

CRM Sales Analysis

-By Sohan Suresh

As a BI Developer for MavenTech, I'm tasked with creating an interactive dashboard to enable sales managers to track their team's quarterly performance using data from a new CRM system.

This project aims to help MavenTech become a data-driven organization, providing visibility of sales opportunities outside of the CRM platform.



Defining Key Performance Indicators

We have defined key performance indicators (KPIs) that are crucial in measuring and optimizing our sales performance. These KPIs provide valuable insights into various aspects of our sales process, enabling us to make informed decisions and drive growth. Let's explore these KPIs in more detail.

- 1. Monthly Sales Growth:** "Monthly Sales Growth shows how our sales are trending month over month, helping us identify patterns and make informed decisions to drive future growth."
- 2. Sales Opportunity:** "Sales Opportunity reflects the potential revenue we can generate from current prospects, guiding our sales strategies and resource allocation."
- 3. Quote to Close Ratio:** "Quote to Close Ratio highlights our ability to turn quotes into revenue, showcasing our sales team's efficiency and effectiveness."
- 4. Average Purchase Value:** "Average Purchase Value gives insight into our customers' spending habits, enabling us to tailor our offerings and increase sales revenue per transaction."
- 5. Sales Per Rep:** "Sales Per Rep shows the contribution of each salesperson to our overall revenue, guiding us in recognizing top performers and providing support to others."
- 6. Lead to Sales Percentage:** "Lead to Sales % measures our ability to convert leads into customers, helping us assess the effectiveness of our lead generation and sales strategies."



Sales Dashboard

8800

Total Leads

4238

Total Sales

48.16%

Quote to Close Ratio

Select Quarter

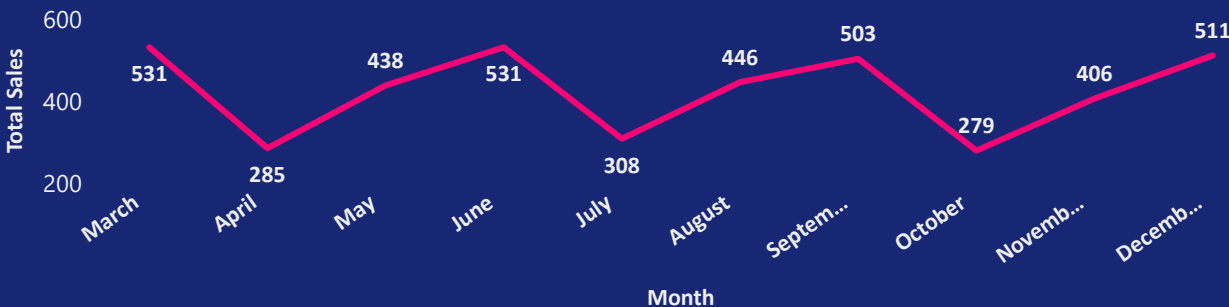
☐ Qtr 1

☐ Qtr 2

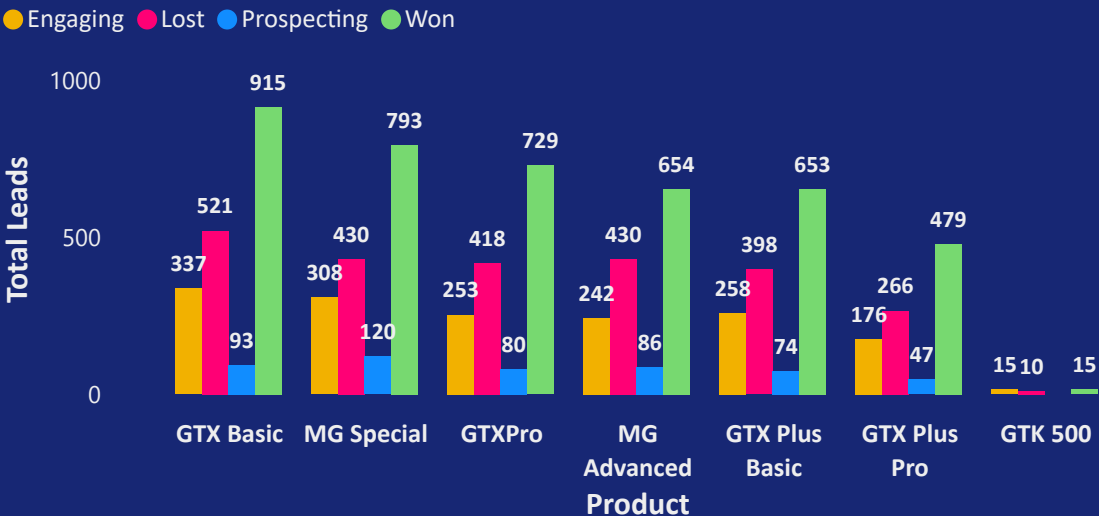
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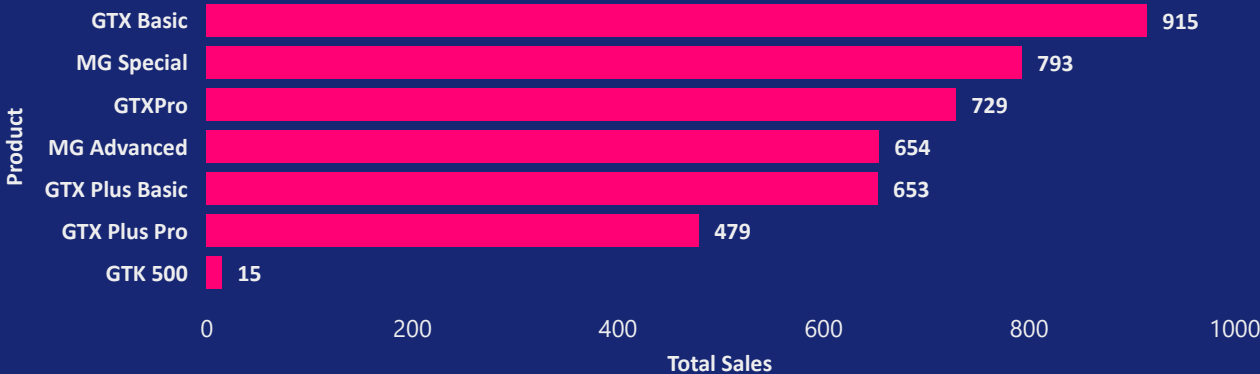
Monthly Sales Trend



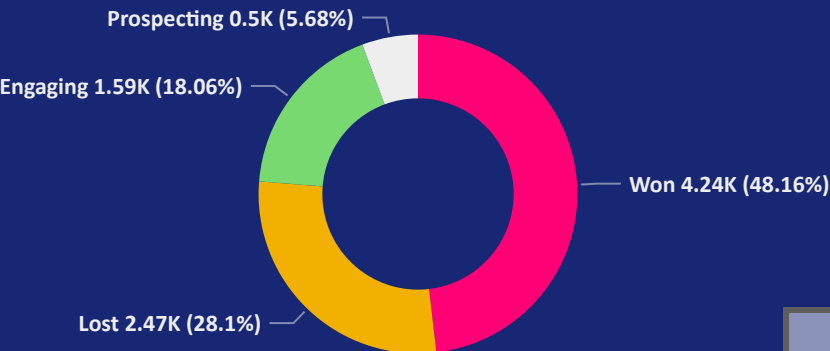
Product by Deal Stage



Total Sales by Product

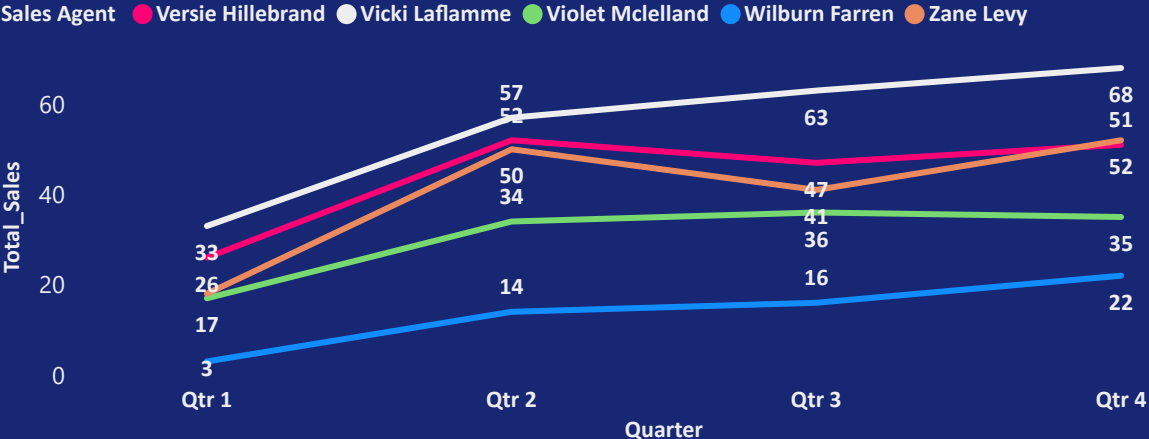


Deal Stages

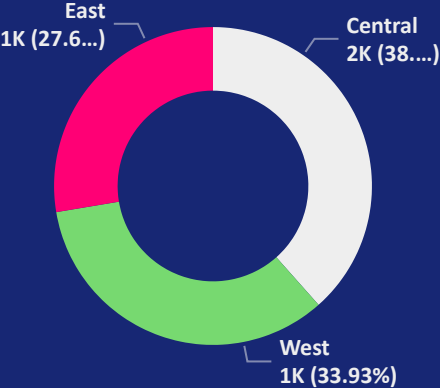


Agent Dashboard

Top five sales agent by Quarter



Sales by Region



Sales contribution of Managers

Cara Losch

480
Total Sales

Celia Rouche

610
Total Sales

Dustin Brinkmann

747
Total Sales

Melvin Marxen

882
Total Sales

Rocco Neubert

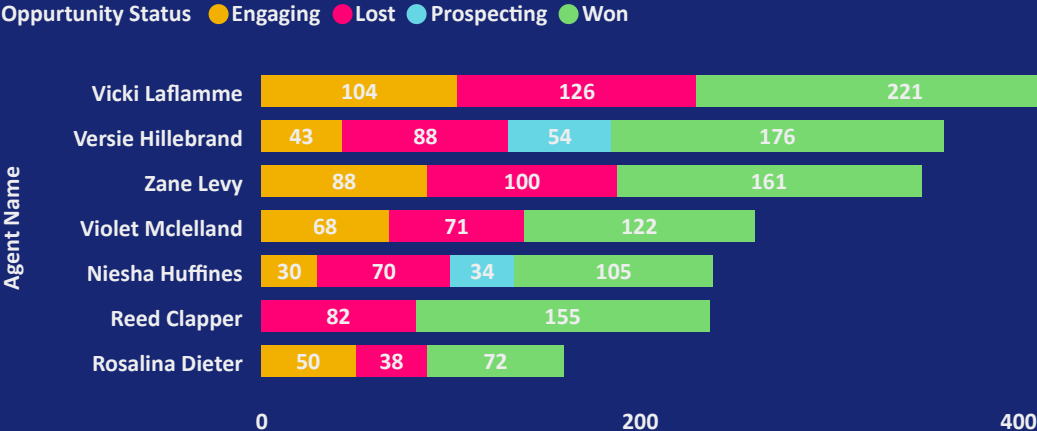
691
Total Sales

Summer Sewald

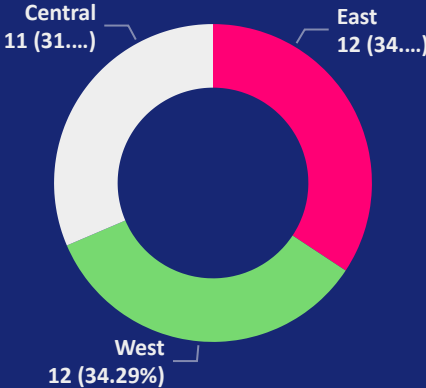
828
Total Sales



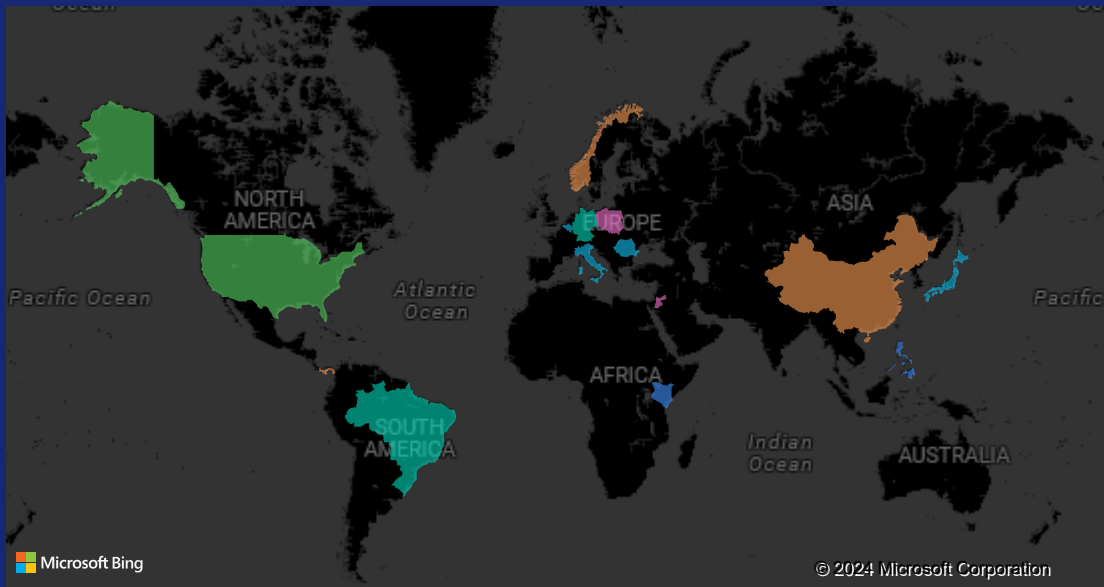
Top 10 Sales Agents



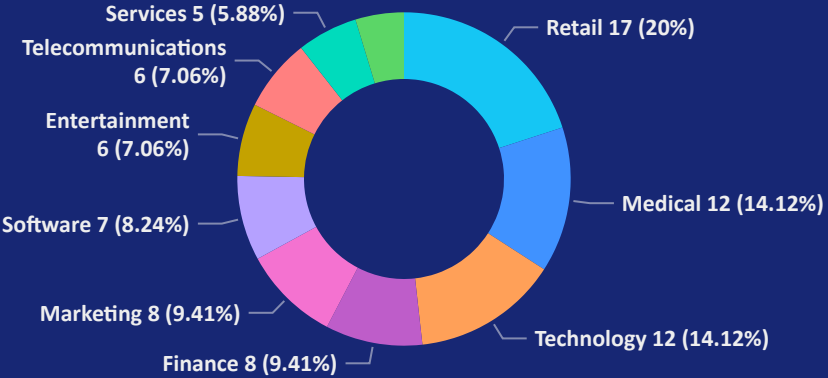
Managers in Regions



Accounts Dashboard



Accounts by Sector



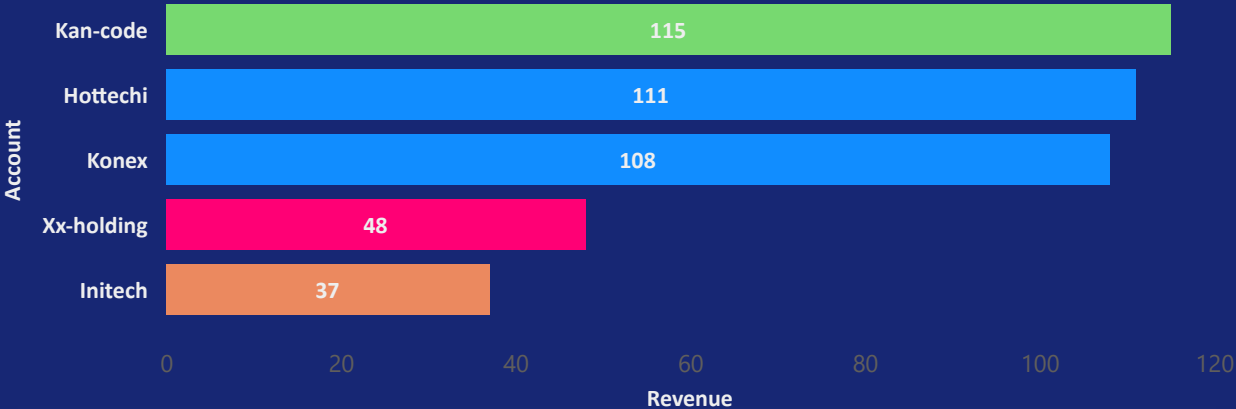
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Accounts without subsidiary

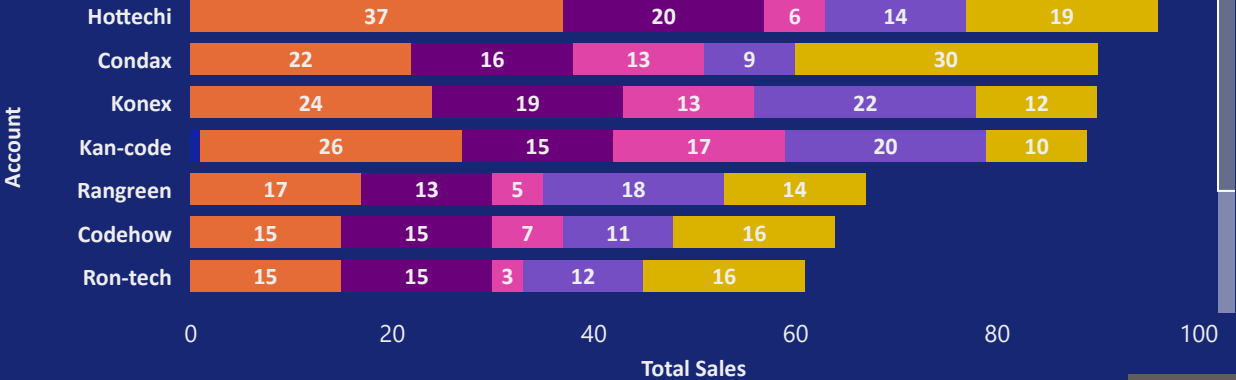
15

Accounts with Subsidiary

Total_Sales by account and sector



Product



Conclusion

1. In conclusion, the analysis of sales performance reveals several notable trends. Firstly, the product GTX Basic emerged as a significant contributor to overall sales, indicating its popularity or strategic positioning within the product portfolio. Secondly, the quote to close ratio of 48.16% suggests a relatively efficient conversion of quotes into successful sales, reflecting positively on the effectiveness of the sales process.
2. Moreover, the first quarter showcased the highest sales performance, with March standing out with total sales reaching 531 units, potentially indicating seasonal variations or targeted marketing efforts during this period. Additionally, sales agents from the eastern and western regions played a pivotal role in driving sales, with sales agent Vicki notably achieving the highest sales figures, underscoring the impact of individual sales efforts.
3. Lastly, the sales distribution across industries reveals that software companies were the primary purchasers, followed closely by technology companies, hinting at specific market trends or preferences within these sectors. These findings collectively provide valuable insights for strategic decision-making and resource allocation to further enhance sales performance.

