

Feb 16
**20
23**



CLIENT:

YELLEVATE
ELEVATING YOUR BUSINESS TO NEW HEIGHTS!

Business Report

Group 37

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ABOUT US

We are a group of knowledgeable, professional, and fully remote data analytics students from Refocus. Working to improve how businesses use their data, we make sure that clients have the information they need to make wiser choices.

VISION

Our vision is fully defined by a simple but comprehensive phrase: We develop the world through data and data analytics.

MISSION

We work alongside our clients to make the most favorable decisions when it comes to their business.

THE PROBLEM

Client has been struggling with customer disputes and according to statistics, roughly **20%** of the disputes brought up against **YELLEVATE** resulted in a payment opt-out, which has caused an annual income loss of about **5%.** (in USD).

TOTAL DISPUTES

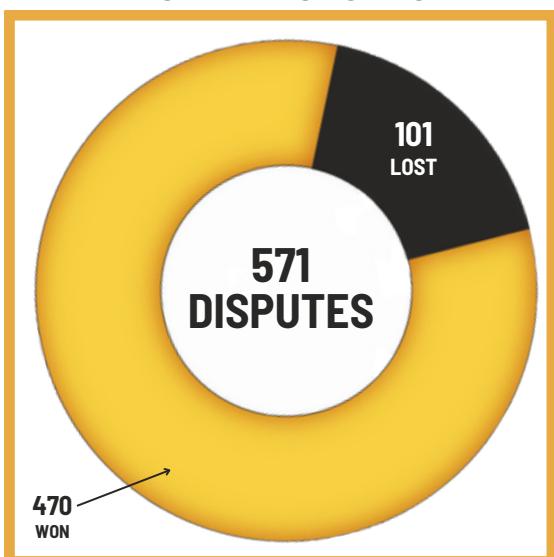


fig. a

ANNUAL INCOME LOSS

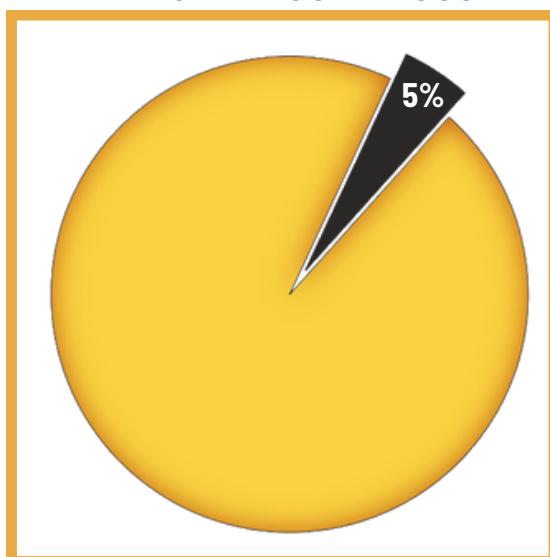


fig. b

A total of **571 customer disputes** over a period of three years resulted in **470 cases** being won against customers and **101 cases** being lost, resulting in a revenue loss of about **\$690,000.** (*fig. a, fig. b*)

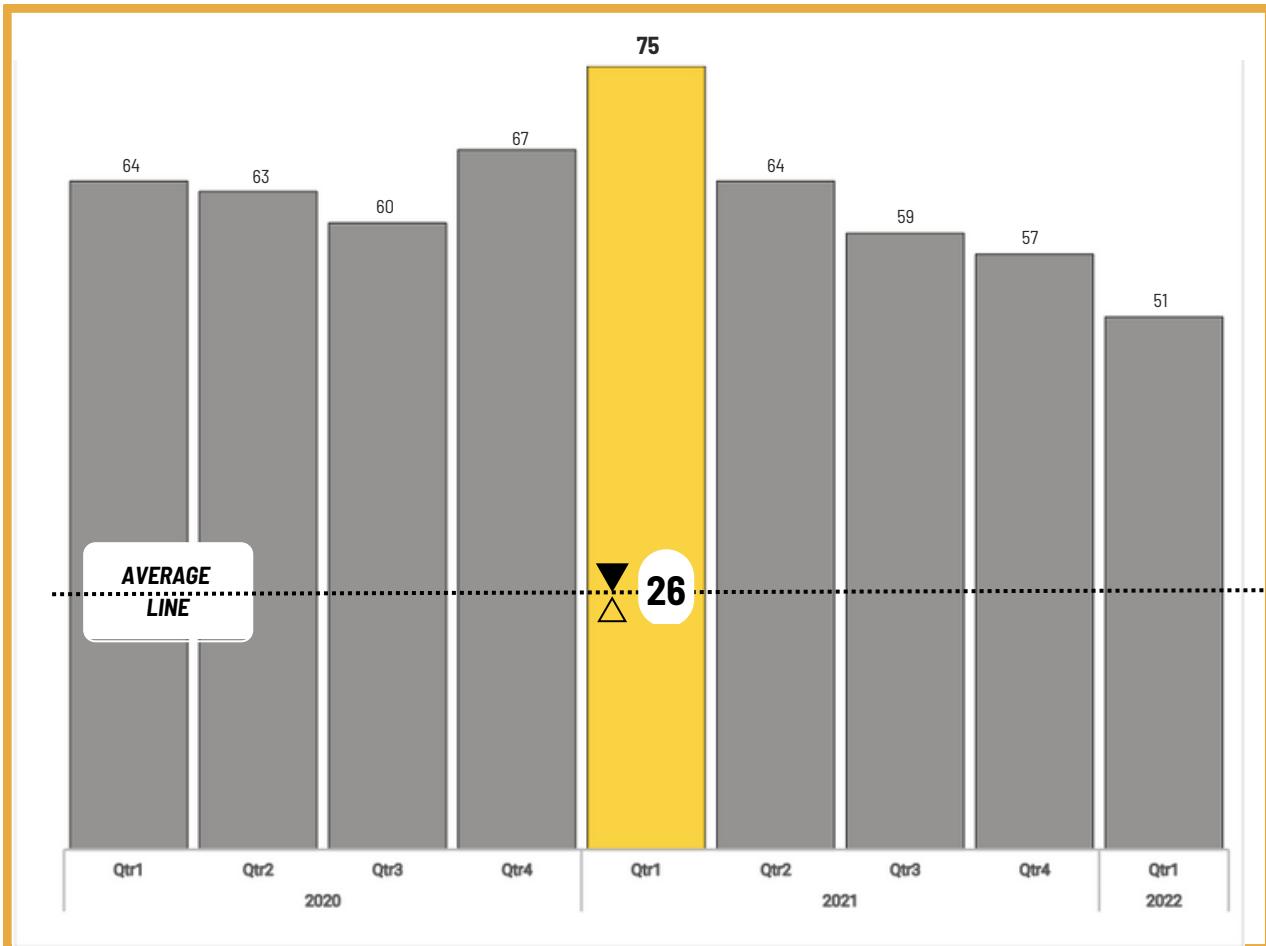
METHODOLOGY

Our team was reached out by Yellecate, and defined to us their needs for their companies' growth. Upon collection of data, our team reviewed and began cleaning the data thru pgAdmin using SQL. After the cleaning process we have verified that there were no null values in the given dataset.

Our team have also utilized pgAdmin to analyze also the given dataset to which we have exported the results to Microsoft Excel for Data Visualization

FINDINGS

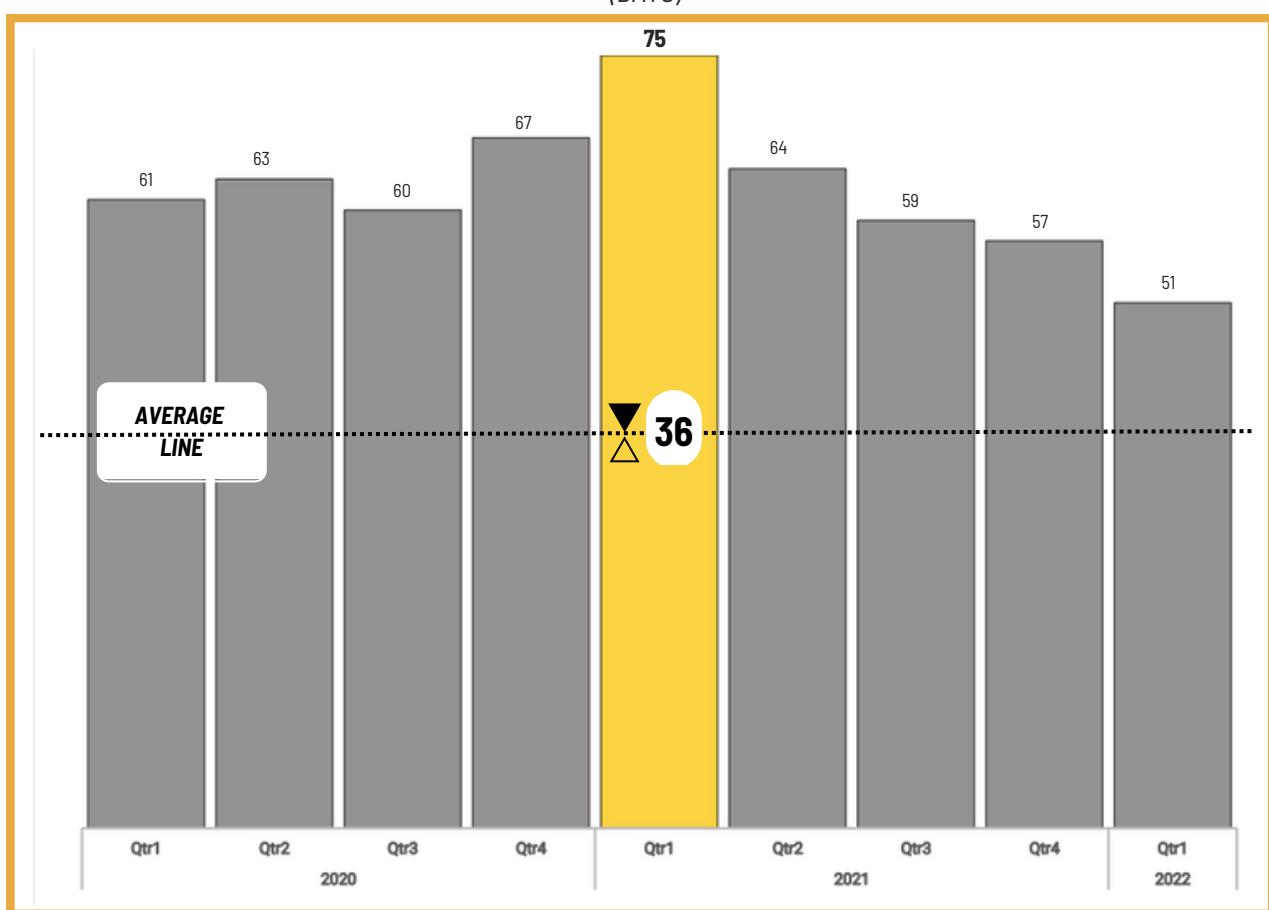
TIME TO SETTLE ALL CUSTOMER INVOICES (DAYS)



1. Invoice processing is a crucial part of the financial operations of any business. It involves a lot of manual effort, which can be time-consuming and costly. With the longest processing time for an invoice being 75 days, and an **average of 26 days to settle all invoices** is also indicative of the need for more efficient processes.

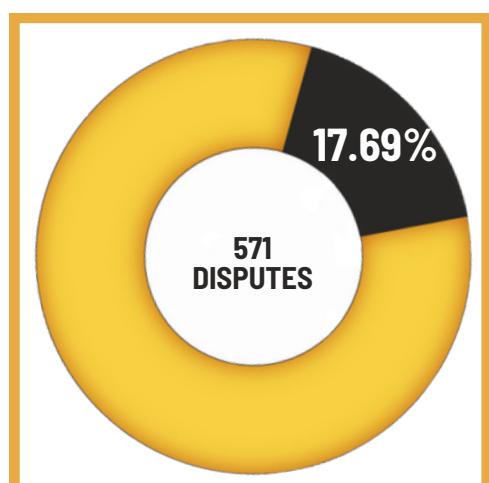
TIME TO SETTLE DISPUTED CUSTOMER INVOICES

(DAYS)



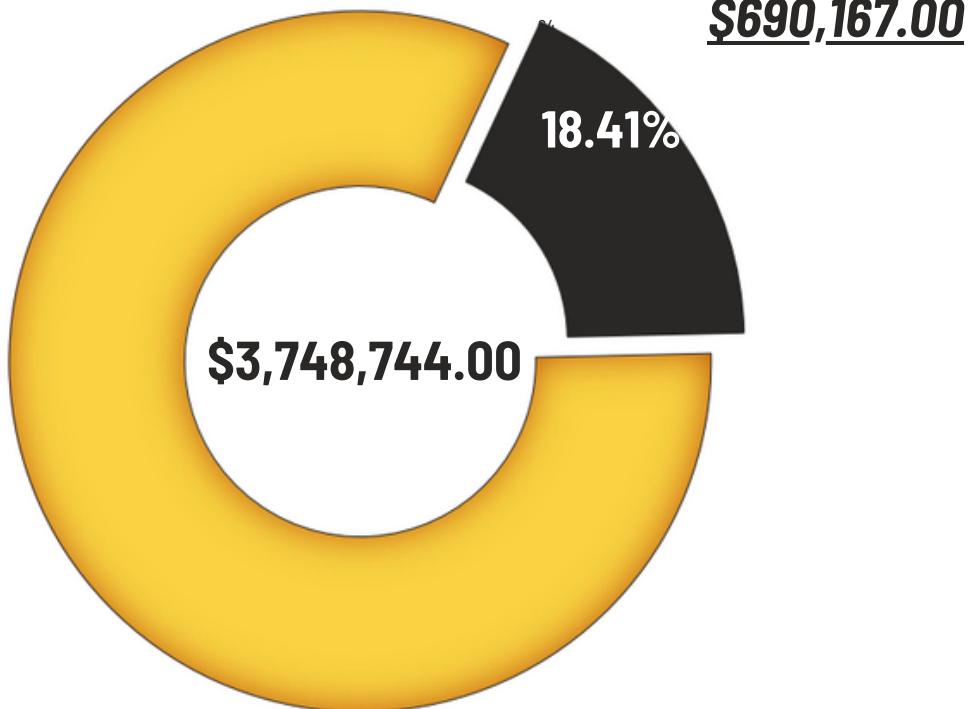
2. In a closer perspective, disputes over invoices can be a time-consuming and expensive process for both Yellecate and its customers. **On average, it takes 36 days to settle disputed invoices**, resulting in a significant loss of time and resources for both parties.

TOTAL DISPUTES



3. As mentioned in the problem, Yellevates' loss in revenue can be attributed to the 571 disputes it faced, with **101 or 17.69% cases being lost**. This has highlighted the importance of understanding and managing disputes in order to ensure that a business does not suffer from financial losses.

INVOICE AMOUNT FROM DISPUTES



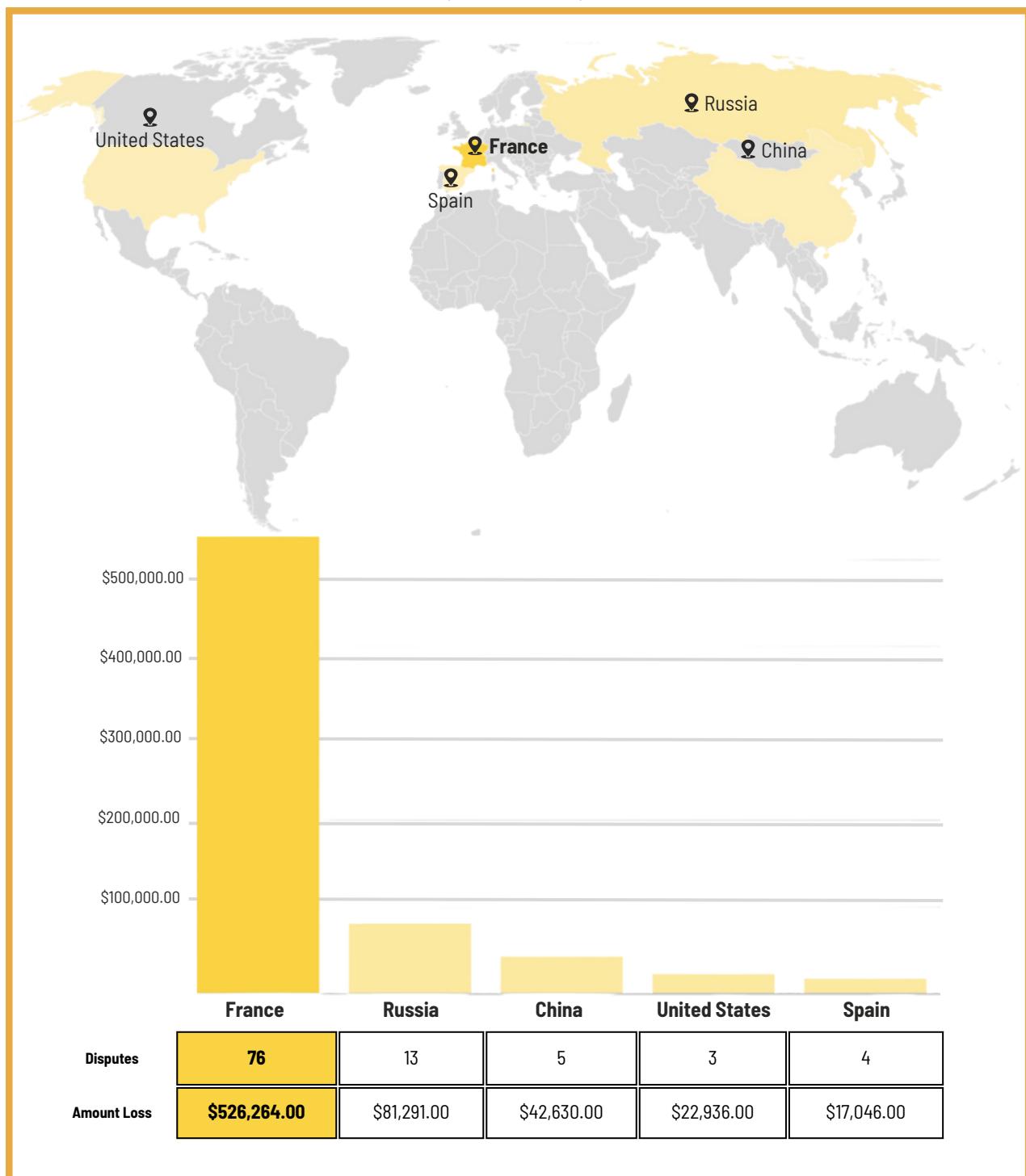
*Based on the gathered data for 2020, 2021 and first quarter of 2022

4. Disputes can be filed for a variety of reasons, including dissatisfaction with products or services, or a feeling that they have been wronged. The company needs to handle these disputes in an efficient and fair manner. Otherwise, it will continue to lose customers.

From the 571 total disputes that customers Yellevate lost, **around 18.41% were due to losses from disputes** amounting to almost \$700k loss. This is a significant amount and it shows that the company needs to improve its dispute management system.

AMOUNT LOSS

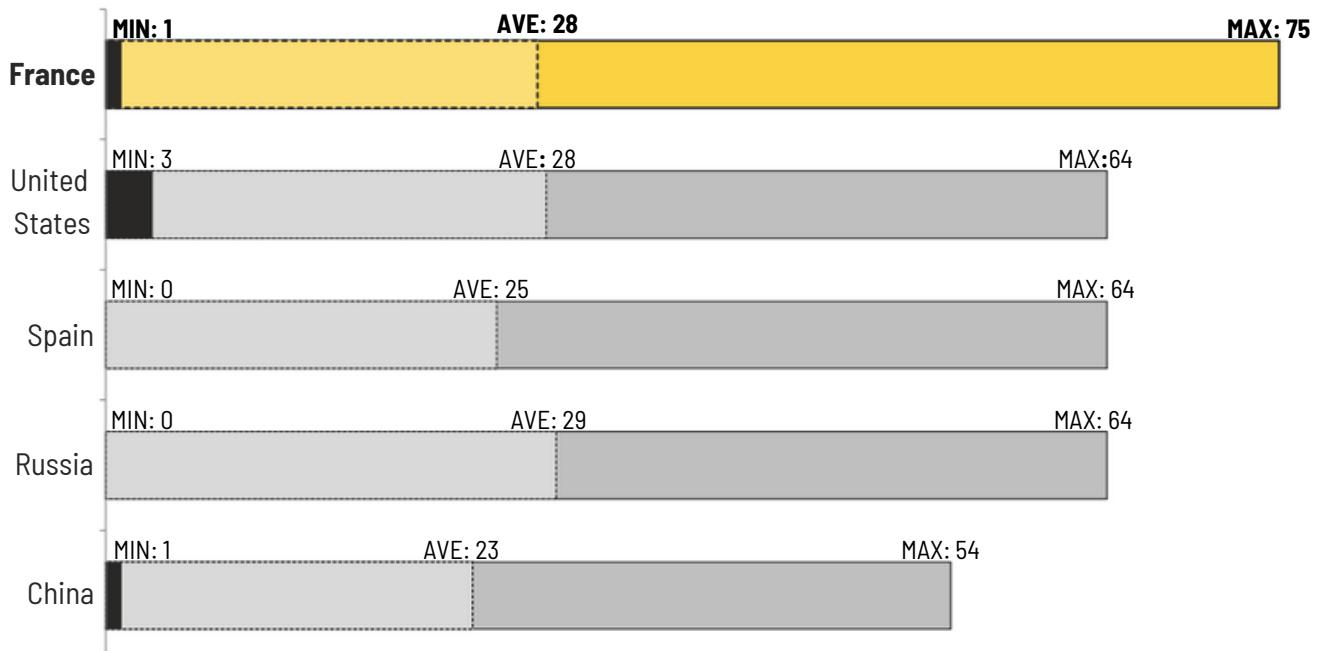
(PER COUNTRY)



5. France had the most customer disputes yielding also to the highest amount of loss. This is a concerning statistic, as it indicates that there is a problem with our customer relations in the country.

DAYS TO SETTLE ALL CUSTOMER INVOICES

(Per Country)



France's average processing times for INVOICES is at par with the rest of the clients in the other countries. EXCEPT FOR THE MAXIMUM of 75 days. How many times did this happen? If only for 1 or 2 invoices it wouldn't be significant.

DAYS TO SETTLE DISPUTED CUSTOMER INVOICES

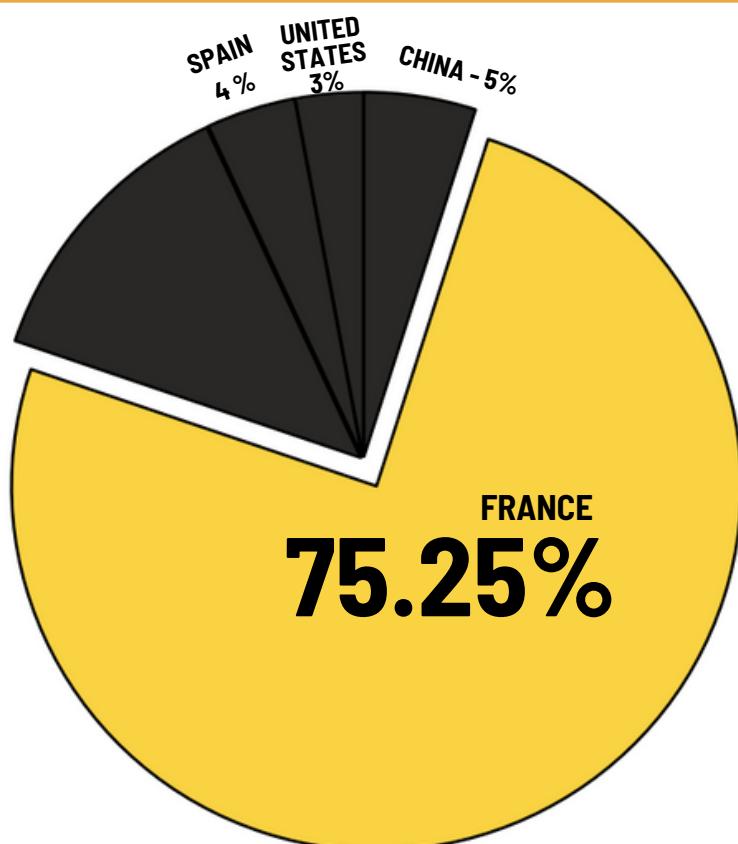
(Per Country)



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DISPUTES LOST

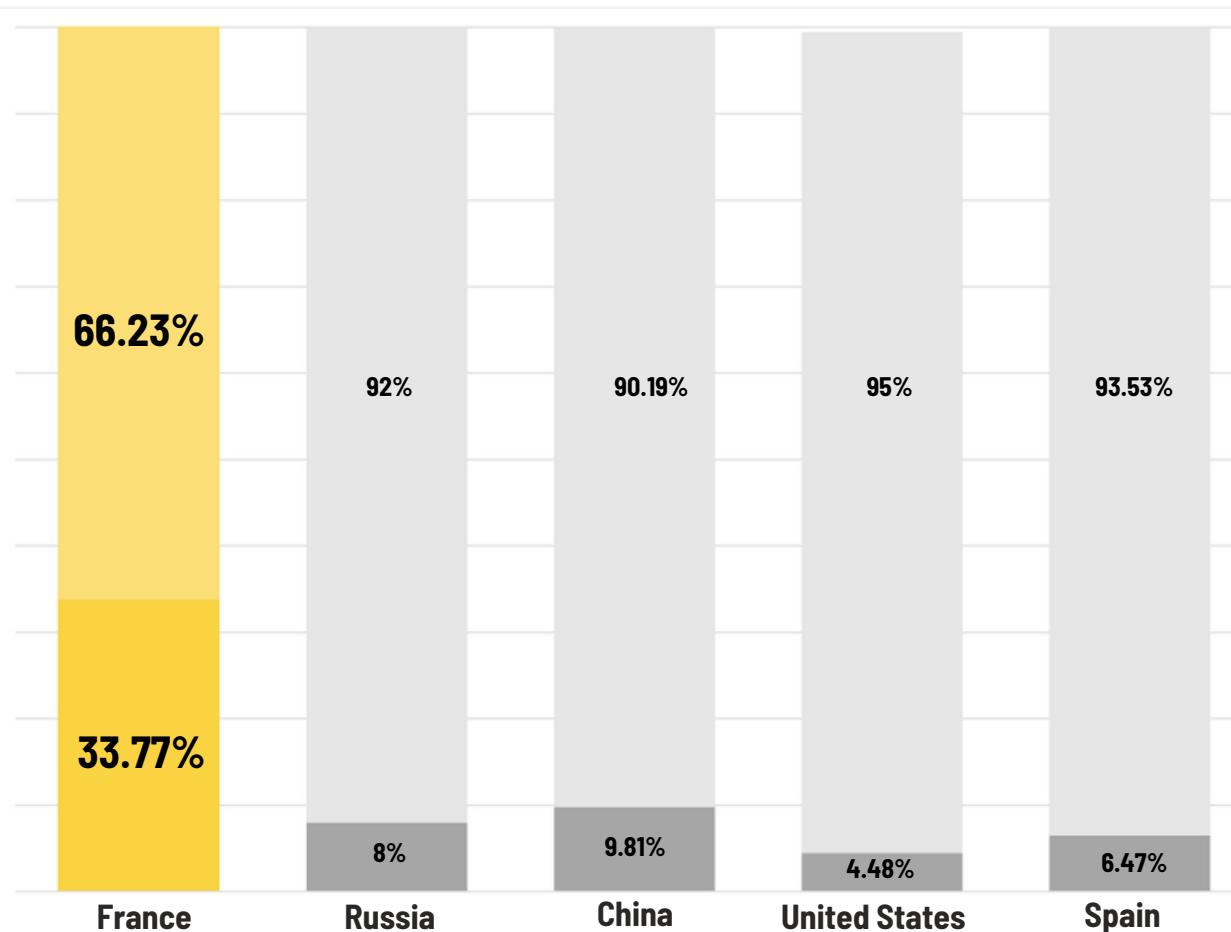
(Per Country)



- ▶ France's average number of disputes received that were lost is quite high at 75.25%

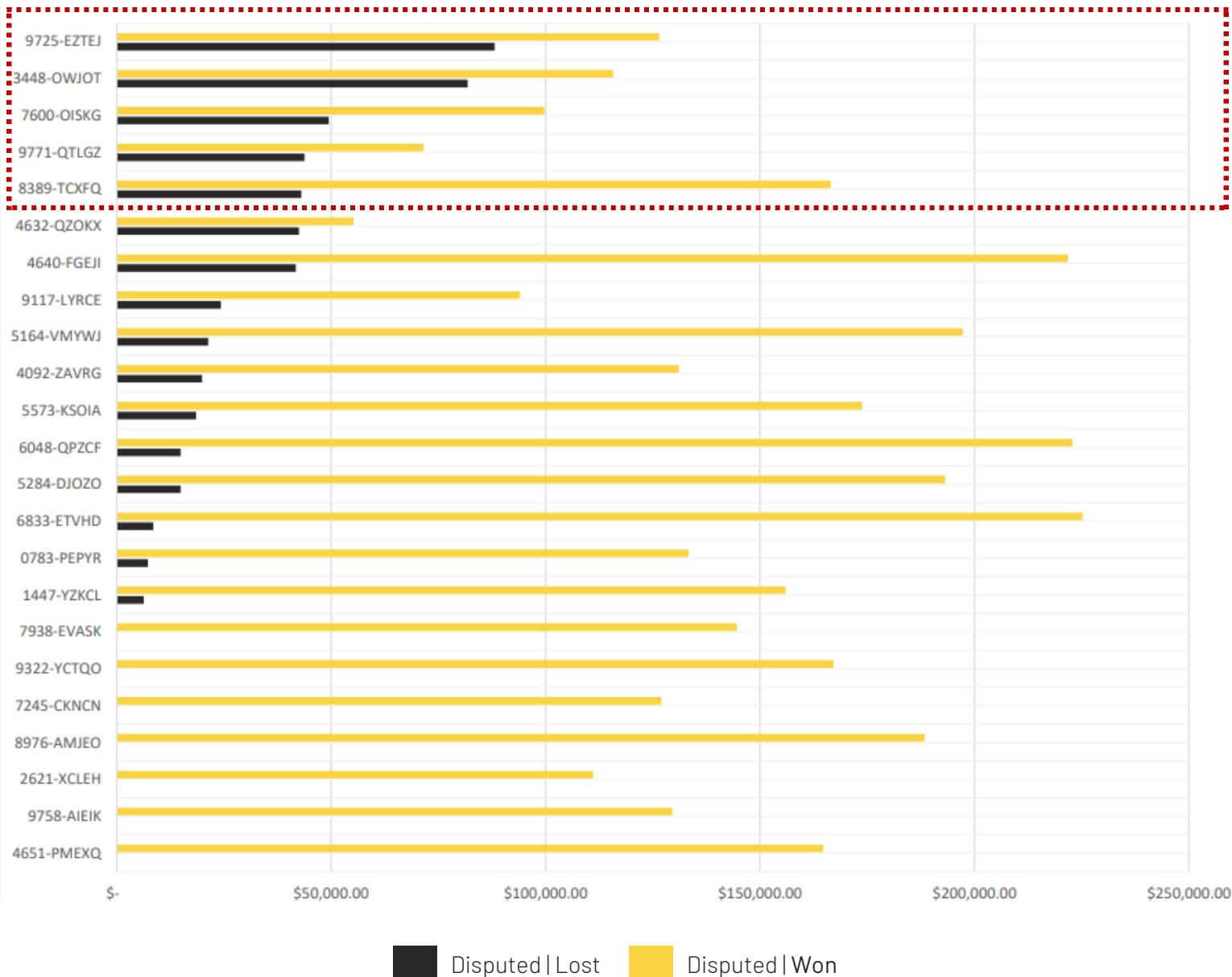
PERCENTAGE OF REVENUE LOST TO DISPUTES

(PER COUNTRY)



- ▶ France's revenue lost due to disputes is very high with more than half a million dollars when the others did not even reach \$ 100,000.

FRANCE'S TOP 5 DELINQUENT CLIENTS



Client-Level Analysis

Soon as we looked into France clients and their distribution of invoices by status of non-disputed, disputed-won and disputed-lost, a sub-group of 5 outlying clients emerged.

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FRANCE'S TOP 5 DELINQUENT CLIENTS

(Per Country)

3448-OWJOT

\$88,124.00
12 Disputes

9725-EZTEJ

\$81,783.00
11 Disputes

7600-OISKG

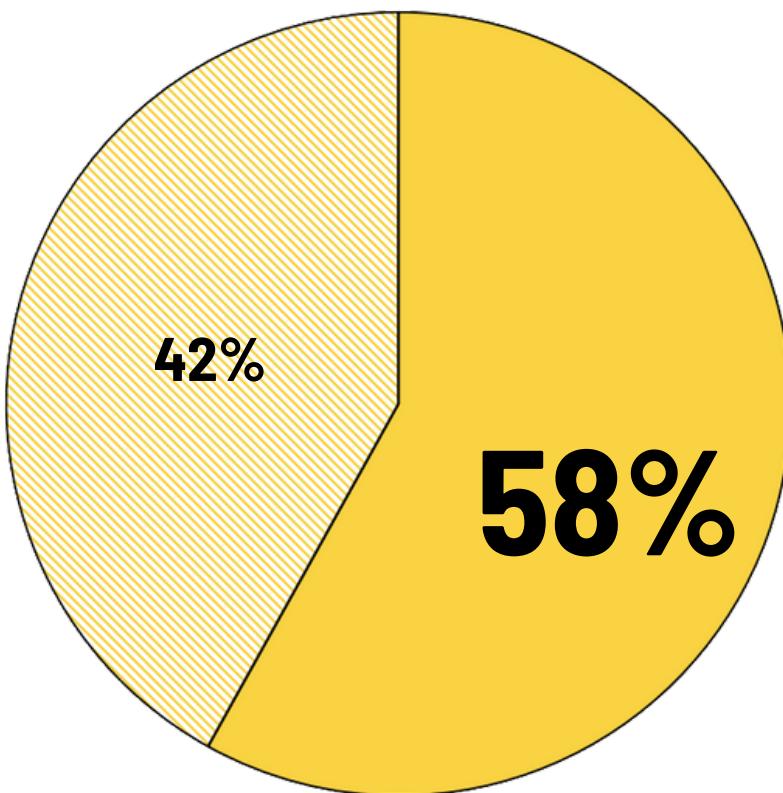
\$49,426.00
8 Disputes

4632-QZOKX

\$42,486.00
8 Disputes

9771-QTLGZ

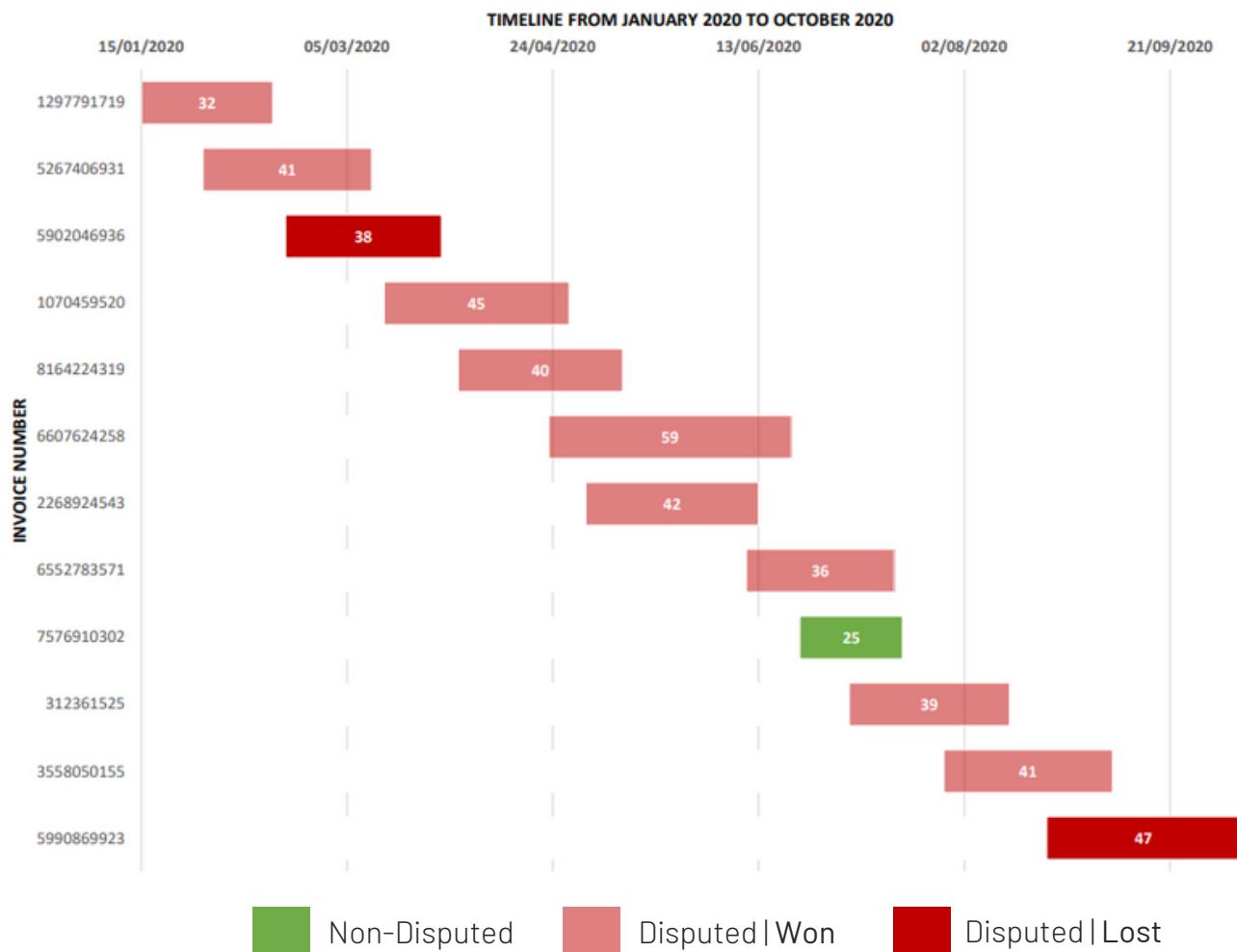
\$43,770.00
8 Disputes



- The data on the 5 delinquent clients show they generated 58% of the lost revenue in France from the \$526,264.00

5 clients' distribution of invoice status stood out among the 23 clients that we have data on for France. Their invoices were almost all disputed, and had very few non-disputed, compared to the other 18 clients, shown in the 2 charts here on the right.

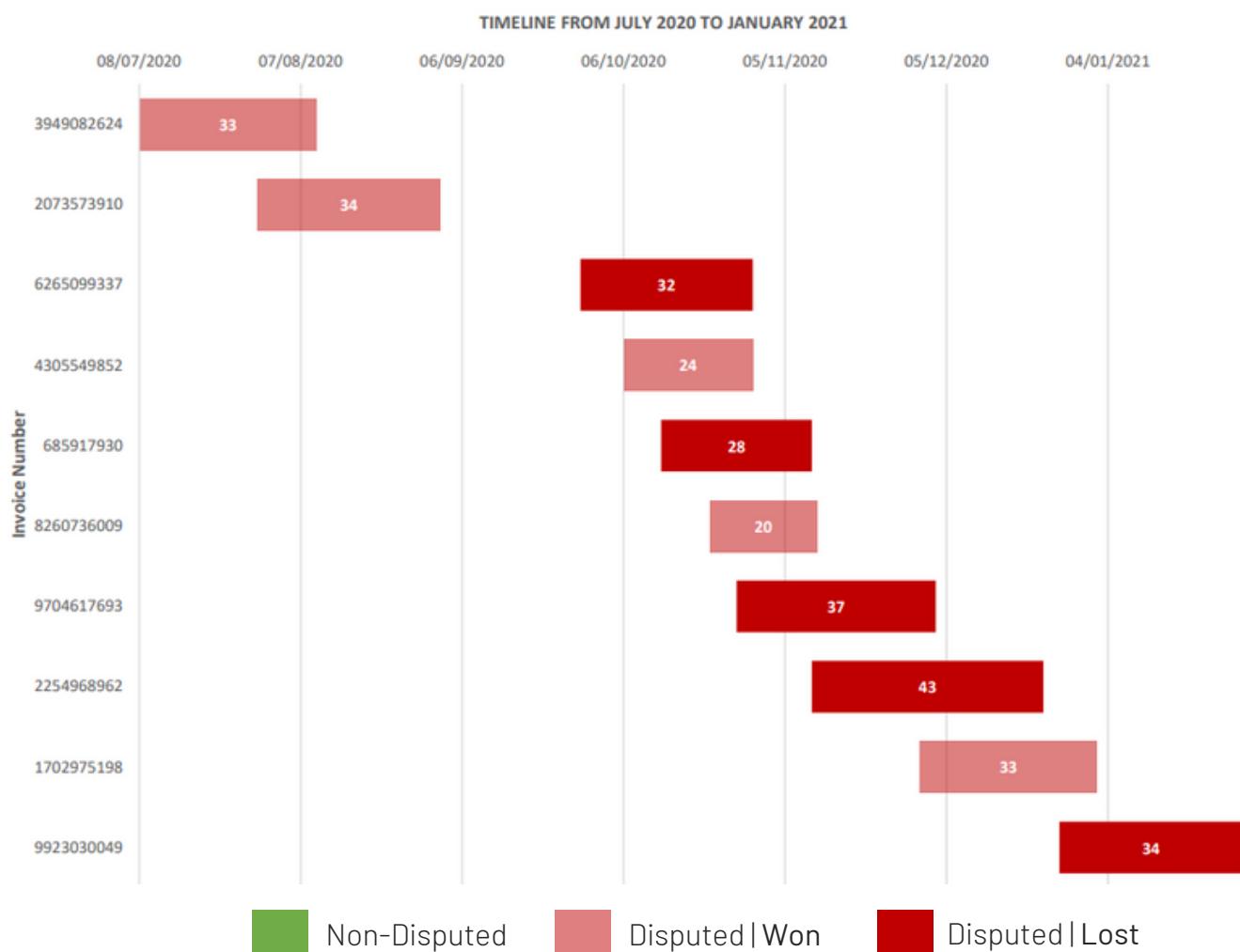
Customer ID: 3448-0WJOT



Gantt Charts

A view using Gantt charts revealed over-stacking of invoices, therefore work, was in practice there. Work and invoices continued to be done for them even when current disputed invoices were not resolved yet.

Customer ID: 9725-EZTEJ



Another customer ID where it shows unnecessarily stacked the work was, and how this lack of service control aided in magnifying the problem for the company.

INSIGHTS

FRANCE

Country with the Highest Revenue Lost due to Disputes

‣ Over-utilization of
the Dispute policy.

‣ Over-stacking of
Service Invoices

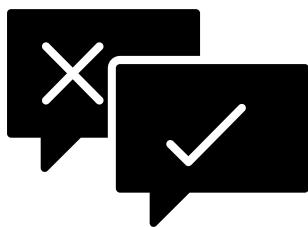
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- ▲ High # of Disputes
 - ▲ High# of Disputes Lost
 - ▼ Low # of Non-Disputes

\$ 526,264

RECOMMENDATION

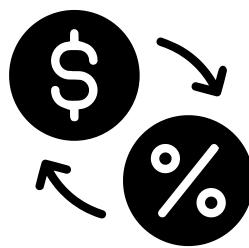
REVIEW AND REVISION

DISPUTE CLAUSE



Increase the company's protection against over utilization of dispute facility

INTERESTS & PENALTIES



Decrease the chances of dispute facility over-use by enforcing a strict adherence to penalties for abusive dispute filing

SIMULTANEOUS CONTRACTS

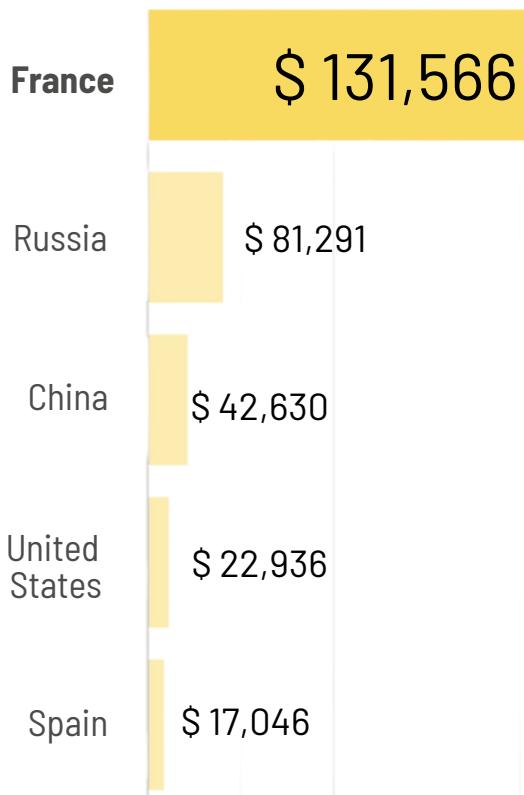


Prevent service over-stacking by imposing a reasonable threshold for simultaneous service contracts especially with current unresolved disputes

PROJECTIONS

75% REDUCTION

In the top 5 delinquent clients' revenue lost due to disputes



REVENUE LOST TO DISPUTES
‐ $< \$300,000$

