

Sendoso Business Operations & Analytics

Introduction

Thank you for taking the time to work through this exercise. This take-home assignment shouldn't take more than 2-4 hours for you to complete. While it is meant for us to get a sense of your analytical skill set, it is also an opportunity for you to get a sense of the types of problems you'll tackle with us at Sendoso. If you have any questions while completing this assignment, feel free to make any necessary assumptions, and clearly list out what you chose and why.

Please do not hesitate to reach out to Lauren (lauren.cenko@sendoso.com) if you have any further questions or require additional clarification. Upon completing the exercise, please respond to the email thread that assigned you this project.

Part I:

Utilizing the tables provided below, please write SQL statements to accomplish the following prompts:

- Return the total number of active customers by industry.
- Return a list of Enterprise customers who have made at least 3 sends, sorted in descending order by number of total sends.
- Return a list of active customers, the first send date for each of those accounts, and the user email of the user who placed that send. If an applicable account has never attempted a send, return Null as their first send date.

Accounts Table

Each row in this table represents a company in Sendoso's Salesforce database

Column Name	Type
account_id	int
account_name	varchar
industry	varchar
account_segment*	varchar
customer_start_date	timestamp
customer_end_date	timestamp
is_active_customer	boolean

**Applicable values: Enterprise, Mid-Market, or SMB*

Users Table

Each row in this table represents a user that has/had access to the Sendoso platform

Column Name	Type
user_id	int
first_name	varchar
last_name	varchar
account_id	int
user_email	varchar

user_created_date	timestamp
user_deleted_date	timestamp

Transactions Table

Each row in this table represents a transaction (or “send”) made on the Sendoso platform

Column Name	Type
transaction_id	int
transaction_date	timestamp
campaign_name	varchar
transaction_type	varchar
gift_id	int
account_id	int
user_id	int

Part II:

As a member of our Business Operations Team, your role is essential in providing valuable insights to our leadership team by summarizing and presenting a recap of our core sending business at the end of each month. Attached is a sample data file containing a fictional data subset for a given month.

Please create a concise presentation comprising no more than 5 slides, suitable for a C-Suite / Board-level audience. Your presentation should provide an overview of the month's activities, highlighting any noteworthy findings and key takeaways.

Please include any relevant supporting files/documentation (e.g. SQL queries, visualization/calculation files). For context, Sendoso leverages Tableau, but you are welcome to utilize the data visualization tool of your choice.

Reference - Data Dictionary

Table	Column Name	Description
transactions	TRANSACTION_ID	Unique identifier for each transaction
transactions	TEAM_ID	Team, or account, that made the transaction
transactions	INTEGRATION	More context on integrations Indicates which integration was leveraged for the transaction INTEGRATION = Sendoso.com indicates that the send was initiated through our platform and not through an integration
transactions	CREATED_DATE	Date the transaction was created
transactions	TOUCH_ID	Unique identifier for each send bundle option
transactions	SEND_TYPE	-eGift: digital gift cards -OnDemand: direct ship from our

		<p>marketplace vendors</p> <p>-Physical: physical bundle utilizing items stored in our fulfillment centers</p>
transactions	USER_ID	User that made the transaction
transactions	STATUS	<p>Transaction status</p> <p>See further details below</p>
transactions	ATTEMPTED_SPEND	Customer cost of the transaction
transactions	ADDRESS_CONFIRMATION_ELIGIBLE	<p>More context on Address Confirmation feature</p> <p>Indicates whether or not this feature was leveraged by the customer</p>
transactions	ADDRESS_CONFIRMED	Indicates whether or not the recipient filled out the address confirmation form
teams	TEAM_ID	Unique identifier for each team
teams	ACCOUNT_SEGMENT	Account category, based on number of employees
users	USER_ID	Unique identifier for each user
users	TEAM	Corresponding team ID
users	ROLE	User category, based on Sendoso role type
users	DEPARTMENT	User category, based on function

Status	Applicable Send Type(s)	Description
Address Confirmation - Cancelled	OnDemand, Physical	Address Confirmation was leveraged but the recipient did not confirm in time so the order was cancelled
Cancelled	OnDemand, Physical	Order was cancelled by the customer
Confirming Address	OnDemand, Physical	Order is waiting for the recipient to confirm their address
Delivered	OnDemand, Physical	Order was delivered to the recipient
Expired	eGift	eGift was opened but not clicked by the recipient
Expired and Credited	eGift	eGift was never opened by the recipient
Failed	eGift, OnDemand, Physical	Order was unable to be processed
Processing	OnDemand, Physical	Order is in the process of being fulfilled
Refunded	eGift, OnDemand, Physical	Order costs were refunded to the customer
Shipped	OnDemand, Physical	Order was shipped out to the recipient
Undeliverable	OnDemand, Physical	Order was shipped but unable to be delivered to the recipient
Used	eGift	eGift was redeemed by the recipient