MEMORANDUM

TO: John (Soft Skillet Team Santa Barbara)

FROM: Bruno Vitali, Data Analyst

DATE: 02/20/25

SUBJECT: Exploratory Analysis of Sales Call Data and Recommendations for Restaurant Acquisition Improvement

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1. Executive Summary

- Key Finding 1: **The Connection Challenge is Real, but Addressable:** Our initial exploration reveals that **only half of our calls connect (48.6%)**. This underscores a significant opportunity to **expand our reach and maximize every contact attempt**. Improving this rate is a critical first step in increasing our sales opportunities.
- Key Finding 2: **Pitch Matters - "AI Seating" and " Smooth " Resonate, "Operator" Needs to Evolve:** The data tells a clear story: **not all pitches are equal**. **"AI Seating" emerges as a rising star**, generating the only genuine engagement ("Engaged"). **"Operator" shows solid potential**, prompting deferrals for future consideration ("Deferred to Other").
- Key Finding 3: **Managers, the Hidden Opportunity - "Reversion" is Key:** Calls to "Managers" that are initially unsuccessful are not the end of the road. There is a **tangible "turnaround" opportunity**. Many "Managers" defer the decision ("Deferred to Other"), indicating a gap that we can leverage with smart, personalized follow-up or switching salesforces point of view reaching to the owners.

- Key Recommendation 1: **Strategic Focus on Winning Pitches and Script Refinement:** We recommend **directing most of our efforts toward "AI Seating" and " Smooth Revenue" pitches**, refining our scripts to highlight their strengths. In parallel, **let's take a deep look at " Operator "**, looking at how to revitalize your message or refocus it to a specific niche.
- Key Recommendation 2: **Empower the Team with Pitch-Specific Objection Management:** To convert initial interest into real engagement, **let's equip our salespeople with objection management "toolkits"** tailored to each pitch. Anticipating and responding to queries is crucial to moving the conversation forward.
- Overall Goal/Projected Impact: **Towards Accelerated Soft Skillet Adoption:** Implementing these recommendations, combined with ongoing A/B testing, will allow us to **increase success rates at every stage of the contact, from initial connection to customer engagement**, thereby accelerating Soft Skillet adoption and our sales growth in Santa Barbara.

2. Introduction

Hello Team, I'm Bruno, Soft Skillet's new Data Analyst, and I'm here for us to work together using the power of data to **take our restaurant software strategies in Santa Barbara to the next level**.

In this memo I present to you my **exploratory analysis with the most recent sales call data provided to me, by the company**. I believe our objective is clear and straightforward, however I would like to talk to you to get your feedback and adjust the reports I will provide, we can **discover actionable insights that allow us to react quickly and apply strategies to improve our team's effectiveness and ultimately drive Soft Skillet sales**.

I firmly believe that **data is part of the compass that will guide us to success, the other part we must build together!** Let's get to the analysis which I am sure will be just the beginning of a continuous journey of **optimization and growth.**

3. Data Exploration and Analysis

    Data Description:

- I analyzed an initial dataset containing records of sales call activity from September 2024. This dataset, although limited in size, provides a valuable **window into the dynamics of our interactions with restaurants in Santa Barbara**. It includes crucial information such as the activity ID (to differentiate those customers who are contacted more than once), the date of the call, the person in charge or owner of the business ("Person"), whether or not the call connected ("Call Connect"), the pitch used for the sale, the final disposition ("Disposition") of the customer, the final outcome of the call ("Outcome")
- To facilitate a quick and efficient analysis in this exploratory phase, I **initially used Google Sheets to identify general trends and patterns**. Subsequently, for more precise calculations I used Python data analysis libraries, finally to present the graphs and finalize some adjustments using **Power BI.**

    Call Connection Analysis: The First Hurdle: Initial Connection

- **Overall Connection Rate: Only 63.4% of the calls manage to connect**. This data, although initial, **alerts us to an area for immediate improvement**. Less than half of our contact attempts are even opening the door to conversation, it is important to know that the days we generally get the least response to our calls are Mondays (the status is set to "unknow").
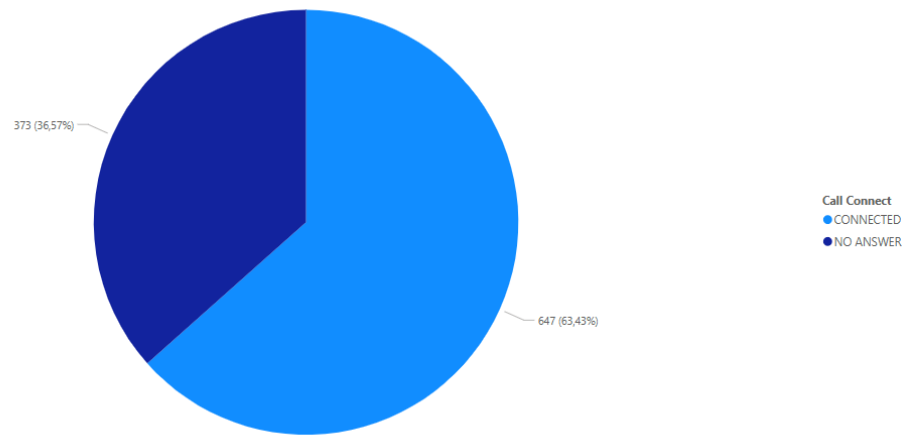
Graph 1 (Total calls by connection)
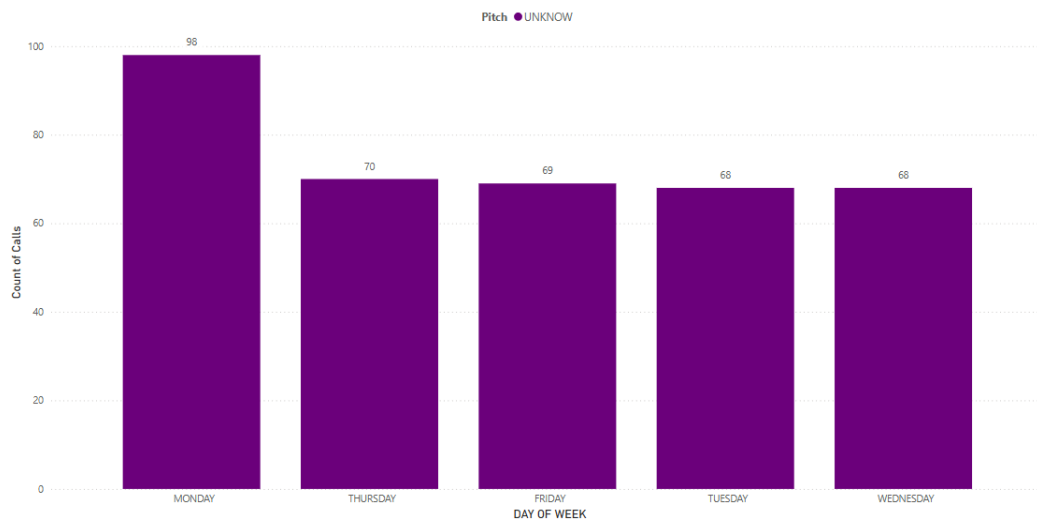
Graph 2 (Count of unanswered calls per Day of the week)

- Connection Rate, results of connection and variation by "Person" Type: It is observed in the graph that during the time analyzed there are 365 customers who could not be contacted even though the call was made, it would be interesting to know if they were contacted by other means (mailing, face-to-face visit) to include them in the follow-up, the list will be delivered as a complement to the presentation, on the other hand there are 165 customers who are in open status, of which I would also like to know what is the next strategy (I guess referred to other stakeholders, but I would like confirmation). Finally, of the 424 customers who appear as lost, I would like to go deeper into them since we have a metric that plays in our favor to reverse their decision.
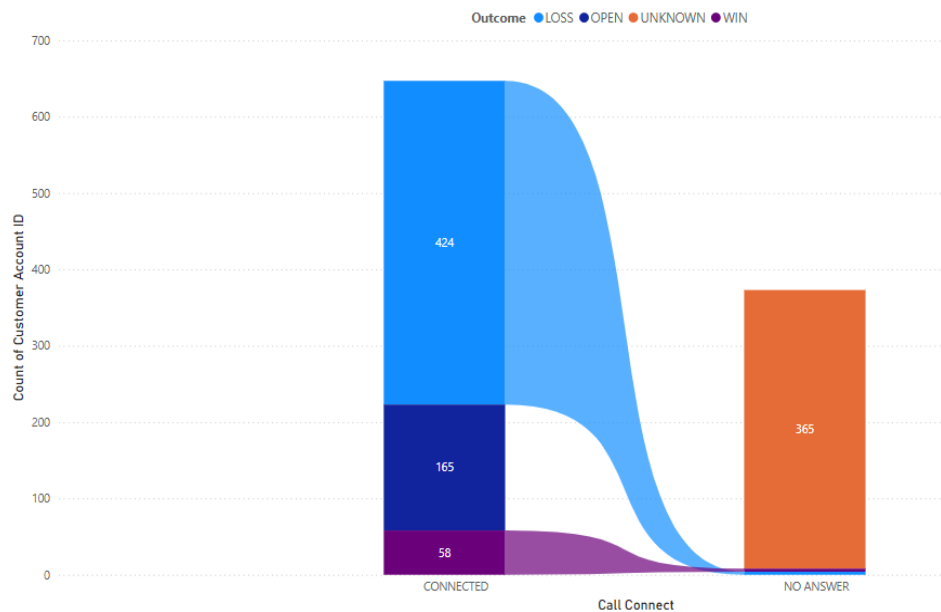
Graph 3 (Count of customer accounts by connection result)

- As I mentioned, the opportunity for improvement is that there is a large number of "lost" customers who are managers, however if we can convince or expand our strategies to reach the owners, we could reverse some losses and convert them into sales, since the percentage of customer managers who make purchasing decisions are considerably lower than the owners who make the decision to purchase our software and on the other hand are those who are most identified with "lost" accounts in the outcome of the call. This may no doubt be because they are the specialist decision makers, but I believe that a mix of good pitching and marketing to reach the restaurant owners could increase our chances. We can review the option with the marketing team to scale this idea.
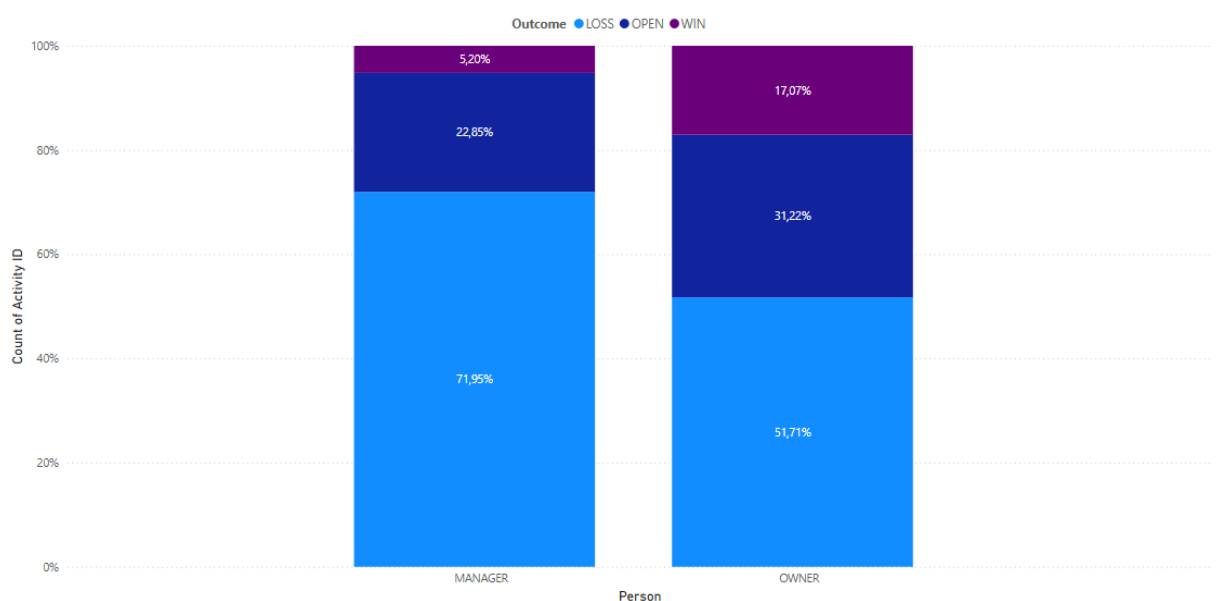

Graph 4 (Call count per caller and final customer outcome)

- Connection Rate by "Pitch", call connect and Outcome vs Disposition: Connection rates are better when we evaluate the Pitch AI. At this point 2 metrics were created, one called Success Rate and the other Relative Success rate, the main difference is that the relative one shows us those calls that were in engaged status, unlike the success rate that is absolute with those customers that are already in Outcome Win (with whom there is not much room for improvement), however, with those in Engaged status, We have had a success rate of 30% with the AI pitch, 27% with the Smooth pitch and 19% with the pitch operator, **so it would be interesting to be able to appeal to a more accurate detection of customers to approach them with one of the 2 pitches**, which are directly related to the absolute success rate where also the AI pitch has had a better performance than the other two. The challenge remains the generation of a segmentation kit, which allows to approach customers in a much more specific way.
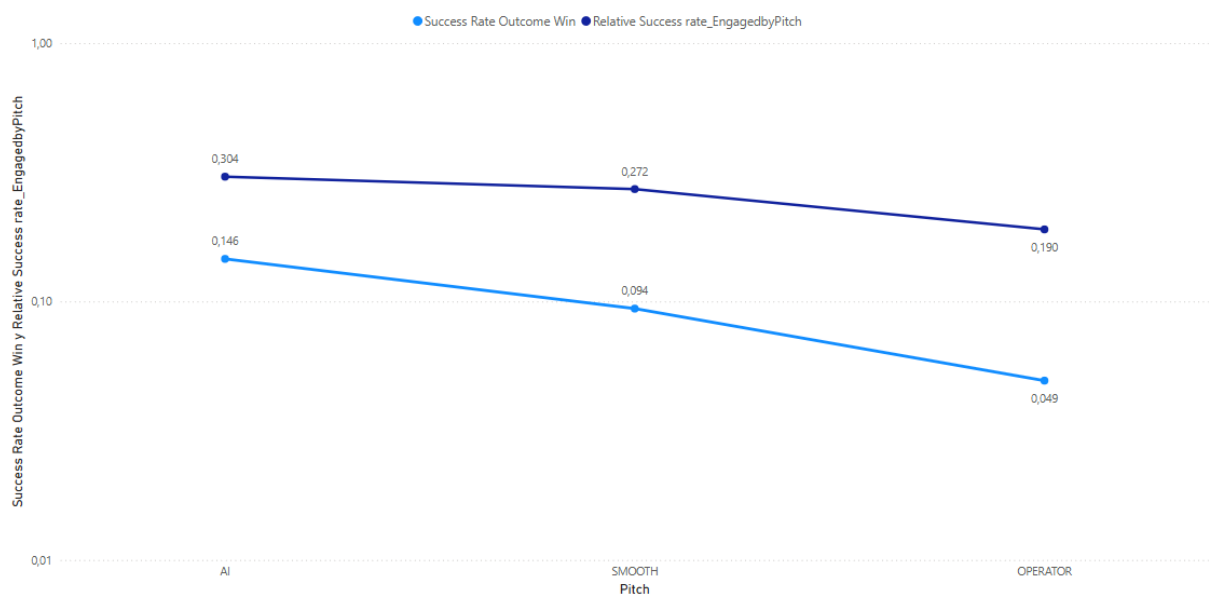
Graph 5 (Success rate by Pitch (Call==Connect, Outcome == Win) vs Relative success rate by pitch (Call==Connect, Disposition == Engaged)

- Operator Pitch: The Relationship Builder. The "Operator" **pitch** does not achieve an immediate "Engaged", however it **leads with 56.3% of the total contacts made in the Deferred to Other Stakeholders" customer disposition**. This shows a great opportunity, since this **pitch, with its focus on understanding the manager, manages to keep the conversation open and generate *potential* interest, although not an immediate commitment**, a strategy that we must manage very well in a scaled way to continue with an attractive sales funnel for the customer, at this point it is crucial that we use this **"relationship builder pitch"** to know the customer more in depth, and direct efforts to recognize their maximum pain to be able to adjust the sales angle to each profile.
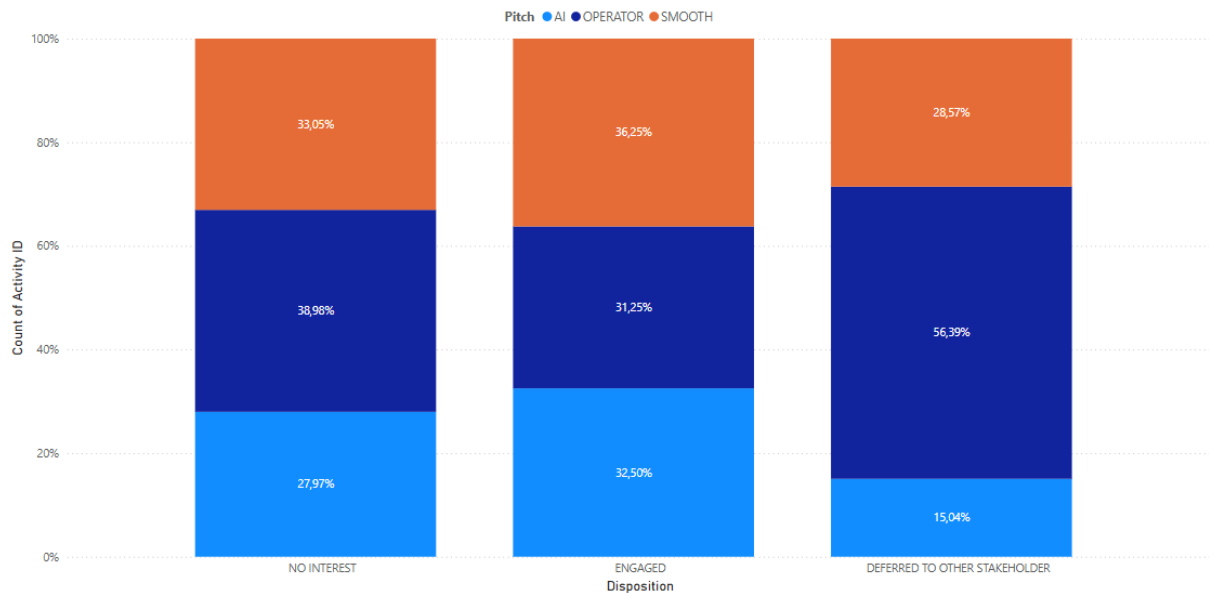
Graph 6 (Count of activity by Disposition and Pitch)

5. Recommendations and Action Plan

- **Prioritize and Refine Pitch Strategies:**

  - **Recommendation 1: Focus Primarily on "AI Seating" and "Smooth" Pitches.**
    - **Suggested Action Plan:**
      - Sales Team Training
      - Develop Pitch-Specific Sales Scripts
      - Create Pitch-Specific Marketing Materials
  - **Recommendation 2: Re-evaluate and Potentially Re-focus or Re-design "Operator Revenue" Pitch.**
    - **Action Plan:**
      - Qualitative Deep Dive
      - Refine "Operator Pitch" by implementation of decision threes
      - Segmented Targeting of Pitch: first managers after Owners
      - A/B Testing of Re-designed Pitch vs. Alternatives marketing segmentation for Managers and Owners
  - **Recommendation 3: Strategies for Reverting Unsuccessful Calls to Managers:**
    - **Action Plan:**
      - Segmentation for Prioritized Follow-up
      - Personalized Follow-up with Value-Added Content
      - Define Follow-up Timing and Frequency
      - Sales Team Training on Reversion Strategies

      - Implement ongoing A/B testing to evaluate new call strategies and refine messaging.

      - Implement alternative outreach methods for unconnected leads, such as email follow-ups and in-person visits.

- **Enhance Data Collection for Future Analysis:**

  - **Recommendation 1: Expand Data Collection to Restaurant Demographics and Call Details.**
    - Justification based on data limitations for granular analysis.
    - **Specific Data Points to Collect:**
      - Restaurant Type
      - Restaurant Size
      - Restaurant Location Details
      - Call Duration
      - Specific Objections Raised
      - Contact Information Source
    - **Action Plan:**
      - Collaboration with Sales and Operations and Marketing
      - Implement Simple Collection Mechanisms (Principally Forms (customers and sales force
      - Privacy and Compliance Considerations

      - Develop an interactive dashboard to provide real-time visibility into key sales metrics, enabling data-driven decision-making

      - Create predictive models to assign the most effective pitch based on restaurant profiles.

6. Conclusion

As this initial analysis demonstrates, data is our most powerful ally in optimizing Soft Skillet's restaurant acquisition efforts. **This findings reveal immediate opportunities to enhance performance by strategically focusing on "AI Seating" and " Smooth Revenue " pitches, refining "Operator" and leveraging reversion strategies for Manager calls.** By embracing a data-driven approach and continuously refining our strategies based on insights like these, we can **empower our sales team to achieve new levels of effectiveness, accelerate restaurant adoption, and build a culture of continuous improvement at Soft Skillet.** This is just the beginning of our journey. Let's commit to leveraging data to guide our path to sustained success and market leadership in Santa Barbara and beyond.

Attachments

Methodology (Analysis Approach)

- **Phase 1: Problem Understanding and Initial Planning**

  1. Case Study Reading
  2. Problem Definition
  3. Requirements Segmentation
  4. Documentation Analysis
  5. Objectives Calendarization

- **Phase 2: Data Acquisition and Understanding**
  1. Database Download
  2. Data Understanding
  3. Initial Data Structure Analysis
  4. Exploratory Data Analysis (Initial EDA)
  5. Audio Listening

- **Phase 3: Data Preparation and Cleaning**
  1. Data Cleaning
     - Blank and Null Values Review
     - Empty Cells Standardization
     - Nulls (Unknow) Standardization
     - Uppercase Standardization
  2. Data Processing and Restructuring
     - Data Conversion
     - Day Extraction (from Date)
     - Double Check Nulls (Unknow)
     - Standardization
     - Null Values Double Check
     - Key Metrics Calculation
     - Rates Calculation
     - Max, Min, by Category and Group Values Calculation
     - Data Visualization in Google Sheets (Initial and Rapid)
     - Data Visualization in Power BI (Advanced and Dynamic)
     - Panda to DAX Logic Transformation
     - Processed Data and Calculations Verification
     - Creation of Dashboard

  3. **Phase 4: Analysis, Interpretation, Recommendations and Communication**
     - Key Questions Formulation

     - Dialogue with AI (Sonnet, Gemini Advanced, Qwen)

     - Memo Elaboration