

Project Brief

Friday, 30 May 2025

9:41 AM

You work as a Sales Manager for Millennials Tech, a company that specializes in selling computer hardware to large businesses. They've just started using a new CRM system to track their sales opportunities but have no visibility of the data outside of the platform. To combat this, you've set out to build an interactive dashboard that enables sales managers like yourself to track their team's quarterly performance.

Along the way, you'll :

- 1 Prepare the data for analysis
- 2 Explore the data with pivot tables
- 3 Build a dynamic dashboard

Objective 1 - PREPARE DATA

PREPARE THE DATA FOR ANALYSIS :

Open the sales_pipeline.csv file in Google sheets.

Take a moment to familiarize yourself with the data. How many opportunities has been won , over what period of time ? What products were sold ? Are there any missing values?

Open the sales_teams.csv file in new tab

Bring the manager and regional_office for each sales_agent in the sales_pipeline table.

STEPS TAKEN :

1. Import CSV files.
2. Check Column Stats for each column.
3. Understood the data.
4. Use Xlookup to bring the manager and regional_office for each sales_agent in the sales_pipeline table.
5. Use Absolute and relative cell references in Xlookup formula.

Objective 2 - EXPLORE DATA

EXPLORE THE DATA WITH PIVOT TABLES

Insert a pivot table on a new tab to show opportunities won by quarter.

Add another pivot table on same sheet to break down the percentage of won & lost opportunities by quarter.

Create a final Pivot table to show the opportunities won by quarter for each sales agent, and sort the sales agents in descending order by opportunities won.

Restructure the first two pivot tables so that they have the quarters as pivot table columns(not rows), and sort them so the most recent quarter always comes first.

STEPS TAKEN :

1. Insert Pivot table . Select values , rows and columns as per objective.
2. Created separate table to show Lost and Won opportunities and converted into percentage to show how many percent are won and how many lost.
3. Arrange pivot tables in descending order to show latest dates first.

Objective 3 - BUILD DASHBOARD

BUILD A DYNAMIC DASHBOARD

Insert a scorecard chart visual to show the opportunities won for the most recent quarter(2017-Q4) compared to the previous one (Q3).

Use a pie chart to show the percentage of opportunities won & lost in the most recent quarter.

Use a bar chart to visualise the opportunities won by sales agent for the most recent quarter.

Add slicers for the regional_office and manager fields.

Finish things off by arranging the visuals into the dashboard and adding a title.

STEPS TAKEN :

1. Insert Scorecard , Pie chart and a Bar charts - Formatting , adding title & assigned colors.
2. Add Slicers to filter the visuals.
3. Arrange the visuals to form a dynamic dashboard.

	close_date - Year-Quarter				
	2017-Q4	2017-Q3	2017-Q2	2017-Q1	Grand Total
COUNTA of opportunity_id	1196	1257	1254	531	4238

COUNTA of opportunity_id deal_stage	close_date - Year-Quarter				
	2017-Q4	2017-Q3	2017-Q2	2017-Q1	Grand Total
Won	60.25%	61.41%	61.71%	82.07%	63.15%
Lost	39.75%	38.59%	38.29%	17.93%	36.85%

COUNTA of opportunity_id sales_agent	close_date - Year-Quarter				
	2017-Q4	2017-Q3	2017-Q2	2017-Q1	Grand Total
Darcel Schlecht	94	115	96	44	349
Vicki Laflamme	68	63	57	33	221
Kary Hendrixson	64	54	55	36	209
Anna Snelling	57	55	71	25	208
Versie Hillebrand	51	47	52	26	176
Kami Bicknell	51	44	53	26	174
Jonathan Berthelot	46	54	57	14	171
Cassey Cress	39	53	48	23	163
Zane Levy	52	41	50	18	161
Donn Cantrell	37	58	44	19	158
Reed Clapper	38	49	49	19	155
Corliss Cosme	43	48	36	23	150
Maureen Marcano	37	48	42	22	149
James Ascencio	45	35	39	16	135
Gladys Colclough	41	42	34	18	135
Markita Hansen	35	41	39	15	130
Moses Frase	36	35	43	15	129
Lajuana Vencill	36	36	39	16	127
Violet Mclelland	35	36	34	17	122
Marty Freudenburg	39	38	33	12	122
Daniell Hammack	27	29	47	11	114
Hayden Neloms	32	29	36	10	107
Cecily Lampkin	33	33	31	10	107
Niesha Huffines	23	39	31	12	105
Boris Faz	34	31	29	7	101
Elease Gluck	23	20	26	11	80
Rosie Papadopoulos	21	23	26	8	78
Garret Kinder	16	24	22	13	75
Rosalina Dieter	21	21	21	9	72
Wilburn Farren	22	16	14	3	55

Quarterly Sales Performance

regional_officeAll

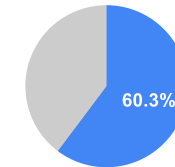
manager All

Opportunities won

1196

↓-61 vs. prev

Win %



Opportunities won by Sales agent

