National
College *of*
Ireland

Implementation Report

"EXPRESS MART SALES ANALYSIS"

Anukrithika Urc
x22234161

Pooja Krishnamoorthy
x23131179

Sushma S Hebbalakar
x22224122

Master's in Data Analytics

National College of Ireland
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Implementation Report for "Express Mart"

Anukirthika Uthamavaravichandran (x22234161@student.ncirl.ie)
Pooja krishnamoorthy (x23131179@student.ncirl.ie)
Sushma Suresh Hebbalakar (x22224122@student.ncirl.ie)

I. ZOHO CRM

Zoho CRM is a web-based customer relationship management solution developed by Zoho Corporation. For our Client, we are implementing Zoho CRM to manage their business, streamline the sales process, Expand the business and improve the overall experience for the customer and stakeholders. Zoho CRM provides a broad spectrum of tools for customer interactions, marketing and sales. The basic Zoho schema is explained in the fig [1]

II. ZOHO SCHEMA AND MODULES

For our Project analysis, we have deployed multiple different steps in the Zoho deployment process (Data Migration) where we have imported the CSV file (our data set) from our local system into the Zoho portal by the below steps:

1) Log in to Zoho CRM
2) Navigate to Settings
3) Navigate to data Management
4) Click on import
5) Click on other CRM
6) Name the source of file
7) Browse the file from the local system(The csv data set)
8) Uplaod the file and wait till it gets completed.

The Modules are the entities which group the like type data types such as the contact details of customer such as email,mobile number, social profiles,mailing address, fax will be grouped under contacts modules. Like wise, for the "Express mart we have customized specific modules which goes along the business line.

The Modules used from "Express Mart" from ZOHO CRM:

1) Leads
2) Contacts
3) Deals
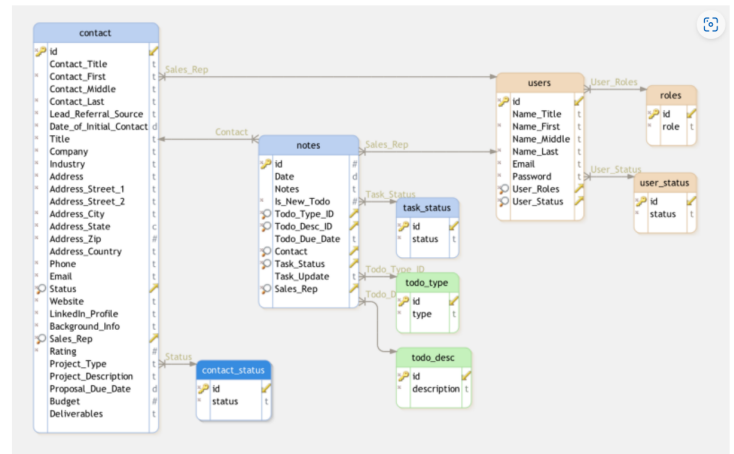4) Products
5) Projects
6) Meetings
7) Analytics

Fig. 1. Zoho CRM schema

III. CASE PROFILING FOR "EXPRESS MART"

Express Mart doesn't have a stream of processes for their business which was a major hindrance to the business growth. We are going to implement various types of strategies for "Express mart" to improve the existing business and open a way for new business as well.We have established 3 types of case profiling for Express Mart as below:

1) Marketing
2) Sales
3) Services

A. Marketing

Campaigns:
In Zoho, a campaign is a marketing endeavour or a set of activities to improve or promote existing products, services or series of events. For Express Mart it gives the ability to plan, implement, carry out and pave the way for the sucess of various marketing programs which involve email as campaigns (Refer Figure 2 and 3), Advertising in social media, referral programs, and Banner advertising.

- Lead Generation Campaigns:
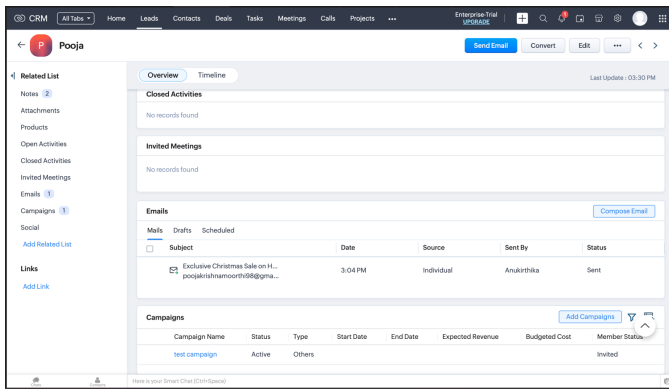- Nurturing Campaigns:
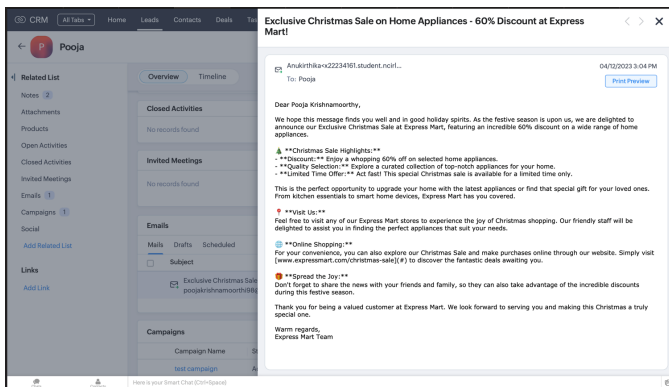- Opportunity Creation Campaigns

Fig. 2. Email Campaigns

Fig. 3. Email

Fig. 4. Lead Creation - Sales

By engaging marketing efforts with campaigns such as email campaigns, Advertising in social media, referral programs, and Banner advertising. contacts, businesses can create a seamless and efficient process that maximizes customer acquisition, engagement, and retention. The integration of marketing via the Zoho CRM system leads to improved overall business performance.

B. Sales

This role is primarily focused on diligently pursuing leads, skillfully managing customer relationships, identifying and overseeing opportunities, with the ultimate goal of successfully closing sales.The Modules which are associated with sales are:

1) **Lead**
   The term lead refers to an individual or business in terms of the entity that has shown interest in a service offered by a business.
   In our case Express mart, We are creating a tab called leads where the customer gets to store the details about the customer where they have shown interest. The lead creation via blueprint in zoho crm is illustrated in figure [4].
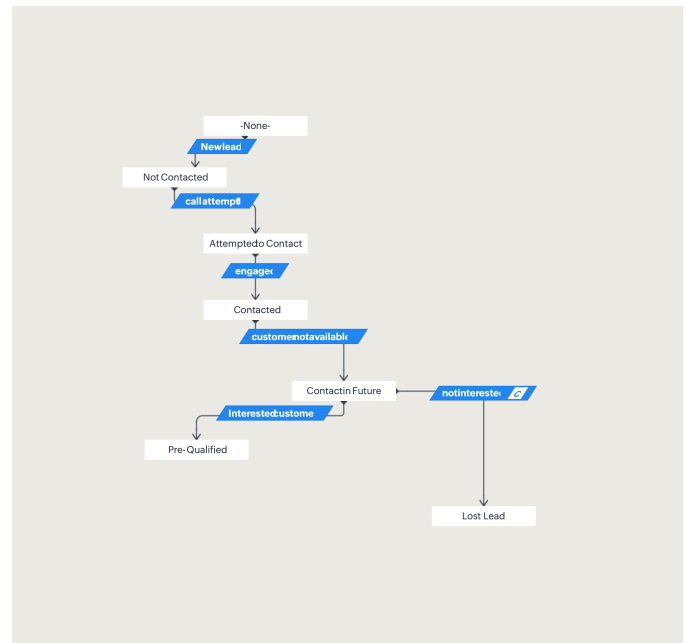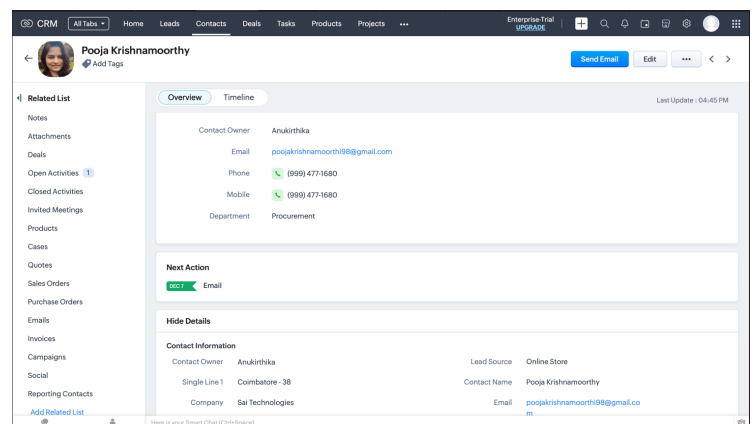

Fig. 5. Customer Profiling

2) **Contact**
   The term contact refers to an individual or point of contact of a company with whom the company that offers service or product has established the relationship. In our case for express mart the existing customers who already purchased the products are considered as contact as we have a relationship with them [5].

3) **Deal**
   The term deal refers to an opportunity that represents a potential sale with a customer. In our case with Express Mart, after running a series of campaigns customers might be interested in other products offered by Express Mart which it can be seen as an opportunity to do cross-selling[6].
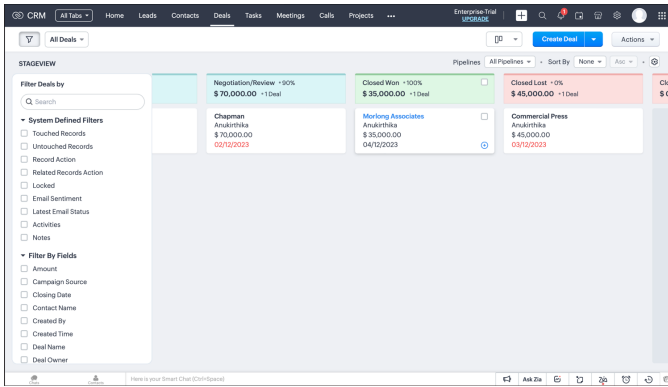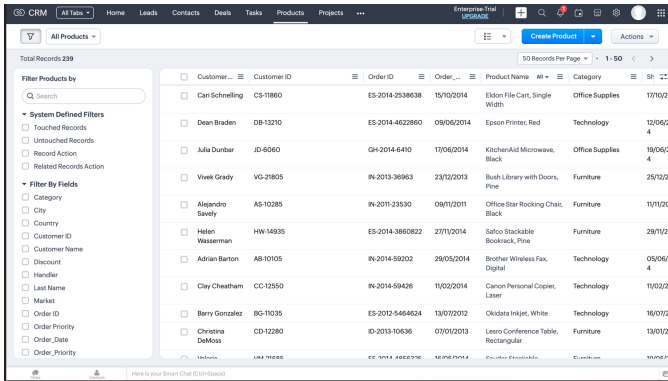
Fig. 6. Deal Tab - ZOHO CRM

Fig. 8. Dashboard - ZOHO CRM

Fig. 7. Product Tab - ZOHO CRM

Fig. 9. Sales Analysis- ZOHO CRM

C. Services

The Service module in Zoho CRM allows Express Mart to organize and streamline their product or service-related activities which track the status of the package and maintains the records of the orders concerning order id, customer id, shipment type, region, address, contact, type of product customer has purchased.In ZOHO CRM, we have product as a module which offers services which is shown in figure 7 Product Tab.

IV. ANALYTICS FROM CRM VIA ZOHO ANALYTICS

It allows businesses to analyze and visualize their data, create insightful reports and dashboards, and make informed decisions.

V. DASHBOARDS AND REPORTS

Dashboards are the interactive visual representation of organised data (which is the refined form of raw data CSV file after analysis) For Express Mart we have analysed our data with Zoho analytics and Power BI as well. We have given our brief analysis is Power BI for Express Mart and a key note analysis via Zoho analytics.
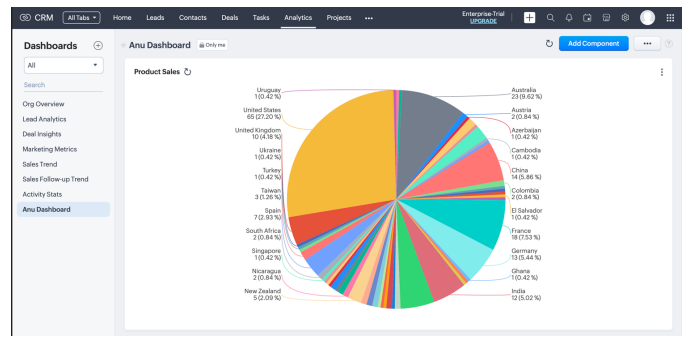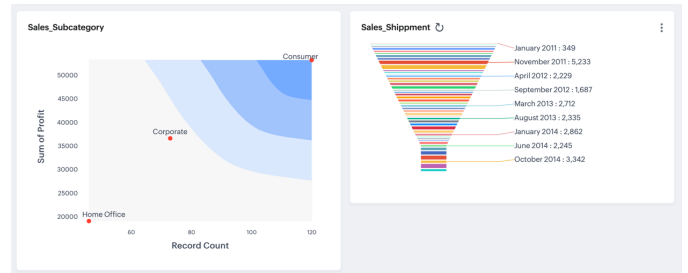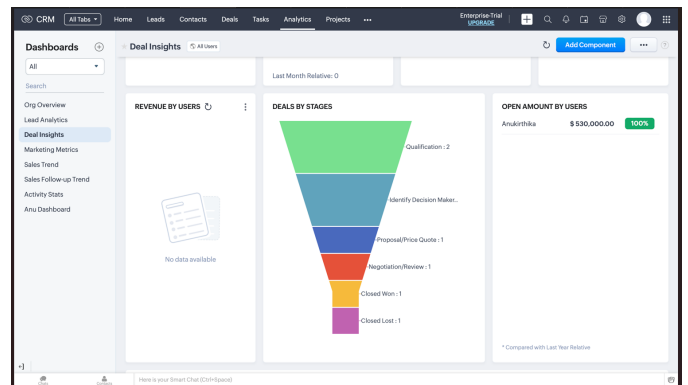

Fig. 10. Deals By stages - ZOHO CRM
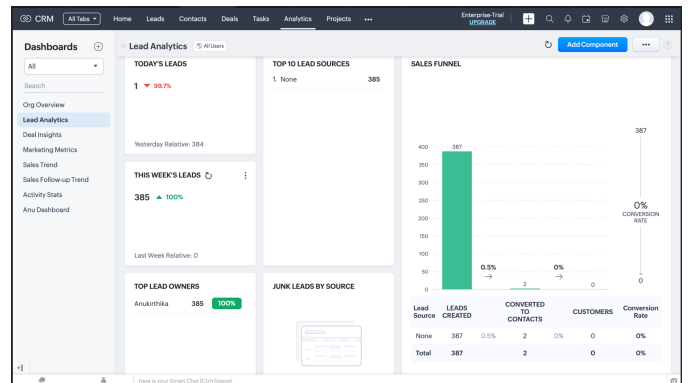
Fig. 11. Deals Funnel - ZOHO CRM
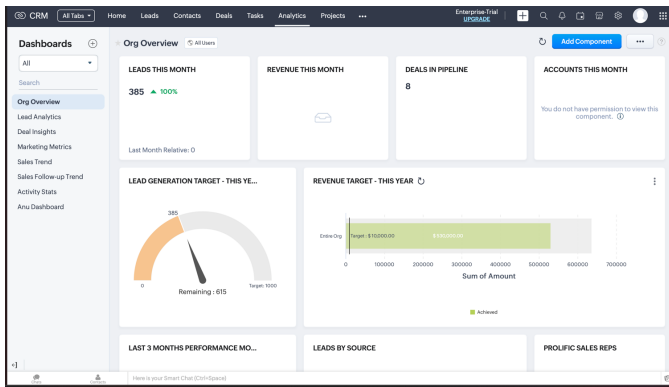
Fig. 12. Revenue Target of the year - ZOHO CRM

Fig. 13. ExpressMart Sales and Profit Analysis 1

The main use of a dashboard via Zoho Analytics is to show a comprehensive overview of the express mart data that has been provided by us via CSV file which comprises of order id, order date, date, product, id, category, subcategory, productname, sales, quantity, discount, profit, shipping, cost, order priority.

Dashboard Reporting Benefits:
- Provides at-a-glance visibility
- Saves time and resources
- Improves decision making
- Easy performance checks and balances
- Up-to-date progress evaluation

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Essentially, these dashboards stand as formidable tools for stakeholders to navigate and comprehend intricate datasets with efficiency. The incorporation of diverse visualizations ensures that information is communicated comprehensively and in an easily understandable manner. Ultimately, the overarching objective is to equip users with the ability to make well-informed decisions, address challenges in sales, and refine strategies to propel the success of the "ExpressMart store."

The diverse representations of data related to the "ExpressMart store" are illustrated below.

A. *EXPRESS MART SALES ANALYSIS*

Below Fig 13 gives a comprehensive overview on count of customers, orders, returns and products. Along with this, it provides insights on sales trend over year, we are comparing how the sales and profit are performing over year, considering
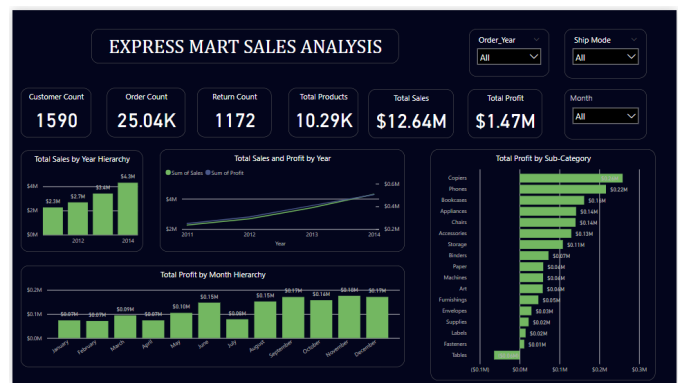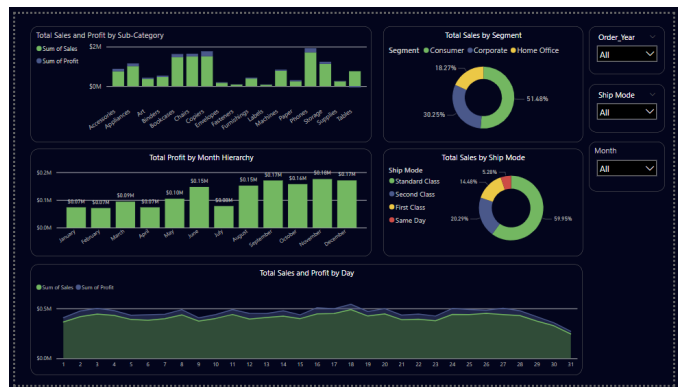

Fig. 14. ExpressMart Sales and profit Analysis 2

all 4 years month wise trend based on profit and subcategory wise profit gain.

We can observe that there is significant increase in the sales over years from 2011- 2014, however the profit growth has not seen good results. And the analysis on monthly profit reports that November month has highest profit followed by December and September having same amount of profit.

Again upon detailed analysis on sub-category-wise profit showed that copiers and phones are top selling and also has huge contribution to overall profitability.These analysis helps in identifying the key trends and helping to make decision for future sales and marketing strategies.

The report in Fig 14 reflects the sales and profit based on subcategory, along with the overall sales based on segment and ship mode. The result indicates that the consumer segment performed better than the corporate and home office segments in terms of sales. Additionally, it also depicts that the standard class ship mode has higher sales compared to other shipment modes.

B. *SALES AND PROFIT ANALYSIS*

This report in Fig 15 provides a visualization of sales and profit across different categories and subcategories. Evidently, the report highlights that the Technology category stands
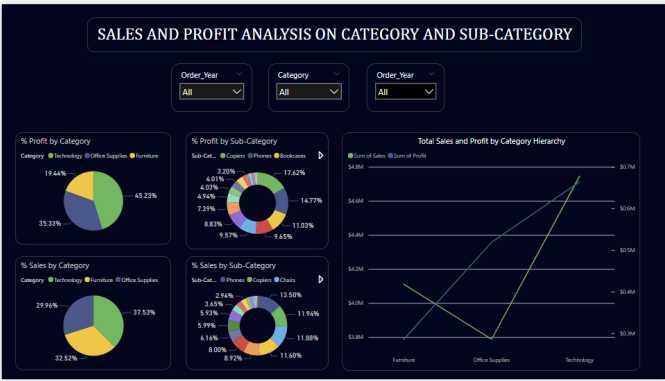
Fig. 15. Category and subcategory analysis

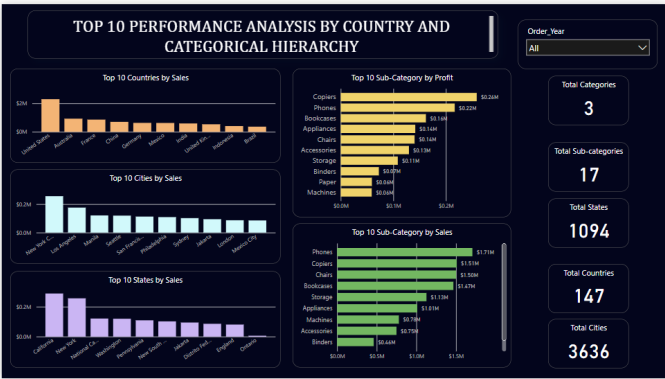Fig. 17. Geographical Analysis

Fig. 16. Category and subcategory analysis

out, showing higher sales by contributing 43.88 percent, surpassing the contributions of the Office Supplies and Furniture categories at 21.57 percent and 34.54 percent, respectively.

Further analysis on subcategories, proves that phones emerge as the top performer, boasting the highest sales and profit figures when compared to copiers and chairs. This signifies the prominence of the Technology category, particularly within the subcategories, in driving both sales and profit.

C. CATEGORICAL ANALYSIS

The Fig 16 report provides a detailed overview of the top 10 countries, cities, and states with respect to sales. The analysis shows the United States as the predominant driver of sales, reaffirming its significant economic impact. Within the United States, New York stands the top-performing city, showcasing remarkable sales figures. Additionally, the state of California demonstrates substantial sales contributions.

D. GEOGRAPHICAL ANALYSIS

The Fig 17 is a comprehensive report that provides a detailed overview of the top 10 countries ordered by return
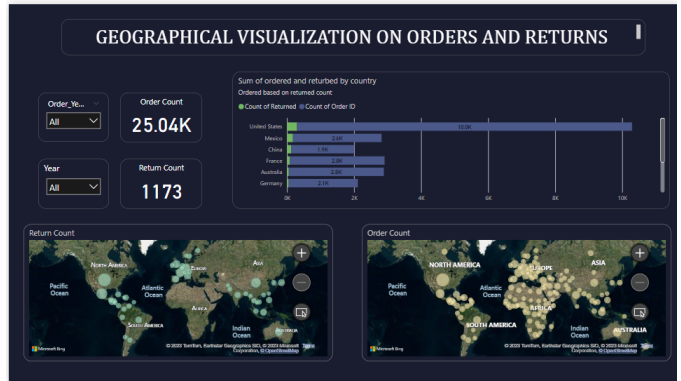
count in descending order and their respective order count. Along with geographical representation of countries with return and order count. When analysed over year the trend is not stable over year we have lost orders from certain countries and gained orders from some other. Which we can cope with by taking actions specified in gap analysis

This information is valuable for strategic decision-making, allowing stakeholders to focus on regions and locations that play a pivotal role in the overall sales performance. The breakdown of sales at the country, city, and state levels helps understanding geographic patterns, facilitating targeted efforts to capitalize on high-performing regions and optimize strategies for sustained success.

E. PRODUCT DISCOUNT ANALYSIS

This dashboard provides a comprehensive analysis of average discounts across the top 10 countries and the aggregated average of discounts by month and year. Notably, Kazakhstan emerges with the highest average discount at 0.70, followed closely by Zimbabwe and the United Arab Emirates. Among all 147 countries, the average discount spans from 0 to 0.70. The trend in the average of discounts exhibits that June and July month has highest discounts provided by considering all 4 years. This comprehensive report not only unveils insights into the discount landscape across countries but also sheds light on the temporal trends, facilitating understanding of discount dynamics over the specified period.

F. ORDER AND QUANTITY WISE ANALYSIS ON CATEGORY

This report provides a detailed analysis of orders and quantities based on category and subcategory. Undoubtedly, the Office Supplies category stands out with the highest order count at 8.9 K, compared to both Technology and Furniture, which holds 6.1 K and 3.8 K orders, respectively. Whereas for average discount Furniture with 0.29 stood out, outpacing Office Supplies and Technology. Also, the Sum of Quantity and Sales analysis reveals that Binders, with a quantity, holds
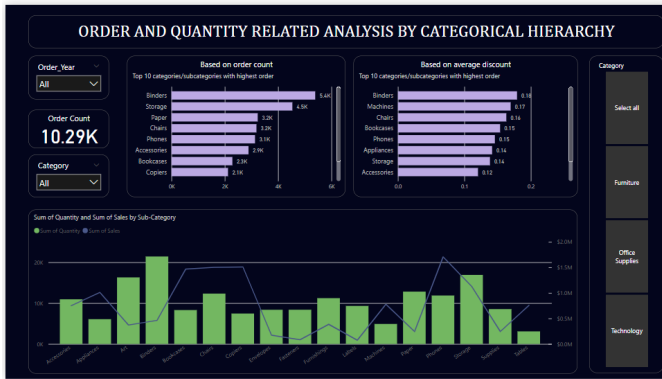
Fig. 18. Discount Analysis

Fig. 19. Order and Quantity based Sales analysis

the top position. The disparity between Sum of Sales and Sum of Quantity is most evident in the Phones subcategory, where Sum of Sales exceeds Sum of Quantity. This comprehensive report illuminates key insights into category and subcategory based on quantity, sales, order count and discount, enabling informed decision-making based on data patterns.

VI. **TEAM CONTRIBUTION**

In our team of three consultants, each team member has played an equal role in contributing to CRM development, Power BI report creation, and the preparation of specification and implementation documents. Through collaborative group discussions and analysis, we explored and uncovered valuable insights from the data.

Subsequently, we pooled our collective ideas and initiated the development of the CRM system and the creation of a data model for Power BI dashboards. Each team member was tasked with developing two dashboards, allowing for a diverse range of analyses. We then divided our analysis, engaging in discussions to align our viewpoints. This process led to a comprehensive gap analysis where we identified areas for improvement within the business.

Through constructive conversations, we outlined action items aimed at enhancing our strategies and addressing

any identified gaps. Overall, the contribution of each team member amounted to 33.33 percent out of 100, highlighting a balanced and collaborative effort towards the success of the project.

VII. CONCLUSION

Our foremost objective is to provide our client with valuable insights that can profoundly impact their business growth. To achieve this goal, we leveraged the capabilities of Zoho CRM to adeptly store and manage crucial information, spanning customer details, product information, and order data. The seamless integration of Power BI further enriched our analytical efforts by enabling the visualization of intricate dataset analyses. These visualizations offer actionable insights, serving as a guide for strategic steps to enhance overall business performance.

Having meticulously identified the root causes of existing challenges, we've laid a sturdy foundation for the implementation of effective solutions. In our analysis, we have outlined specific action items by scrutinizing the gaps between the current and desired states. The responsibility now rests with the client to execute the recommended strategies and solutions, empowering them to achieve successful and sustainable business growth.

Our approach underscores the significance of a collaborative effort, merging data-driven analysis with strategic implementation to attain optimal results. By fostering a partnership where insights derived from data are seamlessly integrated into strategic decision-making, we aim to empower our client to navigate the complexities of the business landscape with resilience and agility. This comprehensive strategy positions our client for continued success in the dynamic and ever-evolving business landscape.

VIII. **REFERENCES**

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