Performance Analysis Report: Business Development Team

1. Executive Summary

This report evaluates the lead generation performance of our Business Development Team over the recent months. The aim is to understand who the top performers are, how efficiently the team works, and where the team can improve to generate more qualified leads effectively. The lead generation performance data are for three associates namely **Ali, Arya,** and **Raj**. The analysis covers the period from June 12, 2023, to August 11, 2023.

The key findings are:

- **Overall Performance:** The team generated a total of **1,409 leads** in a total of 41 days, with an average of **34.37 leads per day**.

- **Top Performers:** Based on total leads, **Ali** was the **top performer** (488 leads), while **Arya** proved to be the **most consistent** with the lowest Coefficient of Variation (CV). The analysis also found that Arya is the most efficient, generating a lead in just 11.7 minutes on average.

- **Time Management:** Analysis shows that there appears to be an **optimal time window** for maximizing leads without unnecessary extra effort. Associates were most productive when they spent **between 101 and 300 minutes per day** on lead generation activities.

2. Detailed Analysis

The following visualizations and analysis are included in the Power BI dashboard to provide a clear overview. The dashboard is organized into logical sections for easy interpretation.

2.1 Core Performance Metrics

Lead Generation Efficiency: The efficiency for each associate was calculated as the ratio of total leads to total time spent on lead generation. Visualization used is a bar chart for comparing associates efficiency.

- **Finding: Arya** has the highest efficiency at 0.085 leads/minute, significantly outperforming Ali (0.053) and Raj (0.042). It is also found that each associate on average utilized the following minutes to generate 1 lead: Ali (18.9 mins/lead), Raj (23.7 mins/lead), and Arya (11.7 mins/lead).

Daily Performance Variability: Standard deviation of the daily number of leads generated by each associate to measure performance variability was calculated. Visualization used is a Bar chart comparing the standard deviation of daily leads for each associate.

- **Finding:** High variability is found in daily performance, with **Raj showing the most fluctuations** in leads generated daily (SD: 2.65), while **Arya** was the most consistent (SD: 2.16).

Performance Consistency: The Coefficient of Variation (CV) was calculated to measure consistency. A lower CV indicates more consistent performance. Visualization used is a Bar chart comparing the CV of each associate.

- **Finding: Arya** is the most consistent performer with a CV of 0.19 while Ali (0.26) and Raj (0.24) show greater variability.

2.2 Time vs. Leads Analysis

Time Management Analysis: Analysis done on the relationship between the average time spent per lead and the number of leads generated. Visualization used is Scatter plot with a trendline.

- **Finding:** Our Analysis found a significant negative correlation for all three associates. This means that as the average time spent on a single lead decreases, the total number of leads generated tends to increase. This is a crucial finding for optimizing efficiency.

Impact of Longer Lead Generation Time: Analysed if there is a threshold in the time spent on lead generation beyond which the number of leads generated significantly increases. Visualization used is a column chart with time bins (e.g., <100 mins, 101-200 mins, 201-300, 301-400).

- **Finding:** Our analysis shows that there appears to be an **optimal time window** for maximizing leads without unnecessary extra effort. Associates were most productive when they spent **between 101 and 300 minutes** on lead generation activities. **Arya** generated most of the leads between **100 and 200 minutes** while **Ali** and **Raj** generated most leads between **200-300 minutes**.

2.3 Event & Day Analysis

Impact of Team Reviews: Compared the average leads generated on days when reviews were attended versus missed . Visualization used is clustered column chart to compare "Attended" vs. "Missed" average leads.

- **Finding:** Attending daily team reviews is associated with a positive performance increase for both **Ali (+8.41%)** and **Raj (+4.03%)**. It is important to note that this finding is based on a very limited sample size of only one missed day for each of them. A larger dataset is needed to confirm this conclusion.

Comparative Day Analysis: Analysed the average leads on weekdays versus weekend. Visualization used is a clustered column chart comparing weekday vs. weekend average leads.

- **Finding:** Raj's average lead generation on weekends is significantly higher than on weekdays **(16 vs. 10.78)**. However, this finding is based on a single weekend day and cannot be considered an accurate representation of his weekend efficiency. Ali and Arya did not have any data for weekend lead generation.

High-Performance Days: Also studied the top 10% of days with the highest lead generation for each associate and calculated the average time spent on those days. Visualization used is a bar chart comparing the average time spent on high-performing days vs on rest of the days

- **Finding:** High-performing days (top 10% lead outputs) tend to coincide with longer time investments in lead generation activities compared to rest of the days.

2.4 Trends & Predictions

Incomplete Leads Reduction: Investigated the trend of incomplete leads over time. Visualization used is a line chart showing the number of incomplete leads over time for each associate.

- **Finding: Raj** shows a statistically significant trend of reducing incomplete leads. The number of incomplete leads for Arya and Raj is very low, which means high overall efficiency.

Predictive Analysis: Simple linear regression model has been used to attempt to predict leads based on time spent. Done some Python coding to visualize, calculate and display the R-squared and RMSE, along with a scatter plot with a trendline.

- **Finding:** The model's accuracy was low, the R-squared values indicates that time spent alone is not a reliable predictor of lead generation. This suggests that other factors are more influential on an associate's performance.

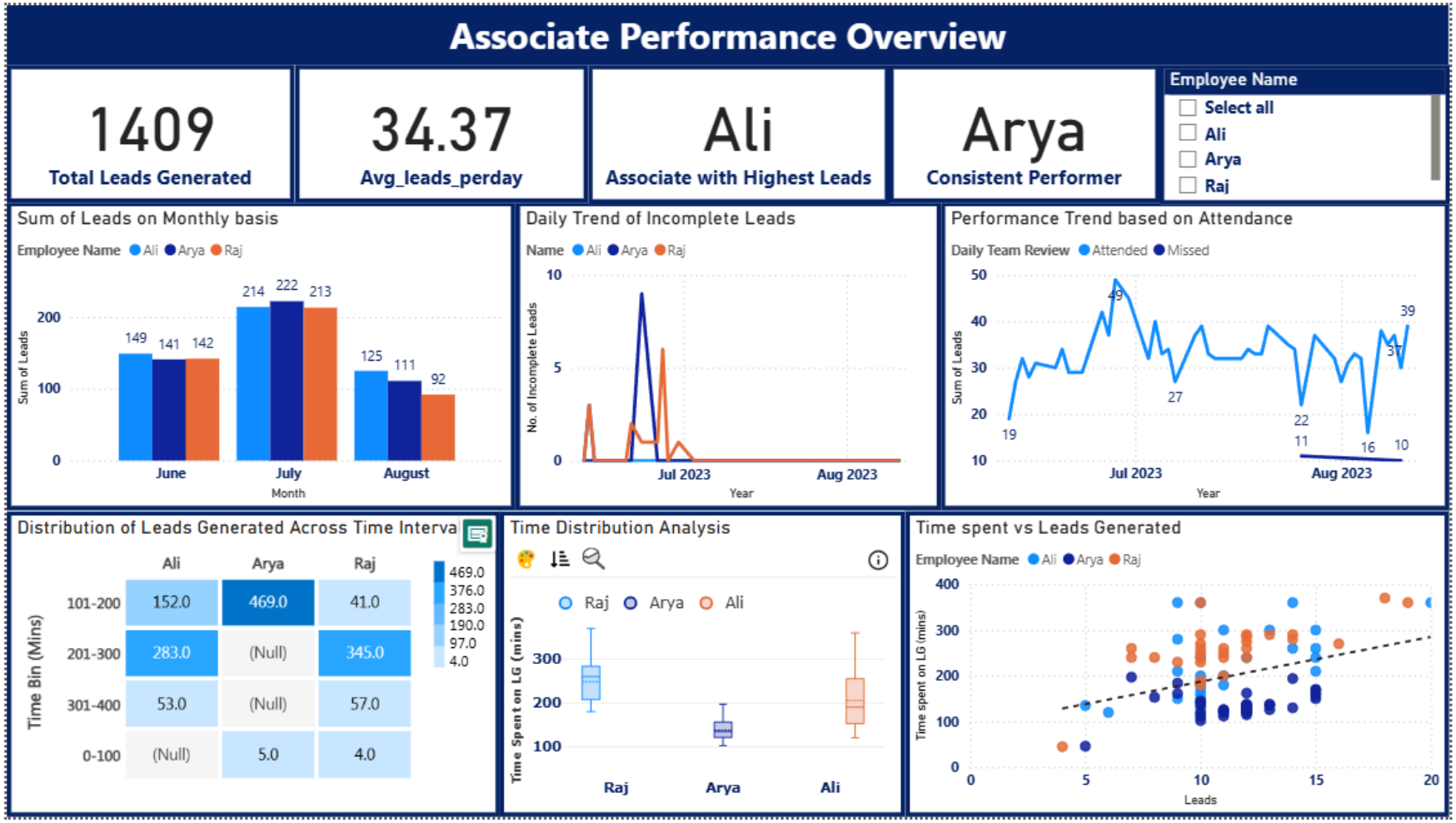
Next Month's Projection (September):

- **Method:** My projection for the next month is based on the growth rate, taking into account the historical performance observed in the dataset.
- **Finding:** Tentative projection of the total leads for September to be between 650 to 750.

3. Recommendations

1. Even though the data is limited, it suggests a positive performance correlation on days when team reviews were attended. I recommend continuing to track this metric over a longer period to see if the trend holds and consider making daily team reviews mandatory to boost team productivity.
2. Arya's consistent performance and high efficiency are commendable. I recommend conducting a deeper dive into her lead generation strategies to identify best practices that can be shared with the entire team.
3. I recommend tracking a 200-minute focused block for lead generation for two weeks. The goal is to test if dedicated time in the identified optimal window can consistently maximize output. The team should also capture process notes on each person's top days to understand the methods behind their success.
4. Analysis shows that time spent alone can't be the only factor in lead generation. I recommend the team begin tracking and analyzing other activity-based metrics, such as the number of calls made, emails sent, and meetings booked etc. By understanding which specific activities drive conversions, the company can provide more targeted and effective guidance to improve overall team performance.

4. Dashboard


Associate Performance Overview
1409
Total Leads Generated
34.37
Avg_leads_perday
Ali
Associate with Highest Leads
Arya
Consistent Performer
Employee Name
Select all
Ali
Arya
Raj
Sum of Leads on Monthly basis
Employee Name Ali Arya Raj
Sum of Leads
Month
June
July
August
149 141 142
214 222 213
125 111 92
Daily Trend of Incomplete Leads
Name Ali Arya Raj
No. of Incomplete Leads
Year
Jul 2023
Aug 2023
Performance Trend based on Attendance
Daily Team Review Attended Missed
Sum of Leads
Year
Jul 2023
Aug 2023
Distribution of Leads Generated Across Time Interva
Ali
Arya
Raj
Time Bin (Mins)
101-200 152.0 469.0 41.0
201-300 283.0 (Null) 345.0
301-400 53.0 (Null) 57.0
0-100 (Null) 5.0 4.0
469.0
376.0
283.0
190.0
97.0
4.0
Time Distribution Analysis
Raj Arya Ali
Time Spent on LG (mins)
Raj
Arya
Ali
Time spent vs Leads Generated
Employee Name Ali Arya Raj
Time spent on LG (mins)
Leads