Tracking Running Totals

Business Problem: Tracking Sales Quota Progress over Time

The sales team works diligently to sell the product, and they have quotas that they must reach in order to earn all of their commission. Because these goals are so intimately tied to revenue, the manager of the team wants to track each sales member’s performance throughout the year. You suggest a % pf quota reached metric that could be displayed on a dashboard, but the sales manager expresses her concern that a single metric won’t give her visibility into their progress throughout the year. You suggest providing a Running Total of sales revenue and a percentage quota metric that will be recalculated every time a sales member makes another sale.

Task:

Calculate the running total of sales revenue, running total, and the % of quota reached, for each sales employee on each date they make a sale.

A diagram of a data model

Description automatically generated

A screenshot of a computer screen

Description automatically generated

SQL Query:

Select

    SalesEmployeeID,

    SaleDate,

    SaleAmount,

    SUM(SaleAmount) Over(Partition By SalesEmployeeID order by SaleDate) Running\_Total,

    cast(SUM(SaleAmount) Over(Partition By SalesEmployeeID order by SaleDate) as float)/Quota as Percent\_Quota

From

Sales as s

join

Employees as e

on S.SalesEmployeeID = e.EMPLOYEEID

Order By SalesEmployeeID, SaleDate

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