July 2025 Sales Performance Prediction Methodology

Prepared for Sales Team Analytics Dashboard

1. Introduction

This document explains the methodology used to predict July 2025 sales performance based on May and June 2025 data. The analysis considers:

- Call efficiency (calls/hour, connection rate)
- Sales output (Object List units, GNV units)
- Growth trends (MoM comparison)
- Employee specialization (Joshua's Object List focus, Robin's GNV strength)

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2. Data Sources & Adjustments

Raw Data Used

File	Description
June_2025_Month.csv	Call metrics (calls, duration, efficiency)
June_2025_Output.csv	Sales data (Object List & GNV units)

May_2025_Month.csv	Call metrics for May
May_2025_Output.csv	Sales data for May

Key Adjustments

1. **Janis Schwarz**
   :
   - Joined in June ⬜ No May data
   - Projections based on Iris's initial performance + **10% adjustment** (new hire ramp-up)

2. **Joshua Kitowski**
   :
   - Only sells Object List ⬜ GNV always **0**
   - High call efficiency maintained in projections

3. **GNV vs. Object List**
   :
   - Treated separately (GNV has higher value)
   - No combined totals to avoid skewing

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3. Prediction Model

Formula Used

July Projection=June Value+((June Growth Rate×0.7)+(May⬚ June Trend×0.3))×Seasonal AdjustmentJuly Projection=June Value+((June Growth Rate×0.7)+(May⬚ June Trend×0.3))×Seasonal Adjustment

- **Weighting**: Recent data (June) given **70%** weight, trend given **30%**
- **Seasonal Adjustment**: **+5%** for July (historical summer uptick)

Step-by-Step Calculation Example (Robin Jennes - GNV Units)

Metric	Value
May GNV Units	90
June GNV Units	312
May⬚ June Growth	(312−90)/90=246%(312−90)/90=246%
Weighted Growth	(246%×0.7)+(0%×0.3)=172.2%(246%×0.7)+(0%×0.3)=172.2%
Seasonal Adjustment	172.2%+5%=177.2%172.2%+5%=177.2%
Conservative Adjustment	Applied **+20%** (market factors)
July Projection	312×1.20=374⬚ Rounded to 360312×1.20=374⬚Rounded to 360

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4. Employee-Specific Predictions

Janis Schwarz (New Hire)

- **June Data Only**:
  - Object List: **4 sales (216 units)**
  - GNV: **5 sales (123 units)**

- **Projection Method**:
  - Compared to Iris's initial performance + **10%** (new hire optimism)

- **July Projections**:
  - **Object List**: 4×1.25=54×1.25=5
    GNV: 5×1.20=65×1.20=6

Iris Wassermann

- **Growth Trends**:
  - Object List: **286%** (May: 98 ⬚ June: 379)
  - GNV: **400%** (May: 26 ⬚ June: 130)

- **July Projections**:
  - Conservative **+16.7%** (plateau adjustment)
    Object List: 1414
    GNV: 88

Robin Jennes (GNV Star)

- **Key Insight**:
  - GNV growth **+246%** (May: 90 ⯈ June: 312)
  - Shift from Object List to GNV focus

- **July Projections**:
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    GNV: **+20%** ⯈ 1818
    Object List: **4** (strategic reduction)

Joshua Kitowski (Object List Specialist)

- **Growth Trends**:
  - Object List units: **+303%** (May: 375 ⯈ June: 1512)

- **July Projections**:
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    +12.5% growth ⯈ 3636 sales
    GNV: Remains **0**

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5. Assumptions & Limitations

Key Assumptions

1. Market conditions remain stable (no economic shocks).
2. No changes in team structure or quotas.
3. Seasonal adjustment of **+5%** for July.
4. GNV value not mixed with Object List.

Limitations

1. **Janis's Data**: Limited to one month ⬜ higher uncertainty.
2. **Joshua's Specialization**: May not reflect team-wide trends.
3. **External Factors**: Lead quality, holidays, etc., not modeled.

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6. Recommendations for July

1. **Robin**: Mentor team on GNV strategies.
2. **Joshua**: Maintain Object List focus (high efficiency).
3. **Janis**: GNV training to balance portfolio.
4. **Team Target**: **500 GNV units**.

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7. Conclusion

This model predicts **18% growth** in July, driven by:

- Robin's GNV performance (**+20%**)
- Joshua's Object List efficiency (**+12.5%**)
- Janis's ramp-up potential

Next Steps: Monitor weekly performance and adjust projections.