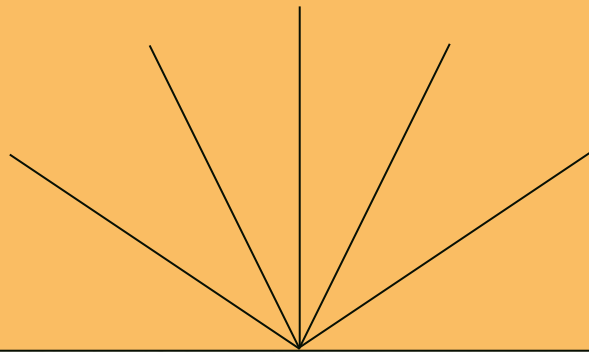
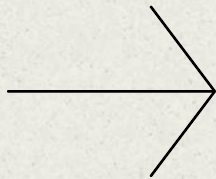


# CRM & Sales Analysis

Domain: Customer Relationship  
Management and Sales  
Function: Sales Performance Optimization  
and Revenue Forecasting



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# PROBLEM STATEMENT

A company aims to evaluate its CRM data and sales pipeline for leads registered over the last five months. The task is to build a comprehensive analytic report that provides insights into lead distribution across countries, industries, and organization sizes. The report assesses the health of the sales pipeline, forecasts potential income over the next few months, and compares sales agent performance.



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# OBJECTIVE

The primary objective of this CRM data and sales pipeline analysis is to provide actionable insights that will optimize sales performance, improve lead conversion rates, and enhance revenue forecasting accuracy. Specifically, I aim to:

1. Identify top-performing sales agents and analyze their strategies for potential replication across the team.
  2. Evaluate lead conversion rates across different countries, industries and agents to target high-potential markets.
  3. Assess the health of the sales pipeline month-over-month, focusing on lead progression through the sales funnel.
  4. Analyze the impact of response time on conversion rates to optimize lead engagement strategies.
  5. Examine trends in average deal values and factors influencing them.
  6. Develop a robust forecasting model for potential income in the coming months, considering current pipeline data and historical trends.
  7. Investigate the relationship between organization size, sales cycle duration, and deal value to tailor sales approaches.
  8. Compare the effectiveness of sales strategies for different product types, particularly SAAS versus other offerings.
  9. Identify factors influencing sales cycle duration across various dimensions (country, industry, agent).
  10. Analyze characteristics of lost opportunities to develop strategies for improving closure rates.
-



# Tools Used

Analytical & Visual:

- Microsoft Power BI

Presentation:

- Microsoft power point





# DATASET OVERVIEW

**Data source:** FP20

**Time period:** 2024

**Data size:** crm\_data(3000,17)

**Key columns:**

**Actual Columns:** country, Deal Value, \$, Industry, Organization size, Owner, Lead acquisition date, Product, Status, Stage, Deal Value \$ ,Probability, % Expected close date Actual close date

**Dax/Calculated columns:** response time, sort\_index, customer\_conversion\_rate, win\_rate, response\_time, show\_metrics

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# PRIMARY INSIGHTS

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Total  
Revenue

**\$425.39k**

Conversion  
rate

**86.17%**

Win rate

**2.77%**

Average  
lead time

**63.17**

Top revenue  
generating sales  
agent

**Laura  
Thompson**

Forecasted revenue  
on Jun 2024

**\$60.17k**

Total lost  
customer

**61**

Most accurate  
close day sales  
agent

Jessica  
Martinez



# SECONDARY INSIGHTS

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# Key Findings

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This analysis provides a comprehensive overview of the company's sales performance, focusing on various aspects such as total revenue, conversion rate, win rate, agent performance, customer stage, status and monthly trend with forecast. The data reveals a total revenue figure of \$425.37k with a conversion rate of 86.17%. Top revenue generating agent is Laura. However, the company faces a significantly low win rate of 2.77% and probability of losing a customer is 40%

**Key findings also include:**

1. Forecasted July sales: \$60.17K.
2. Germany leads with a 88.10% conversion rate, followed by Netherlands at 87.78%. Portugal has the highest average response time.
3. Most customers are in the opportunity state. Churned and disqualified customers combined are more than double the current customer base.
4. Custom solutions have the highest customer conversion rate and average deal value .
5. Median response time is higher for churned customers.
6. Organization size affects both sales cycle duration and deal value.
7. March saw the highest number of leads .

Jessica Martinez is the most accurate in forecasting, despite a 105 day average error. John Smith has the highest win rate of 5.02%.Kevin Anderson has the highest conversion rate of 88.33%

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# Recommendations

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## **To improve performance, the company should:**

1. Implement strategies to move customers from the opportunity state to active customers more efficiently.
  2. Develop a targeted retention program to reduce the high number of churned and disqualified customers.
  3. Analyze top performers sales techniques and implement best practices across the team.
  4. Implement a rapid response system, particularly for high-value opportunities.
  5. Analyze and replicate successful practices from the German market in other countries.
  6. Develop targeted strategies for different organization sizes, considering their impact on sales cycle and deal value.
  7. Set a goal to significantly improve the current low win rate of 2.77% through targeted training, improved lead qualification, and enhanced sales processes.
  8. Implement a comprehensive customer retention strategy to address the 40% probability of losing a customer.
  9. Conduct regular check-ins with current customers to ensure satisfaction and identify upsell opportunities.
-



\$425.39K 86.17% 2.77% 63.17 Laura Thompson

Total revenue (Customer)

Conversion Rate

Win rate

Average Lead time (in days)

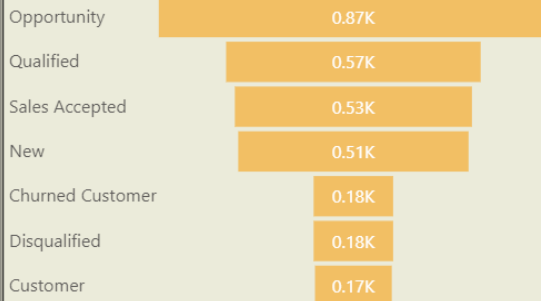
Top Revenue generating Sales Agent

What are the conversion rates for leads to paying customers in different countries?



Germany has the **highest** conversion rate of **88.10%**.  
Spain has the **lowest** with **84.13%**

How many customers are in each Status?

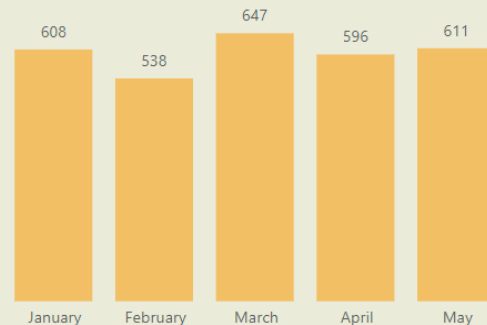


**Most** of our customer is in **opportunity state**.  
**Churned and disqualified** customers combinedly are more than **double** than our **current customer**.

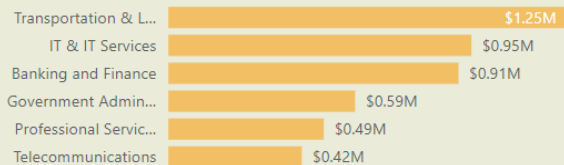
Overview

Detailed Insights

What is the monthly lead trend?

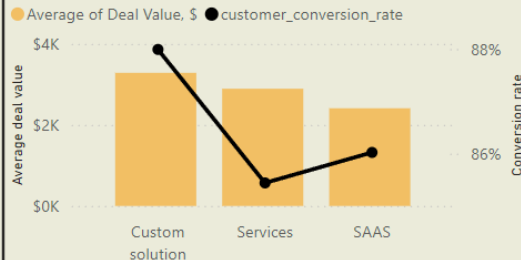


How does the sales performance vary across different industries?

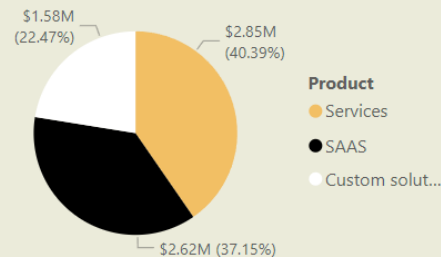


**Top 4** industry generate **more than half million** revenue.  
**Professional service** is only **0.01 million** behind.

How effective are sales strategies for different products offered?



What is the breakdown of deal value by product?



\$60.17K

Forecasted sales (Jun 2024)

40

Deal Probability  
for Lost customer

\$3.28K

Average deal value  
for lost customer

61

Total lost customers

Filter

☒ Country

☐ Industry

☐ Sales Agent

Metric

☒ Average deal Value

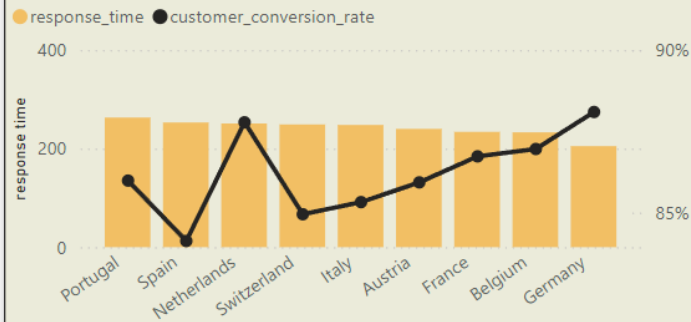
☐ Count of customer

☐ Probability

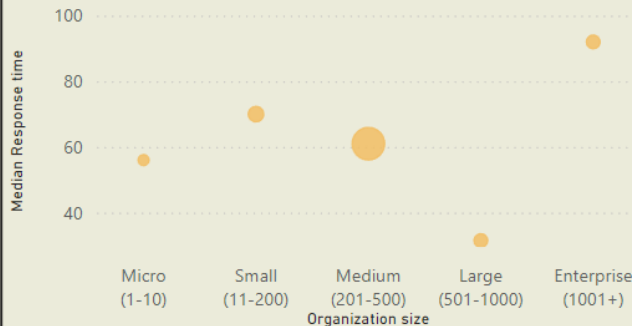
Overview

Detailed Insights

Does response time effect conversion rate?



Does the size of the organization affect the sales cycle duration and deal value?

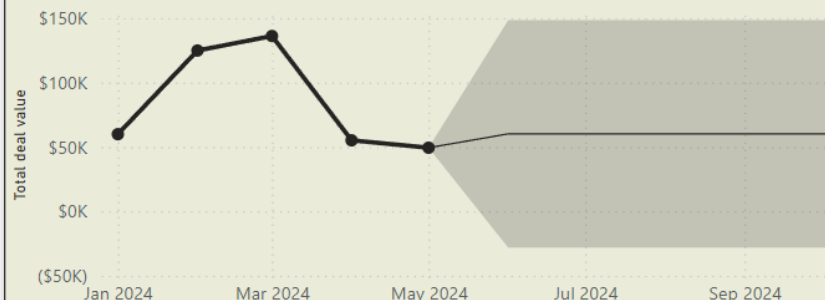


What is the average response time for each status?



For both churned and current customer average response time is almost similar. **But median response time is higher for churned customers.**

What is the monthly revenue trend with forecast?



As per forecast sales in Jun will be higher than

Sales Agent Performance

Owner	Average close date accuracy	customer_conversion_rate	win_rate
Kevin Anderson	126.61	88.33%	2.08%
Sarah Davis	187.07	87.55%	3.21%
Laura Thompson	128.11	87.32%	2.80%
Jessica Martinez	105.97	86.89%	2.15%
Emily Johnson	128.03	84.73%	2.91%
Michael Brown	140.83	84.68%	2.69%
David Wilson	123.06	84.19%	1.71%
John Smith	137.93	84.17%	5.02%
Total	131.27	86.17%	2.77%

Highest win rate - John Smith. Highest conversion rate - Kevin Anderson. Most accurate - Jessica Martinez

How Do Average deal Value of Lost Customers Vary Across Country ?

Country	Metric
Austria	3,635.67
Belgium	3,238.50
France	2,267.44
Germany	3,525.10
Italy	2,791.53
Netherlands	2,170.33
Portugal	5,060.56
Spain	1,453.50
Switzerland	3,960.00
Total	3,280.57



# Thank you!!!

—Amanat Mahmud

