

# MAVENTECH QUARTERLY PERFORMANCE

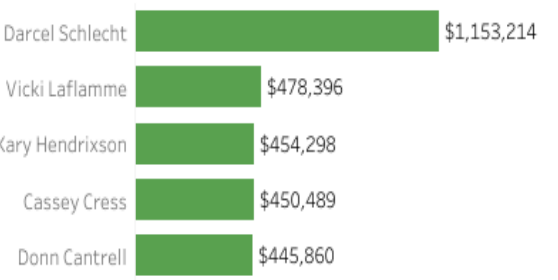


Top Selling Product	Top Selling Account	Top Selling Country	Total Revenue	Total Deals Won	Total Deals Lost
GTXPro	Kan-code	United States	\$10.01M	4,238	2,473

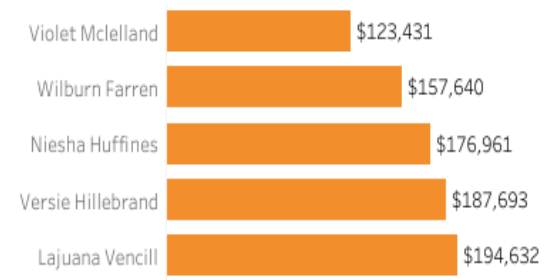
Quarter All

Sales Agent All

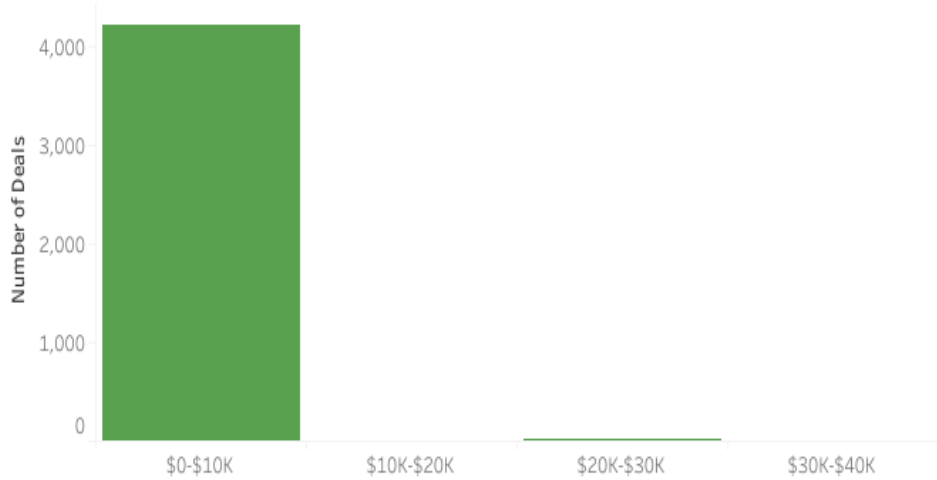
Sales Agents by Most Revenue



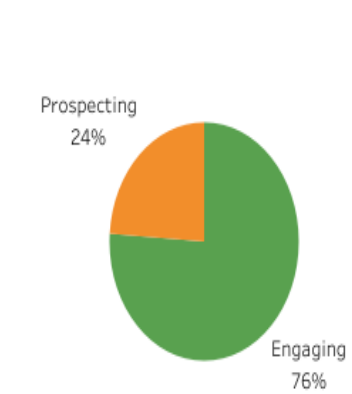
Sales Agents by Least Revenue



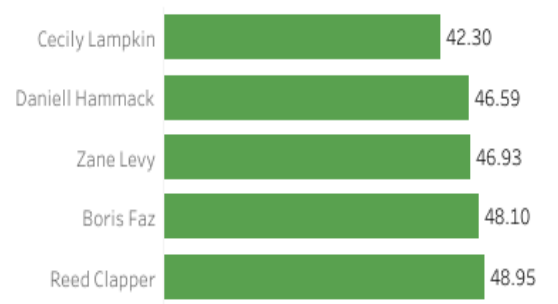
Revenue Distribution



Pending Deals Breakdown



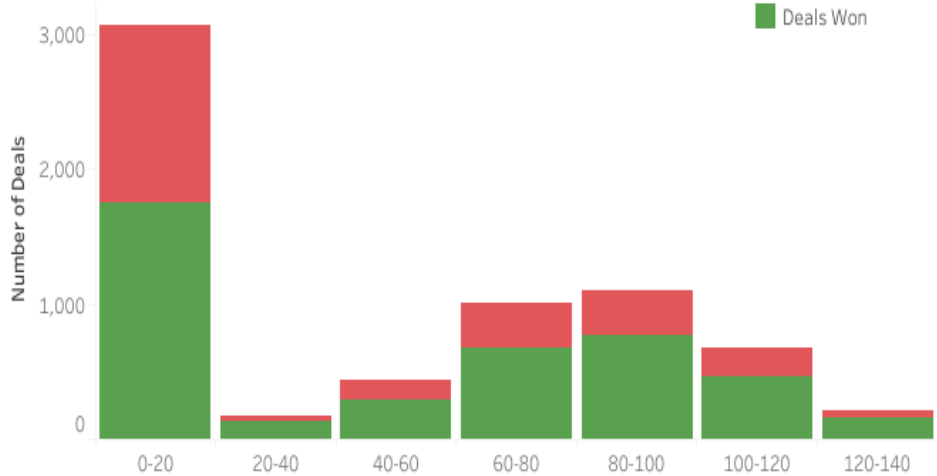
Sales Agents by Shortest Days to Close



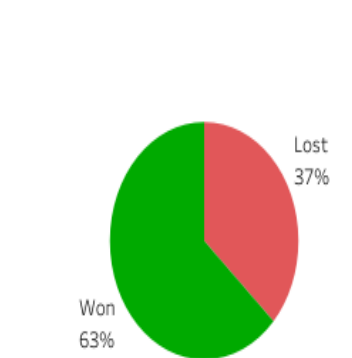
Sales Agents by Longest Days to Close



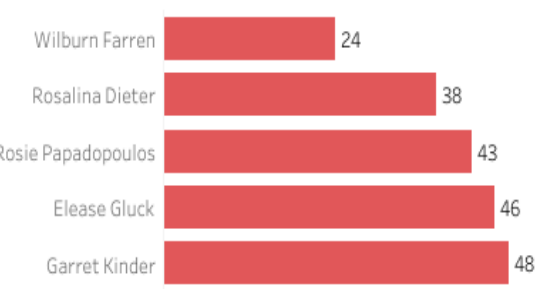
Days to Close Distribution



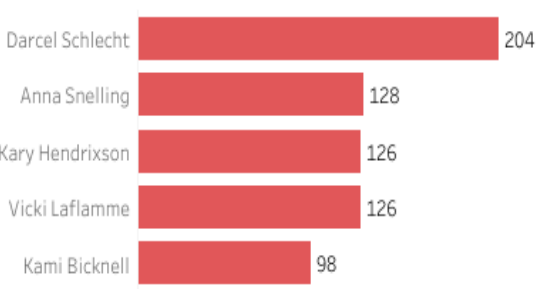
Closed Deals Breakdown



Sales Agents by Least Deals Lost



Sales Agents by Most Deals Lost



# Objective

- ▶ I am a BI Developer for MavenTech, a company that specializes in selling computer hardware to large businesses.
- ▶ They've been using a new CRM system to track their sales opportunities but have no visibility of the data outside of the platform.
- ▶ To become a data-driven organization, the company wants to track the sales team's quarterly performance.

# Approach

- ▶ I analyzed the performance of the sales agents for the company.
- ▶ I created a relational data model using Power Pivot.
- ▶ I created an interactive dashboard using Tableau for my analysis.
- ▶ I have uploaded all the files for this project onto my [GitHub](#).

# Scope of Analysis

- ▶ My analysis will assess the following information:
  - ▶ The efficiency of the sales agents in closing deals successfully
  - ▶ The closing value for the successful deals of each sales agent
  - ▶ Customer loyalty
- ▶ My analysis has the following limitations:
  - ▶ I did not go in-depth in analyzing the performances of certain products.
  - ▶ I did not go in-depth in analyzing the customers because there wasn't any data about their characteristics.

# Questions

- ▶ My analysis aims to answer the following questions:
  - ▶ Which sales agents successfully closed deals with the most and least value?
  - ▶ Which sales agents unsuccessfully closed the least and most deals?
  - ▶ Which sales agents took the shortest and longest days on average to close a deal?
  - ▶ How was the revenue distributed for each closed deal?
  - ▶ How were the days to close distributed for each closed deal?
  - ▶ What was the share of closed deals?
  - ▶ What was the share of pending deals?
  - ▶ What was the top-selling product and account?

# Assumptions

- ▶ There were some outliers in the dataset.
  - ▶ There were 15 successfully closed deals with values of \$20,000 or more.
    - ▶ The rest of the 4,238 successfully closed deals had values of \$10,000 or less.
  - ▶ I will not be working with average closing values for this project.
    - ▶ Therefore, I decided not to filter out these deals because it would not skew my analysis.
    - ▶ Furthermore, I will be using these outliers as the main talking points of my analysis.
- ▶ Korea was listed as a country.
  - ▶ I assumed that this was some kind of user input error.
  - ▶ I assumed that this row meant to say South Korea, so I renamed the country to that.

# About the Dataset

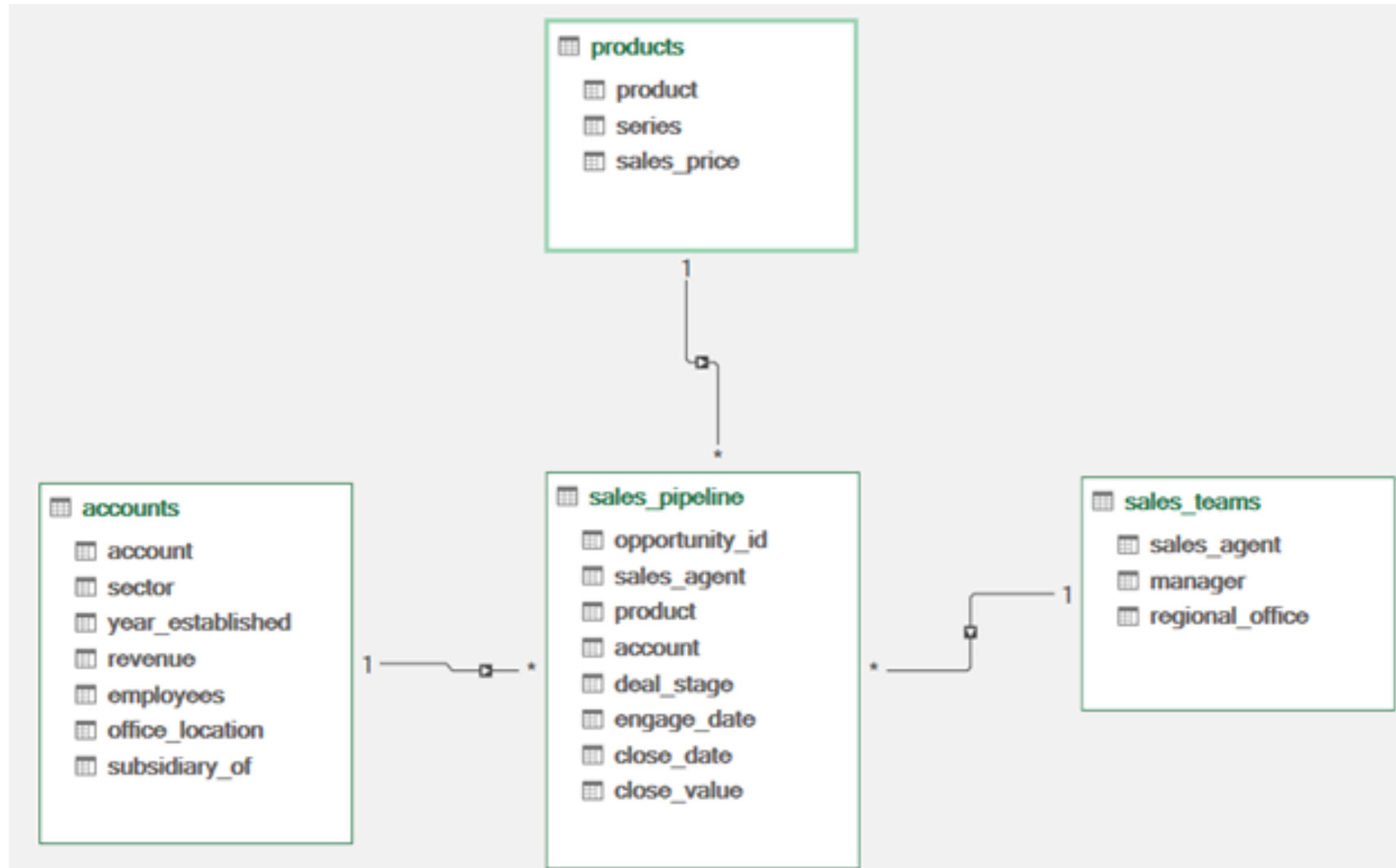
- ▶ These were the four tables used for this project:
  - ▶ product:
    - ▶ A dimension table containing information about the products sold.
  - ▶ account:
    - ▶ A dimension table containing information about accounts of the company.
  - ▶ sales\_teams:
    - ▶ A dimension table containing information about the sales agents and their managers.
  - ▶ sales\_pipeline:
    - ▶ A fact table containing logs of all the deals being made by the sales agents.

# Data Cleaning Strategy

- ▶ The dataset for this project was structured and mostly clean.
  - ▶ Therefore, my data cleaning strategy wasn't heavily involved.
- ▶ I only had to correct the misspelling of Philippines in the account table.



# Data Model



# Deal Insights

- ▶ An overwhelming majority of deals successfully closed at a value of \$10,000 or less.
- ▶ Customers mostly spent between 0-20 days to close a deal.
- ▶ These are the following insights into the closed deals:
  - ▶ 63% of the closed deals were successful.
  - ▶ 37% of the closed were unsuccessful.
- ▶ These are the following insights into the pending deals:
  - ▶ 76% of the pending deals are engaging.
  - ▶ 24% of the pending deals are prospecting.
- ▶ GTXPro and Kan-code were the top-selling products and accounts, respectively.

# Sales Agent Insights

- ▶ Darcel Schlecht successfully closed deals with the largest value (\$1,153,214).
  - ▶ However, he also unsuccessfully closed the most deals as well (204 deals).
- ▶ Violet Mclelland successfully closed deals with the lowest value (\$123,431).
- ▶ Wilburn Farren unsuccessfully closed the least deals (24 deals).
- ▶ Cecily Lampkin successfully closed deals the shortest on average (42.30 days).
- ▶ Moses Frase successfully closed deals the longest on average (64.69 days).
- ▶ The following sales agents successfully closed deals at \$20,000 or more:
  - ▶ Elise Gluck
  - ▶ Markita Hansen
  - ▶ Rosalind Dieter

# Quarterly Insights

- ▶ The first quarter had the least number of unsuccessful deals (18%).
  - ▶ However, that number quickly jumped to 38% in the second quarter.
  - ▶ It then increased steadily during the third and fourth quarters (39% and 40% respectively).
- ▶ Customers took longer to close a deal in the first quarter.
  - ▶ Most deals took between 0-20 days or 60-120 days to close.
- ▶ Customers began to close deals faster in later quarters.
  - ▶ There were not many deals that took more than 20 days to close.

# Conclusion

- ▶ MavenTech is suffering from a decrease in customer loyalty.
  - ▶ The number of unsuccessful deals has been increasing since the first quarter.
- ▶ MavenTech customers are not willing to spend a lot of money.
  - ▶ The revenue distribution is extremely right-skewed, with successful deals closing at \$10,000 or more being insignificant.
- ▶ MavenTech customers tend to close deals quickly.
  - ▶ The days to close distribution is right-skewed, with deals taking more than 20 days to close being rare.

# Recommendations

- ▶ Prioritize training of the sales agents.
  - ▶ Incorporate people skills and persuasiveness training to improve their ability to have customers close deals successfully and quickly.
- ▶ Prioritize efforts at retaining the following sales agents:
  - ▶ Elise Gluck
  - ▶ Markita Hansen
  - ▶ Rosalind Dieter
    - ▶ These sales agents were able to close deals with the largest value.
    - ▶ Therefore, they are the most valuable sales agents for the company.
    - ▶ Consider promoting these sales agents to increase their likelihood of staying with the company.
- ▶ Create a loyalty rewards program.
  - ▶ Due to the unwillingness of customers to spend a lot of money, it is likely that financial barriers are preventing customers from closing deals successfully.
  - ▶ I recommend that the rewards program include discounts on underperforming computer hardware products.
- ▶ Prioritize selling GTXPro and Kan-code products.
  - ▶ Since these were top-selling products, their demand is very high.
  - ▶ Therefore, these products are vital to the success of the company.