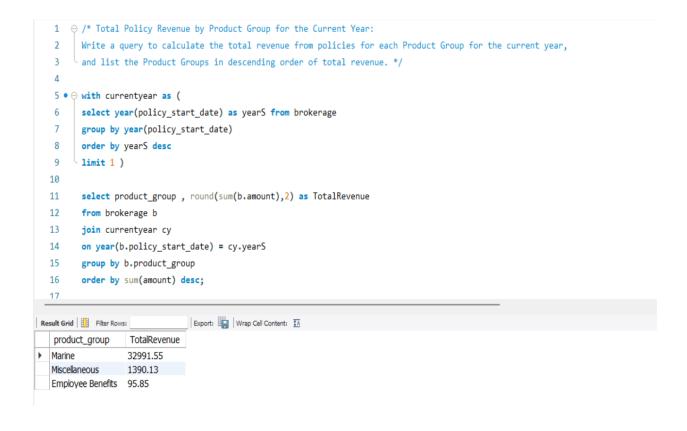
Integrated Financial and Revenue Analysis

The objective of this project is to conduct a detailed analysis of financial performance and operational metrics using SQL queries to derive actionable insights. We aim to evaluate total policy revenue by product group, compare commissions and policy amounts across Account Executives, and analyze budget utilization versus new allocations. Additionally, we will assess the impact of meetings on opportunity closures, summarize quarterly revenue and transactions by Solution Group, identify top revenue-generating opportunities, and calculate average revenue per policy by Solution Group. By measuring revenue contributions of product groups and sub-groups, the project supports strategic decision-making and enhances financial and operational effectiveness.

DATASET || SQL Script

□ Total Policy Revenue by Product Group for the Current Year:

 Write a query to calculate the total revenue from policies for each Product Group for the current year, and list the Product Groups in descending order of total revenue.



□ Commission and Fees Analysis by Account Executive:

 Construct a query to compare the total commissions (from fees) and total policy amounts (from brokerage) for each Account Executive, and identify the Account Executive with the highest combined total.

```
Construct a query to compare the total commissions (from fees) and total policy amounts (from brokerage) for each Account Executive,
       and identify the Account Executive with the highest combined total*/
  22
  23 • ⊖ with TotalCommisions As (
        select Account_Executive , sum(Amount) as TotalCommission from fees group by Account_Executive) ,
       TotalPolicyAmount AS
  25
  26 ⊖ (
  27
        select Exe Name as Account Executive , sum(Amount) as TotalPolicyAmt from brokerage group by Exe Name
  28
  30
        Select coalesce(c.Account_Executive,p.Account_Executive) AS Account_Executive,
  31
        coalesce(TotalCommission,0) + coalesce(TotalPolicyAmt,0) AS CombinedTotal
  32
        From TotalCommisions C
  33
        Left join TotalPolicyAmount p on c.Account Executive = p.Account Executive
        Select coalesce(c.Account_Executive,p.Account_Executive) AS Account_Executive,
        coalesce(TotalCommission,0) + coalesce(TotalPolicyAmt,0) AS CombinedTotal
  37
        From TotalCommisions C
  38
        right join TotalPolicyAmount p on c.Account_Executive = p.Account_Executive )
  39
        Select Account Executive, Round(CombinedTotal,2) from CombinedCommission Order by CombinedTotal DESC Limit 1;
Result Grid Filter Rows:
                                Export: Wrap Cell Content: IA
  Account_Executive Round(CombinedTotal,2)
Vinay
                    15441750.08
```

□ Budget Utilization vs. New Budget Allocation by Income Class:

 Develop a query to compare the actual budget utilization (from the fees table) against the new budget allocations (from the individual_budgets table) based on the income_class for each Account Executive.

```
→ /* Budget Utilization vs. New Budget Allocation by Income Class:

      Develop a query to compare the actual budget utilization (from the fees table) against the new budget allocations (from the individual budgets table)
       based on the income_class for each Account_Executive.
 46
 48 • ⊖ With ActualBudgetUtilization AS (
     Select Account Executive , Sum(Amount) AS ActualBudget, income class from fees group by Account Executive, income class),
 50 ⊝ NewBudgetAllocation AS (
 51
      Select Employee Name as Account Executive , Sum(New Budget) AS new budget,
       'New' as income_class
      from individual_budgets group by Employee_Name
 53
 55
      UNTON ALL
 57
       Select Employee_Name as Account_Executive , Sum(Cross_sell_bugdet) AS new_budget,
       'Cross Sell' as income_class
 58
 59
      from individual_budgets group by Employee_Name
 60
 61
 62
       Select Employee_Name as Account_Executive , Sum(Renewal_Budget) AS new_budget,
   64
            'Renewal' as income_class
   65
            from individual_budgets group by Employee_Name
   66
   67
   68
            SELECT
   69
                 a.Account_Executive AS Account_Executive,
   70
                 a.income_class AS IncomeClass,
                 COALESCE(a.ActualBudget, 0) AS ActualUtilized,
   71
                 COALESCE(b.new_budget, 0) AS BudgetAllocated
   72
            FROM ActualBudgetUtilization a
   73
            LEFT JOIN NewBudgetAllocation b
   74
            ON a.Account_Executive = b.Account_Executive
   75
   76
            AND a.income_class = b.income_class
            ORDER BY a.Account_Executive, a.income_class;
   77
Result Grid Filter Rows:
                                             Export: Wrap Cell Content: IA
                                             ActualUtilized
    Account_Executive
                            IncomeClass
                                                              BudgetAllocated
  Abhinav Shivam
                            New
                                             100000
                                                              129902
   Nishant Sharma
                           Cross Sell
                                             396480
                            Renewal
   Vinay
                                             18051
                                                              1500000
```

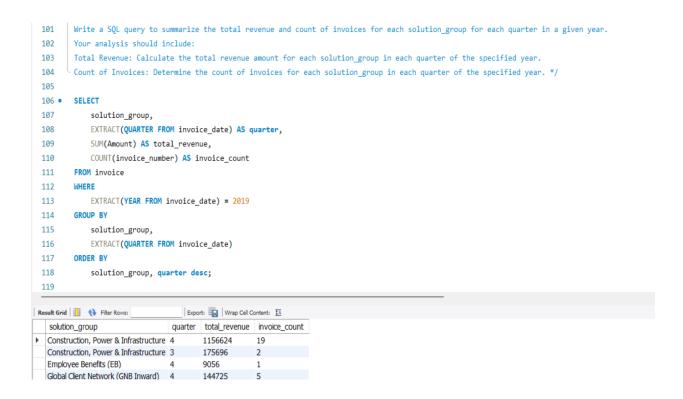
☐ Impact of Meetings on Opportunity Closure:

 Create a query to evaluate the impact of meetings on the closure of opportunities by comparing the number of opportunities closed before and after each meeting, and identify meetings with the highest positive impact.

```
Create a query to evaluate the impact of meetings on the closure of opportunities by comparing the number of opportunities closed before and after each meeting,
     and identify meetings with the highest positive impact. */
83 • \ominus WITH OpportunitiesBeforeAfter AS (
     Select m.Account_Exe_Id As Account_Exe_Id , m.Account_Executive AS Account_Executive, m.meeting_date AS meeting_date ,
85 Count(CASE when o.closing_date <= m.meeting_date THEN o.opportunity_id END) AS OpportunityBefore,
    Count(CASE when o.closing_date > m.meeting_date THEN o.opportunity_id END) AS OpportunityAfter
87 from meeting m
88 left join opportunity o
    on m.Account_Exe_Id = o. Account_Exe_Id
      group by m.Account_Exe_Id , m.Account_Executive , m.meeting_date ),
91
93
      Select Account_Exe_Id, Account_Executive , meeting_date , OpportunityBefore, OpportunityAfter , (OpportunityAfter - OpportunityBefore) AS Impact
    from OpportunitiesBeforeAfter group by Account_Exe_Id, Account_Executive , meeting_date )
    select Account_Exe_Id, Account_Executive , meeting_date , OpportunityBefore, OpportunityAfter, Impact from ImpactAnalysis
96
     order by Impact DESC LIMIT 1;
                             Export: Wrap Cell Content: IA
Account_Exe_Id Account_Executive meeting_date OpportunityBefore OpportunityAfter Impact
                              2020-01-21 9
              Shivani Sharma
```

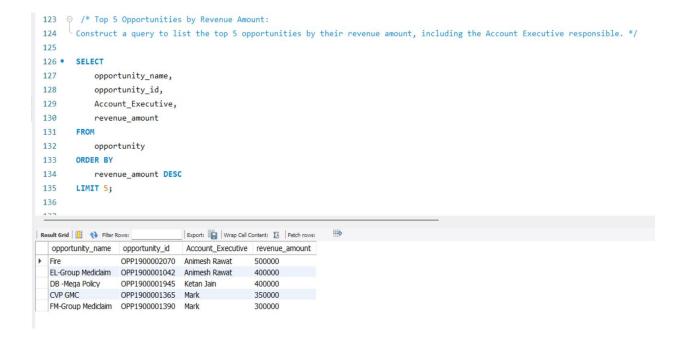
☐ Quarterly Revenue and Transaction Summary by Solution Group:

- Write a SQL query to summarize the total revenue and count of invoices for each solution_group for each quarter in a given year. Your analysis should include:
- 1. Total Revenue: Calculate the total revenue amount for each solution group in each quarter of the specified year.
- 2. Count of Invoices: Determine the count of invoices for each solution_group in each quarter of the specified year.



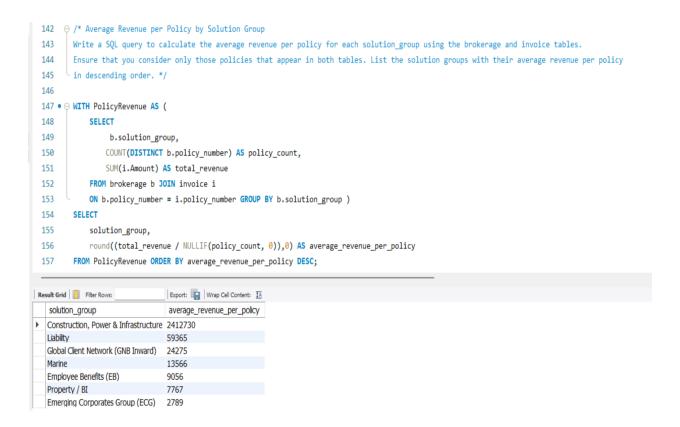
☐ Top 5 Opportunities by Revenue Amount:

 Construct a query to list the top 5 opportunities by their revenue amount, including the Account Executive responsible.



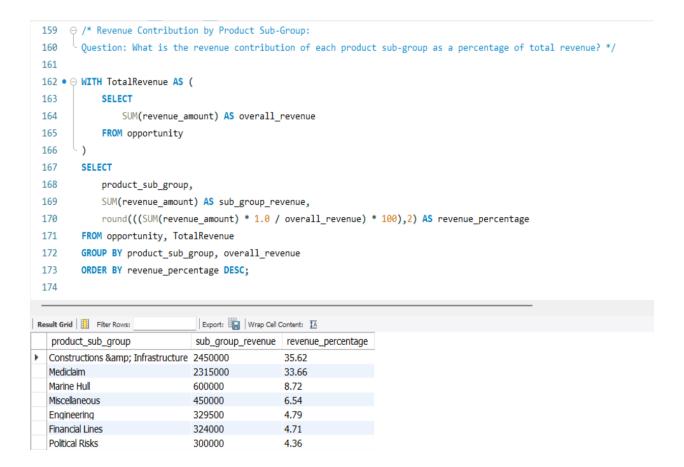
☐ Average Revenue per Policy by Solution Group

 Write a SQL query to calculate the average revenue per policy for each solution_group using the brokerage and invoice tables. Ensure that you consider only those policies that appear in both tables. List the solution groups with their average revenue per policy in descending order.



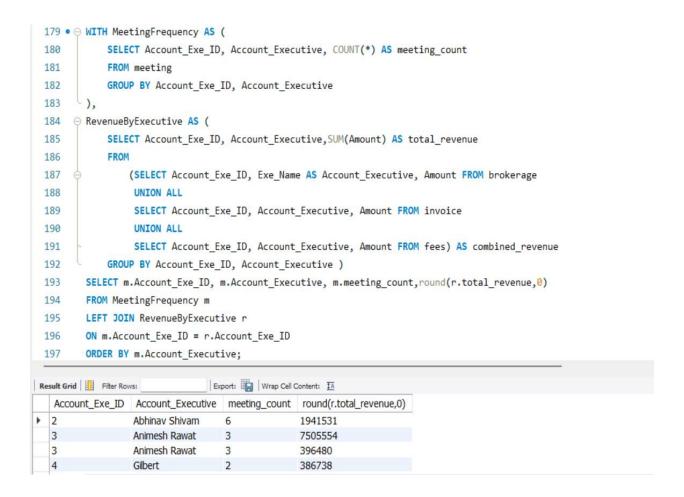
☐ Revenue Contribution by Product Sub-Group:

 What is the revenue contribution of each product sub-group as a percentage of total revenue?



☐ Meeting Frequency Analysis

 How often do meetings occur per Account Executive, and how does this correlate with their revenue generation?



Conclusion

□ Detailed Financial and Operational Insights:

 The project provided a thorough analysis of policy revenue, commissions, and budget utilization, offering actionable insights into financial performance and operational metrics.

□ Performance Comparisons:

 Comparative analysis of commissions and policy amounts across Account Executives highlighted performance variations and areas for potential improvement.

☐ Impact Analysis:

 Evaluated the effect of meetings on opportunity closures, enhancing understanding of sales strategies and their effectiveness.

□ Revenue and Transaction Trends:

 Summarized quarterly revenue and transactions by Solution Group and identified top revenue-generating opportunities, guiding focus on high-impact areas.

☐ Strategic Decision Support:

 Measured revenue contributions of product groups and sub-groups to support strategic decision-making, ultimately improving financial and operational effectiveness.