sales strategies.
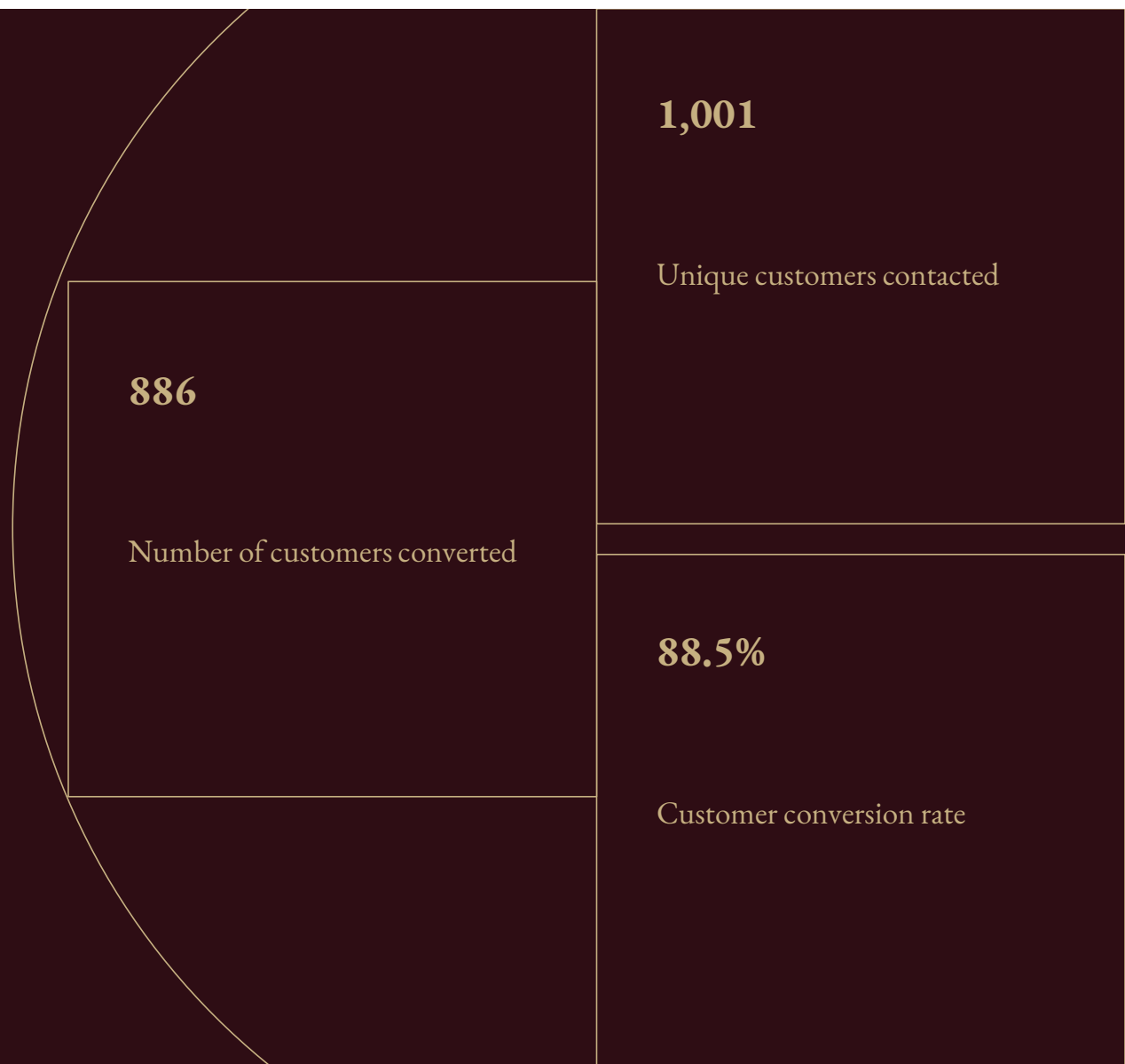
Funnel Analysis Insights

10K

Initial number of calls

7K

Number of calls picked up

2K

Number of sales

Agent Performance Metrics

~20–23%

Conversion efficiency across agents

Michele Williams, Gloria Singh, Agent X

Top Agents (Calls)

Gloria Singh, Michele Williams

Identifying and sharing best practices from high-performing agents

Gloria Singh (209), Michele Williams (198)

Top Sales

Customer Insights

1,001

Unique customers contacted

886

Number of customers converted

88.5%

Customer conversion rate

Duration Analysis

Insights on call duration:

- Best conversion for 2–5 minute calls (845 conversions).

- Very short (<2 min) and very long (>10 min) calls convert poorly.

Training Guidelines:

Optimal call length identified for training guidelines.

Recommendations:

Train agents to maintain calls within the 2-5 minute range for effective sales engagement.

Actionable Recommendations

Improving Sales Performance:

- Implement training programs focused on call engagement and closing techniques.

- Optimize call processes to improve conversion rates after initial contact.

- Share best practices from top-performing agents to enhance overall team performance.

- Focus on maintaining call durations within the optimal 2-5 minute range.
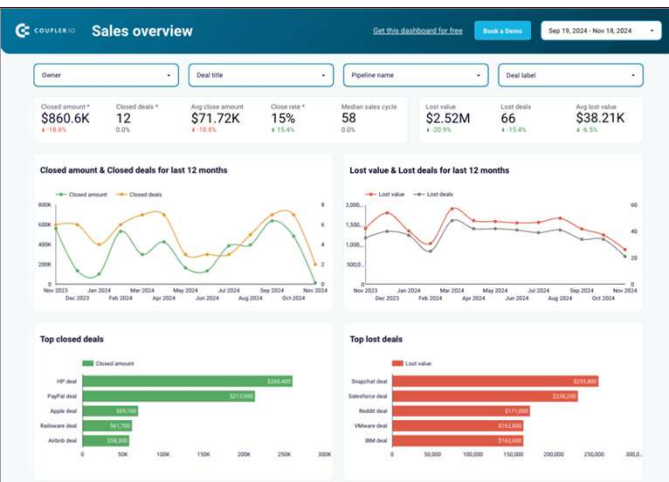
Conclusion

Key Points:

- The Financial Sales Dashboard provides actionable insights into sales performance.
- Data-driven decisions can improve agent effectiveness and customer engagement.
- Continuous monitoring and optimization are essential for achieving sales goals.

Importance: The dashboard is crucial for driving business decisions and improving overall sales strategy.