

Opportunity Tracking Data Dictionary

Goal:

The goal of this data analytics project is to gain insights into a software company's sales channels, with a focus on the direct and partner sales channels. The analysis aims to provide actionable information to sales managers, enabling them to optimize sales strategies, resource allocation, and revenue generation.

Data Description

Filename: Opportunity Tracking.xlsx

Tables:

[Opportunity Tracking.xlsx]Account!: 4 columns 357 rows

[Opportunity Tracking.xlsx]Fact!: 13 columns 487 rows

[Opportunity Tracking.xlsx]Opportunity!: 5 columns 486 rows

[Opportunity Tracking.xlsx]Partner!: 3 columns 101 rows

[Opportunity Tracking.xlsx]Product!: 2 columns 25 rows

[Opportunity Tracking.xlsx]Sales Stage!: 3 columns 5 rows

Size: 82,011 bytes

Schema

[Opportunity Tracking.xlsx]Account!

Account: Account name

Region: one of Central, East, or West

Segment: one of Large, Small & Medium, or Strategic
Account ID

[Opportunity Tracking.xlsx]Fact!

EstimatedCloseDate:

Opportunity ID: reference table in Opportunity sheet

Sales Stage ID: reference table in Sales Stage sheet

Account ID: reference table in Account sheet

Partner ID: reference table in Partner sheet

Product ID: reference table in Product sheet

ProductRevenue: this is a salesperson's estimate of what he believes the revenue will be

FactoredProductRevenue: Revenue Probability; which is determined by the deal's current Sales Stage

Create Date: Date sales process was initiated. [May be in the number of days from Excel epoch.]

Opportunity Days: Estimated duration of sales process. EstimatedCloseDate - Create Date

Year: Year of estimated close date

Month_Number: Month of estimated close date

__Month: Month of estimated close date in %b format

[Opportunity Tracking.xlsx]Opportunity!

Name: name of deal

Opportunity ID:

Rank: rank of deal size

SizeID: code of deal size as classified by salesperson

Opportunity Size: size classification of deal as determined by sales person

[Opportunity Tracking.xlsx]Partner!

Partner: name of partner

Partner ID:

Partner Driven: whether channel is partner-driven or not

[Opportunity Tracking.xlsx]Product!

Product Code: product name

Product ID:

[Opportunity Tracking.xlsx]Sales Stage!

Probability: probability that deals in this stage of the sales process will be closed

Sales Stage: descriptive name of sales stage

Sales Stage ID:

Possible questions to be solved:

- How does revenue compare between the direct and partner sales channels?
- Which channel contributes the most opportunities and revenue?
- Are there specific regions where one channel outperforms the other?
- What are the regions that generate the highest revenue for each sales channel?
- Are there untapped regions with growth potential for specific channels?
- What are the conversion rates for opportunities to closed deals for each channel?
- Which channel has a higher success rate in converting opportunities?
- Are there significant variations in the sales cycle duration?
- Is there an optimal channel mix that leads to higher revenue overall?
- Which channels are complementary, and which ones might compete?
- Which partners are consistently driving the most revenue?
- Are there specific deal size and region combinations that show potential?
- How does customer segmentation (industry, company size) impact channel effectiveness?
- Are there seasonal patterns in opportunity creation and revenue generation for each channel?
- How can the company align sales efforts with these trends?

By answering these questions and uncovering these insights, the software company's sales managers can make informed decisions to optimize sales performance, enhance resource allocation, and maximize revenue generation through the direct and partner sales channels. Best of luck!!!