

MAVEN TECH QUARTERLY SALES ANALYSIS

PROJECT OVERVIEW

Use case

1. Visualize customer sales to take actions on high or low performing managers and sales agents
2. Understand the business opportunities conversion to sales
3. Analyze the top and worst performing products
4. Average days to win a business

Questions answered

1. Who are the top performing sales managers and sales agents and who are not performing well for both current and previous quarters
2. How are the products performing / winning to sales
3. What are the quarterly sales trends and how is this compared to previous quarters
4. Difference between no. of opportunities vs sales conversion
5. What is the average number of days to close/win/convert an opportunity to sales

Techniques used

1. Graph visualizations
2. Use of reference labels, color indicators in KPI cards
3. Tree map and scatter plot visualizations
4. Combination of bar charts and matrix labels
5. Top N selection and summarization of visuals based on the selection
6. Dynamic titles
7. Custom tool tips
8. Creative buttons
9. Quarter on Quarter measures
10. Custom labels based on values

MAVEN TECH QUARTERLY SALES ANALYSIS

Manager

All

Year

2017

Won Sales \$

\$2.8M

Average Sales Value \$

\$2.3K

Average Days to Close

6.62

New Opportunities

1165

Product

All

Quarter

Qtr 4

Last Quarter \$3.0M

-6 %

Last Quarter \$2.4K

-1 %

Last Quarter 6.42

1 %

Last Quarter 2770

-58 %

Sales Funnel

Won

\$1.83M

Lost

\$1.28M

Quarterly Sales

Deal Stage

Lost

Won

\$0M

\$2M

Qtr 1

Qtr 2

Qtr 3

Qtr 4

\$0.94M

\$3.22M

\$3.18M

\$3.11M

Product wise Sales and Conversion

| Product | Conversion | # Opp | Won Sales \$ |
|----------------|------------|-------|---------------|
| GTXPro | 62% | 200 | \$958,491 |
| GTX Plus Pro | 63% | 143 | \$795,530 |
| MG Advanced | 58% | 183 | \$619,162 |
| GTX Plus Basic | 54% | 178 | \$193,447 |
| GTX Basic | 63% | 257 | \$139,659 |
| GTK 500 | 43% | 3 | \$83,377 |
| MG Special | 63% | 232 | \$12,830 |
| Total | 60% | 1196 | \$2,802,496.0 |

No. of Opportunities vs Sales \$

Sales \$

\$0.4M

\$0.5M

\$0.6M

200

300

400

No. of Opportunities

Cara Losch

Celia Rouche

Rocco Neubert

Dustin Brinkmann

Summer Sewald

Melvin Marxen

Manager Sales

| Manager | Conversion | # Opp | Won Sales \$ | Avg Sale Value \$ | Avg Days to Close |
|------------------|------------|-------|---------------|-------------------|-------------------|
| Cara Losch | 59% | 137 | \$311,148.0 | \$2,271.2 | 6.69 |
| Celia Rouche | 62% | 179 | \$430,212.0 | \$2,403.4 | 6.43 |
| Dustin Brinkmann | 63% | 213 | \$316,994.0 | \$1,488.2 | 6.99 |
| Melvin Marxen | 56% | 243 | \$670,788.0 | \$2,760.4 | 6.25 |
| Rocco Neubert | 58% | 175 | \$513,705.0 | \$2,935.5 | 6.84 |
| Summer Sewald | 65% | 249 | \$559,649.0 | \$2,247.6 | 6.66 |
| Total | 60% | 1196 | \$2,802,496.0 | \$2,343.2 | 6.62 |

Analysis by Manager, Sales Agent & Product

Manager

Melvin Marxen

Sales Agent

Darcel Schlecht

Product

GTX Basic

Opportunity

Sales

\$3,109,921

Melvin Marxen

\$560,190

Summer Sewald

\$557,732

Celia Rouche

\$554,964

Dustin Brinkmann

\$537,117

Rocco Neubert

\$524,214

Darcel Schlecht

\$183,712

Marty Freudenburg

\$133,807

Gladys Colclough

\$114,263

Jonathan Berthelot

\$65,654

Niesha Huffines

\$62,754

MG Advanced

\$40,716

GTK 500

\$26,768

GTX Plus Basic

\$23,016

GTX Basic

\$4,950

MG Special

\$550

6BSKCQCX

\$550

9PG07FPP

\$550

ANNUH4KM

\$550

IYU5CGUM

\$550

J6TNURHV

\$550