CRM Sales Dashboard

Manager: All

Quarter: All

Stage: All

Total Deals
8.8K

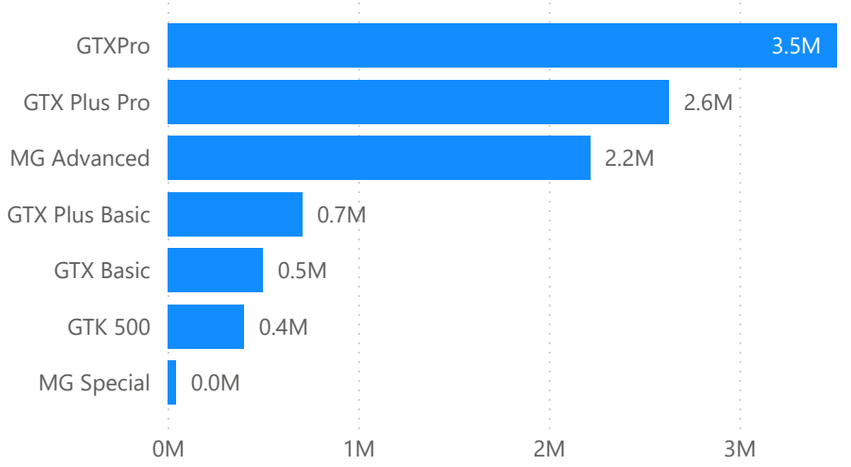
Total Revenue
$ 10M

Deal Won
4K

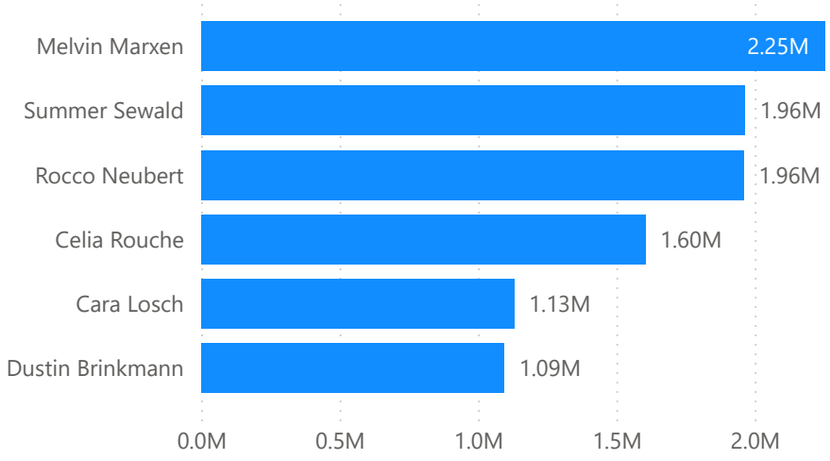
Deal Lost
2K

Win%
48.2%

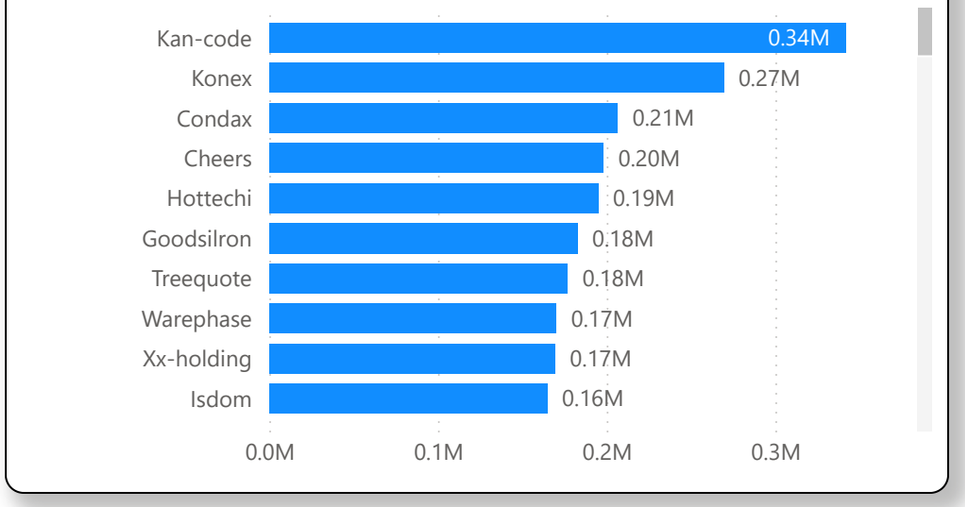
Sales by Product



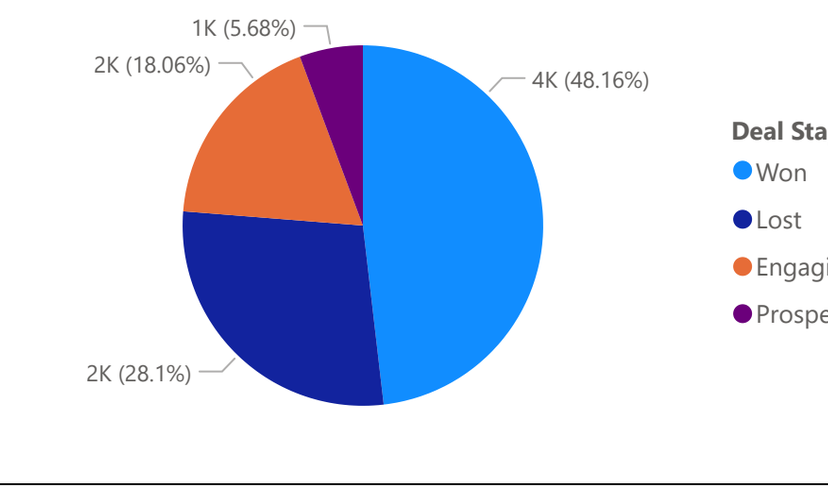
Sales by Manager



Revenue by Client



Deals by Stage



CRM Sales Dashboard

About the Project:-

CRM Sales Opportunities

The data contains B2B sales opportunities from a CRM database for a fictitious company that sells computer hardware, including information on accounts, products, sales teams, and sales opportunities.

They've been using a new CRM system to track their sales opportunities but have no visibility of the data outside of the platform.

In an effort to become a data-driven organization, you've been asked to create an **interactive dashboard that enables sales managers to track their team's quarterly performance**.

Solution:-

Data Modeling:- We have developed star schema for our Data model, a new Date table is created for the purpose of Date wise insights.

Dashboard: - The Dashboard contains 4 report pages. Each Page has a report level filter for Manager, Quarter and Stage.

Executives/Team Leaders can explore the dashboard by manager, region to see how each manager is performing.

Key Findings: -

- Melvin, Summer Sewald, and Rocco Neubert are the top 3 Managers by Total Revenue.
- GTXPro, GTX Plus Pro and MG Advanced accounts for most sale.
- Kan-code, Konex, Condax are the top 3 Clients by reveue.
- Retails, followed by Technology and medical amount of max sales.
- Total Win% is around 48%.

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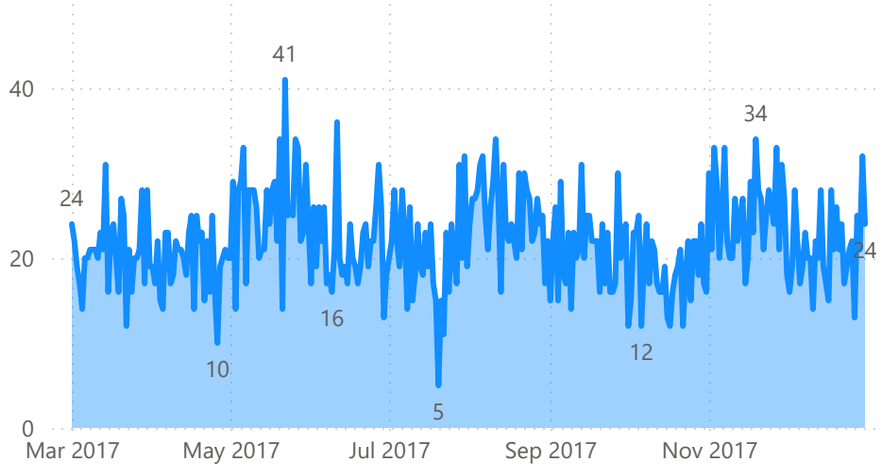
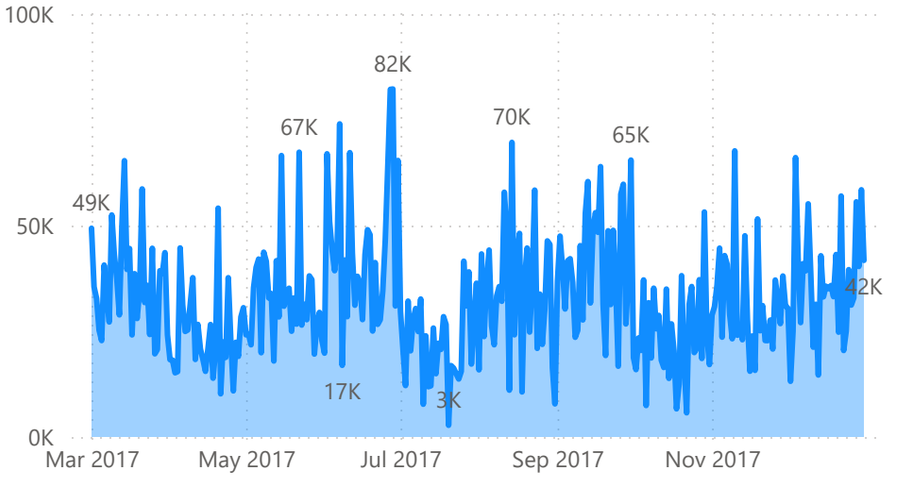
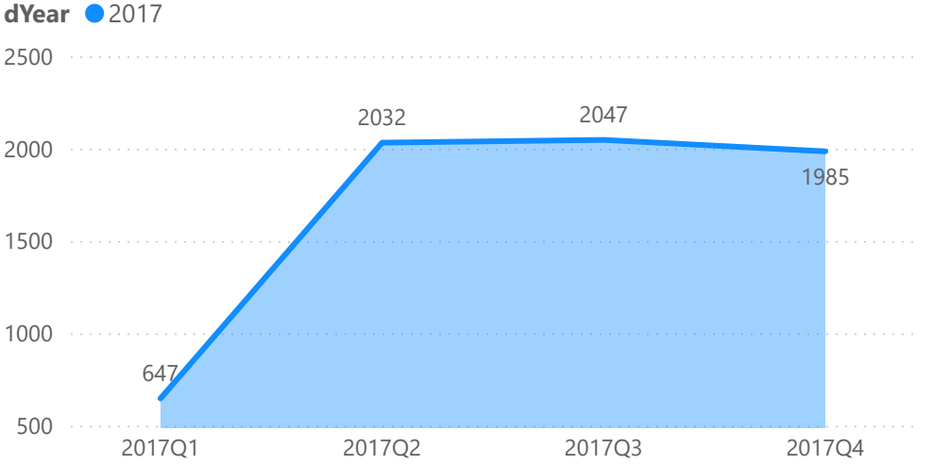
Deals by Month



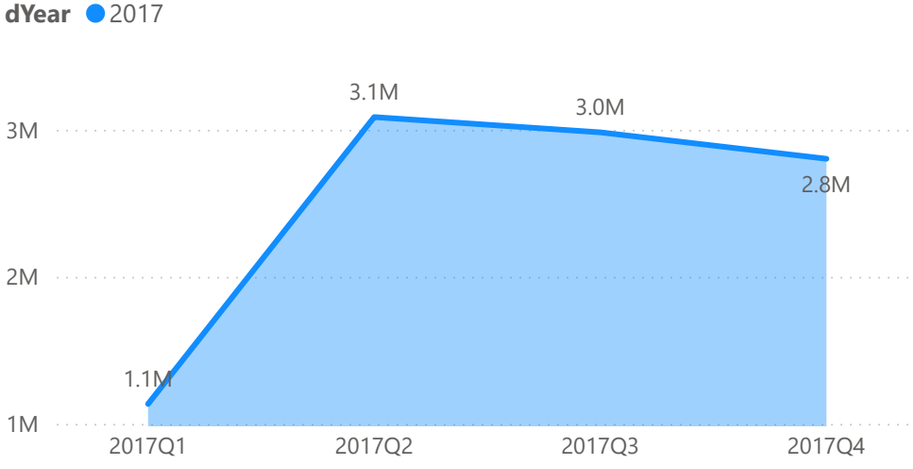
Revenue by Month



Deals by Quarter



Revenue by Quarter



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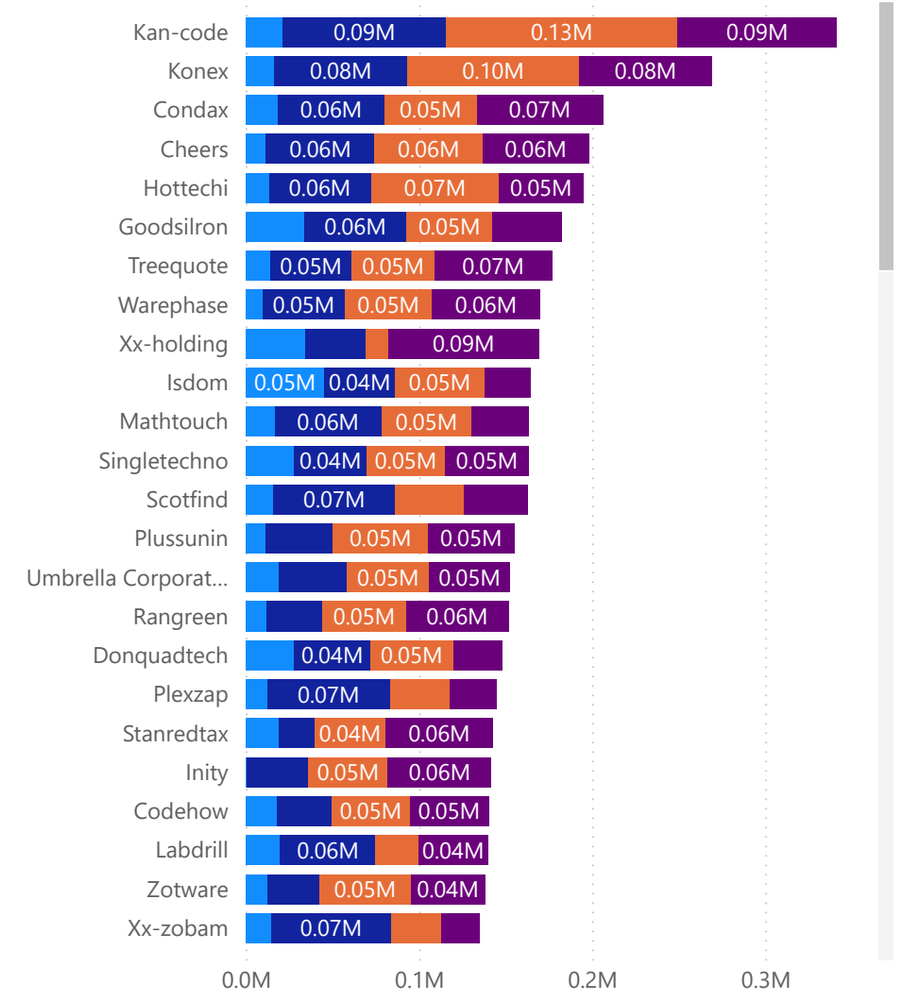
Revenue by Client



Sales by Manager

CRM Sales Dashboard

Manager: All | Quarter: All | Stage: All

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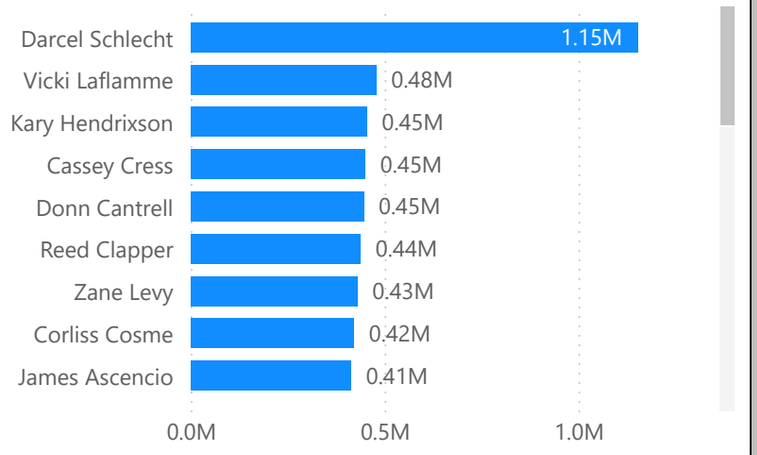
$ 10M

Deal Won
4K

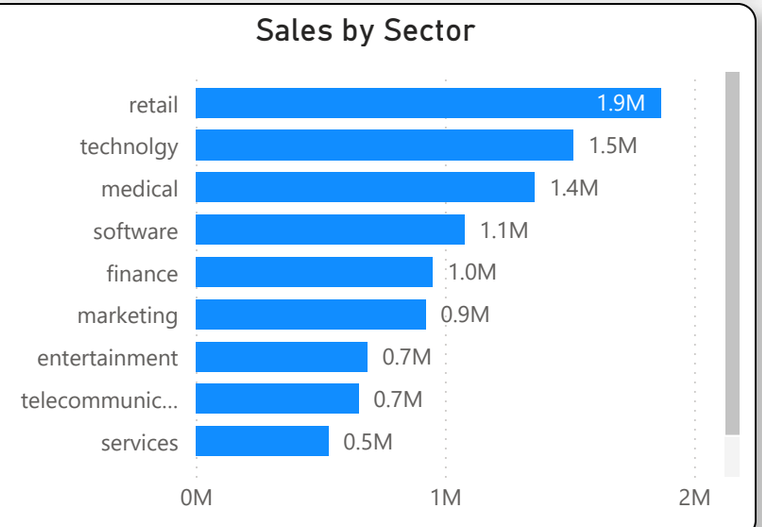
Deal Lost
2K

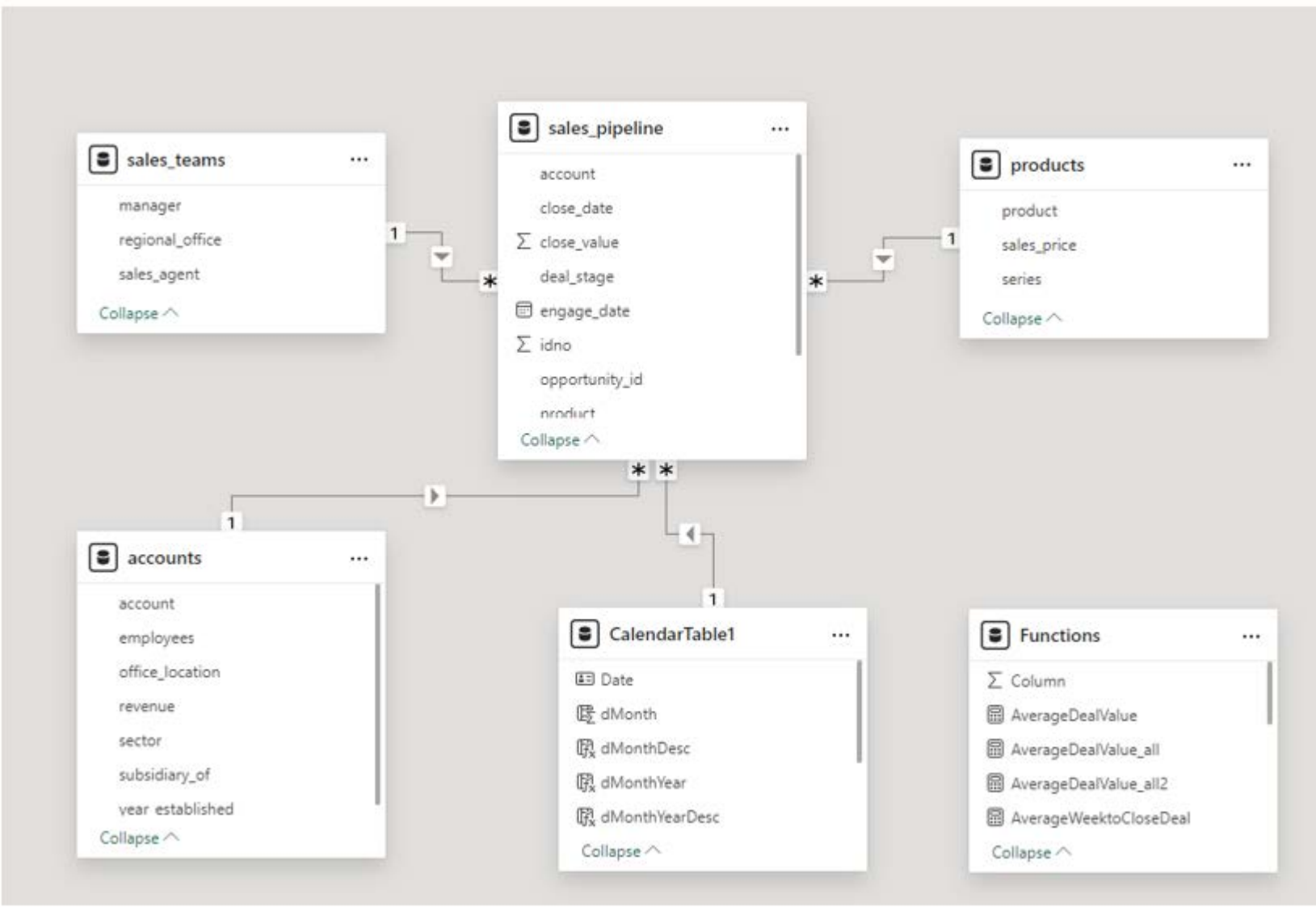
Win%
48.2%

Agent	Deal Won %	Deal Won	Total Revenue	Average Deal Value
Anna Snelling	46.43%	208	275,056	818.62
Boris Faz	48.10%	101	261,631	1,710.01
Cassey Cress	47.11%	163	450,489	1,726.01
Cecily Lampkin	52.71%	107	229,800	1,436.25
Corliss Cosme	48.39%	150	421,036	1,838.59
Daniell Hammack	44.02%	114	364,229	1,947.75
Darcel Schlecht	46.72%	349	1,153,214	2,085.38
Donn Cantrell	57.45%	158	445,860	1,621.31
Total	**48.16%**	**4238**	**10,005,534**	**1,490.92**



Product	Deal Won %	Deal Won	Total Revenue
GTXPro	49.26%	729	3,510,578
GTX Plus Pro	49.48%	479	2,629,651
MG Advanced	46.32%	654	2,216,387
GTX Plus Basic	47.22%	653	705,275
GTX Basic	49.04%	915	499,263
GTK 500	37.50%	15	400,612
MG Special	48.03%	793	43,768
Total	**48.16%**	**4238**	**10,005,534**

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close_value
deal_stage
engage_date
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series
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sector
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