Context

4.5 Capstone Project Activity:

- ☐ Think of the best scenario that you would want to present.
- ☐ Identify your set of target audience.
- ☐ Choose a topic you want to present.

Scenario

Sales Performance Review

Number of Audience

15 – 20 People

Target Audience

Sales Team & Management

Topic

Celebrating Achievements & Planning for Success
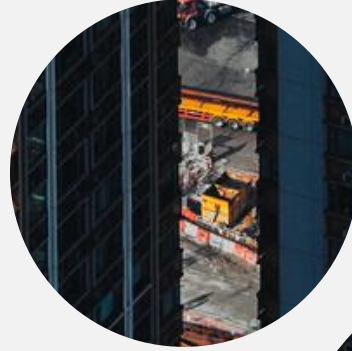
Agenda

- Introduction

- Overall Sales Overview

- Sales Team

- Summary

- What's next

Introduction

Profits are up, and losses are down!

Today, we will review our sales progress from the last five (5) years to gain insight and adjustments to our incoming years.

Invoices.xls   OrderLeads.xls   SalesTeam.xls
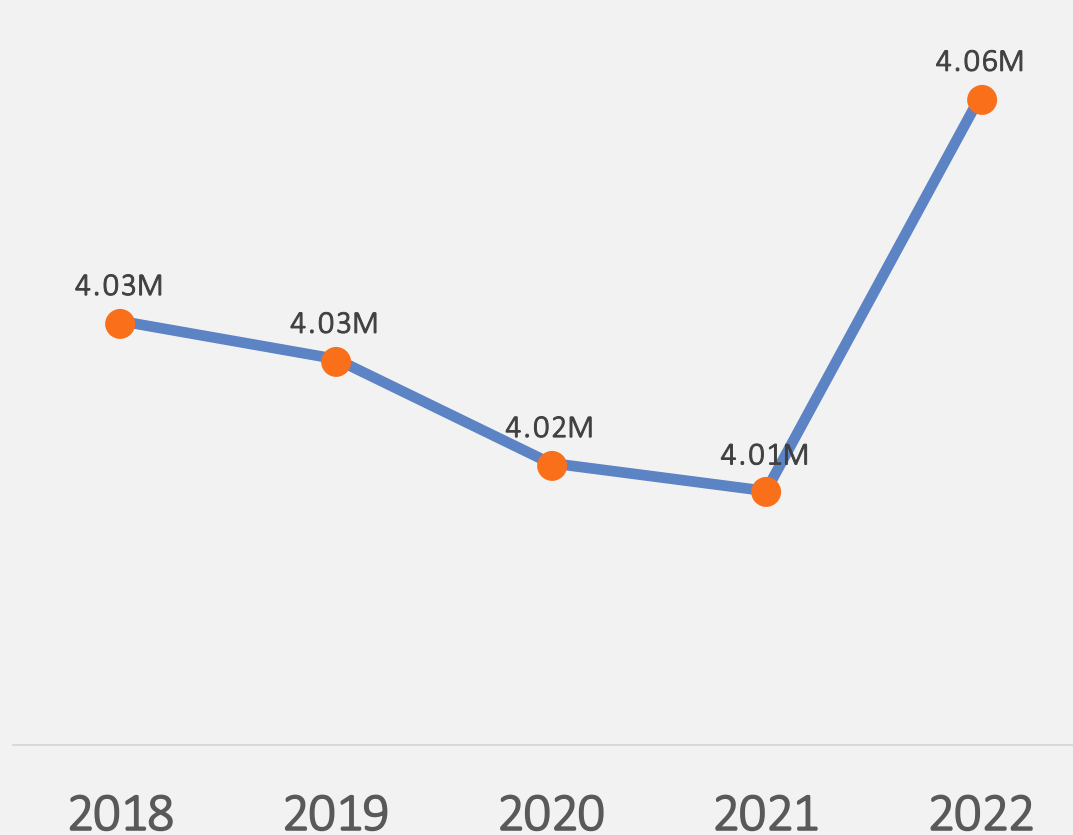
Results from the last five (5) years

[2018 – 2022]

Let's dive in

Sales Growth Over the Years

4.06M

4.03M

4.03M

4.02M

4.01M

2018   2019   2020   2021   2022

1.23% Sales Growth Rate
2021 - 2022
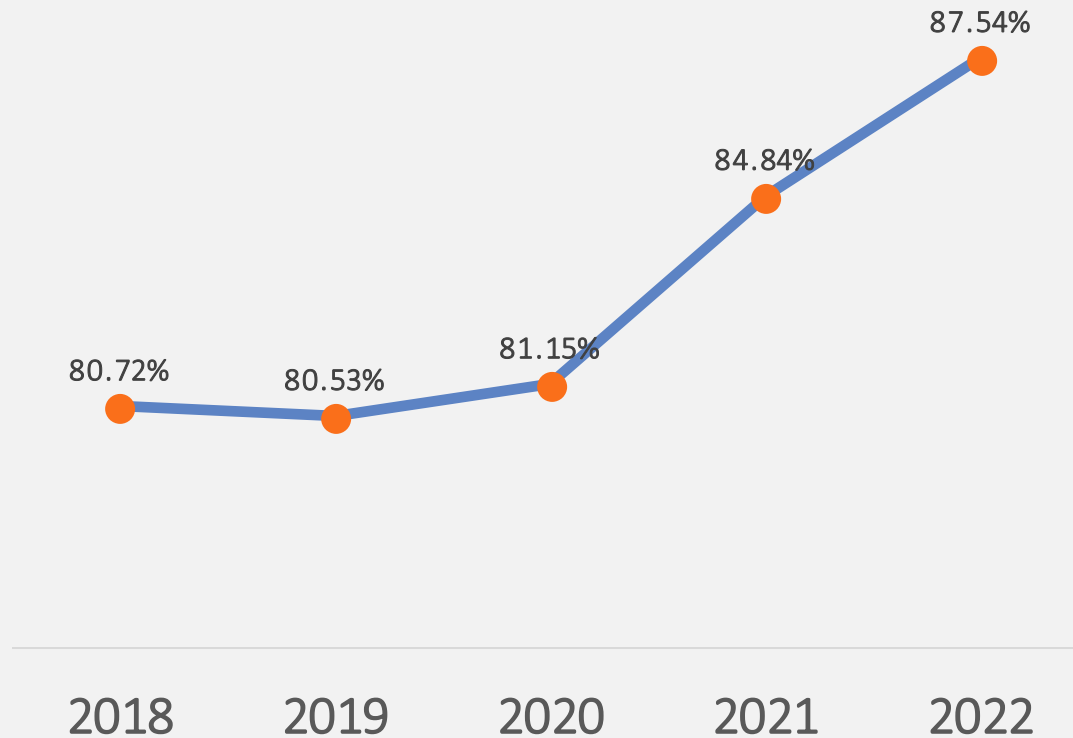
+ ₱ 49,532.00

0.70% Overall Sales Growth Rate
2018 - 2022

+ ₱ 28,220.00

Conversion Rate Over the Years

9.46% Conversion Growth Rate 2018 - 2022

+ 1,529 Orders

2.07% Average Conversion Growth Rate 2018 - 2022

+ 334.28 Orders

Customer Value Segmentation

a strategy used by businesses to categorize their customers into different groups based on their value to the company.

Top Customers

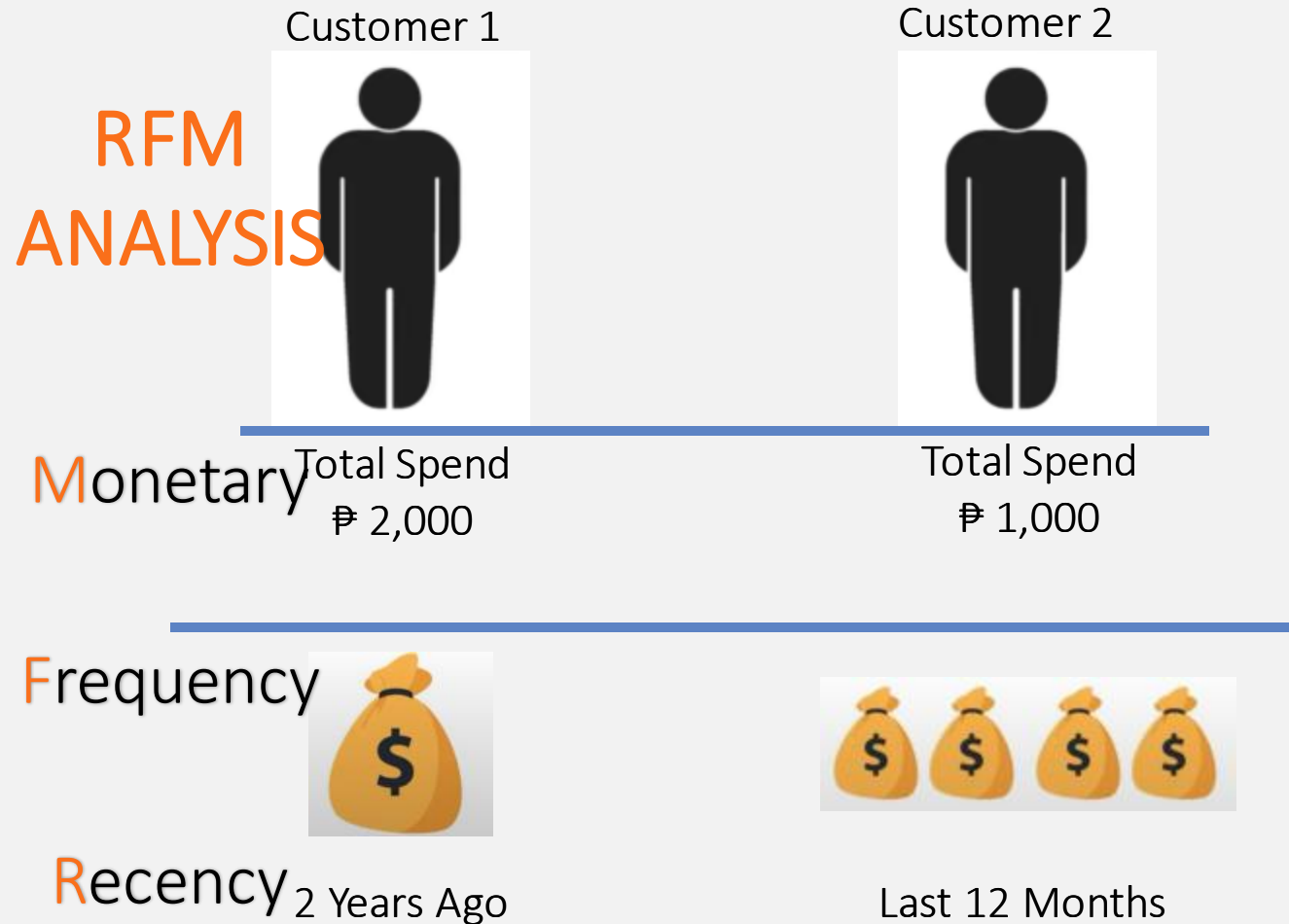**Loyal Customers**

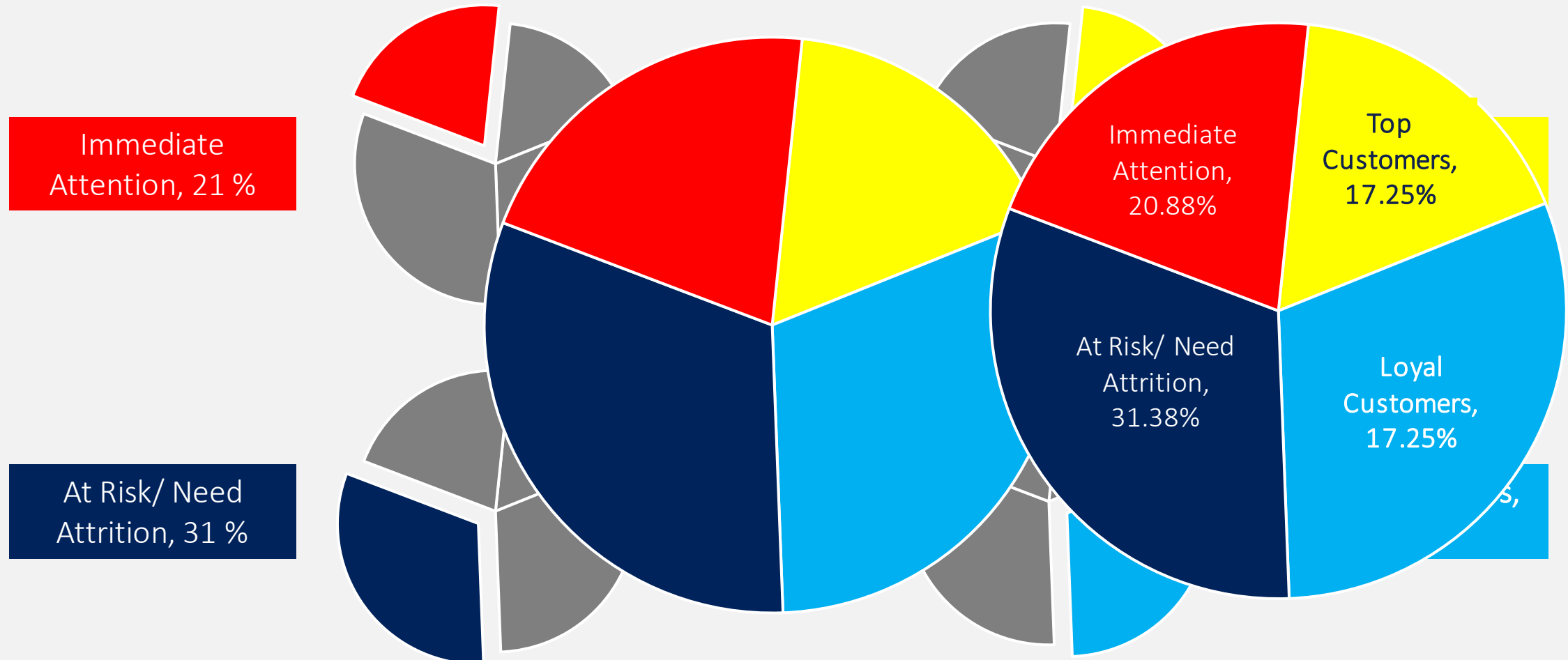**At Risk/Need Attrition**

Immediate Attention

Customer Value Segmentation

Customer 1   Customer 2

RFM ANALYSIS

Monetary   Total Spend ₱ 2,000   Total Spend ₱ 1,000

Frequency

Recency 2 Years Ago   Last 12 Months

Customer Value Segmentation

Immediate Attention, 21 %

At Risk/ Need Attrition, 31 %

Immediate Attention, 20.88%

Top Customers, 17.25%

At Risk/ Need Attrition, 31.38%

Loyal Customers, 17.25%

Customer Value Segmentation

TOP CUSTOMER SEGMENT:

17%

Monetary Average: ₱ 450.90
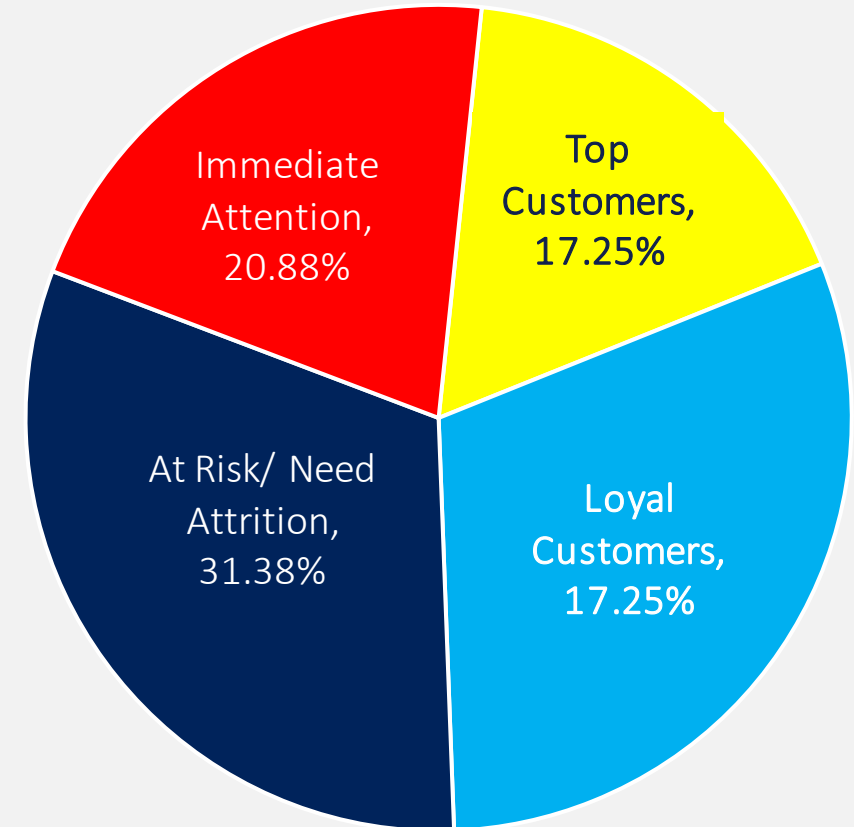
Frequency Average: 14

Latest Purchase History: 12-31-2022

IMMEDIATE ATTENTION SEGMENT:

21%

Monetary Average: ₱ 338.95

Frequency Average: 8

Latest Purchase History: 12-13-2022

Pie chart segments:
- Immediate Attention, 20.88%
- Top Customers, 17.25%
- Loyal Customers, 17.25%
- At Risk/ Need Attrition, 31.38%

Customer Value Segmentation

RFM ANALYSIS

Monetary
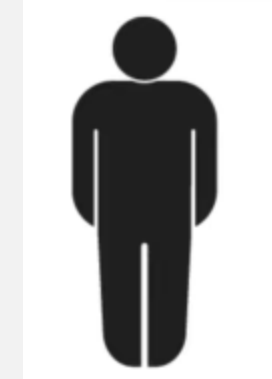
Frequency

Recency

Sales Rep. 1

Sales Rep. 2

Total Sales
₱ 2,000

Total Sales
₱ 1,000

2 Years Ago
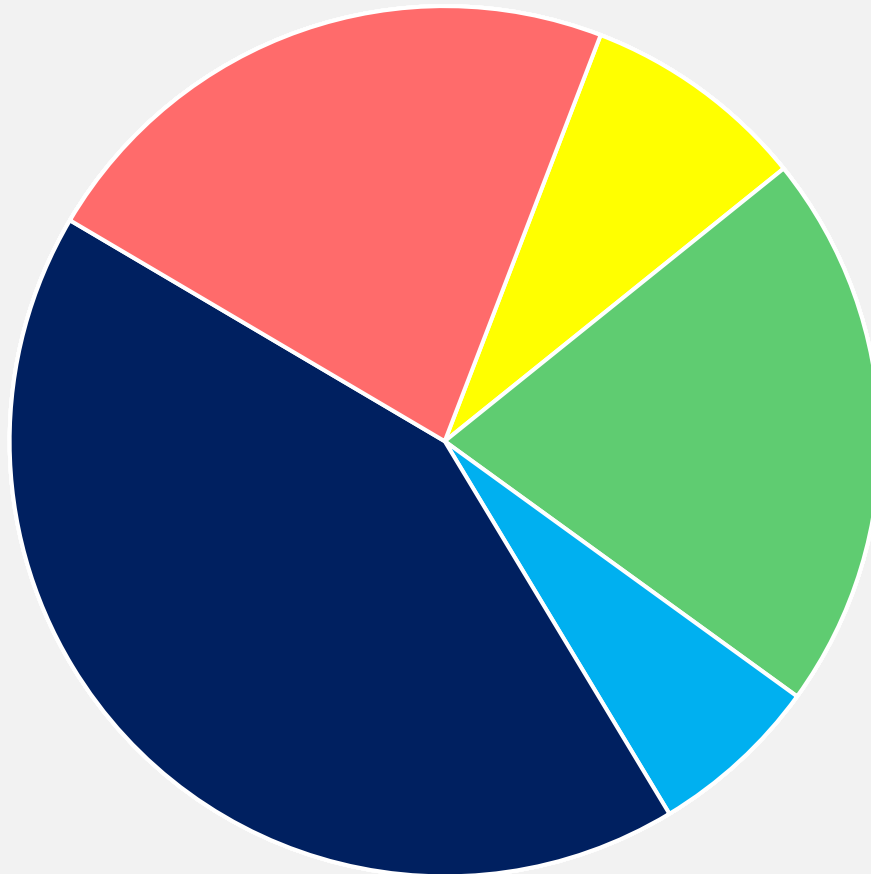
Last 12 Months

Sales Representative Value Segmentation

8% - Outstanding Customer Handlers

21% - Excellent Customer Handlers

6% - Average Customer Handlers

42% - At Risk/Need Improvement

22% - Immediate Attention

Sales Representative Value Segmentation

OUTSTANDING S.R. SEGMENT:

8%

No. of "Need Attention" Accounts: 2

No. of "At Risk" Accounts: 2

No. of "Loyal" Accounts: 6

No. of "Top" Accounts: 3

IMMEDIATE ATTENTION S.R. SEGMENT:

22%

No. of "Need Attention" Accounts: 3

No. of "At Risk" Accounts: 5

No. of "Loyal" Accounts: 3

No. of "Top" Accounts: 2

Immediate Attention, 22%

Outstanding Customer Handlers, 8%

Excellent Customer Handlers, 21%

Average Customer Handlers, 8%

At Risk/Need Improvement, 42%

Summary

Sales Growth Over the Years

1.30% Sales Growth Rate 2021 - 2022

+ ₱ 52,255.00

0.88% Overall Sales Growth Rate 2018 - 2022

+ ₱ 35,393.00

Customer Value Segmentation

17%   TOP CUSTOMER SEGMENT:
Monetary Average: ₱ 450.90
Frequency Average: 14
Latest Purchase History: 12-31-2022

21%   IMMEDIATE ATTENTION SEGMENT:
Monetary Average: ₱ 338.95
Frequency Average: 8
Latest Purchase History: 12-13-2022

Conversion Rate Over the Years

8.45% Conversion Growth Rate 2018 - 2022

+ 8,448 Orders

2.07% Average Conversion Growth Rate 2018 - 2022

+ 2,066 Orders

Sales Representative Value Segmentation

8%   OUTSTANDING S.R. SEGMENT:
No. of "Need Attention" Accounts: 2
No. of "At Risk" Accounts: 2
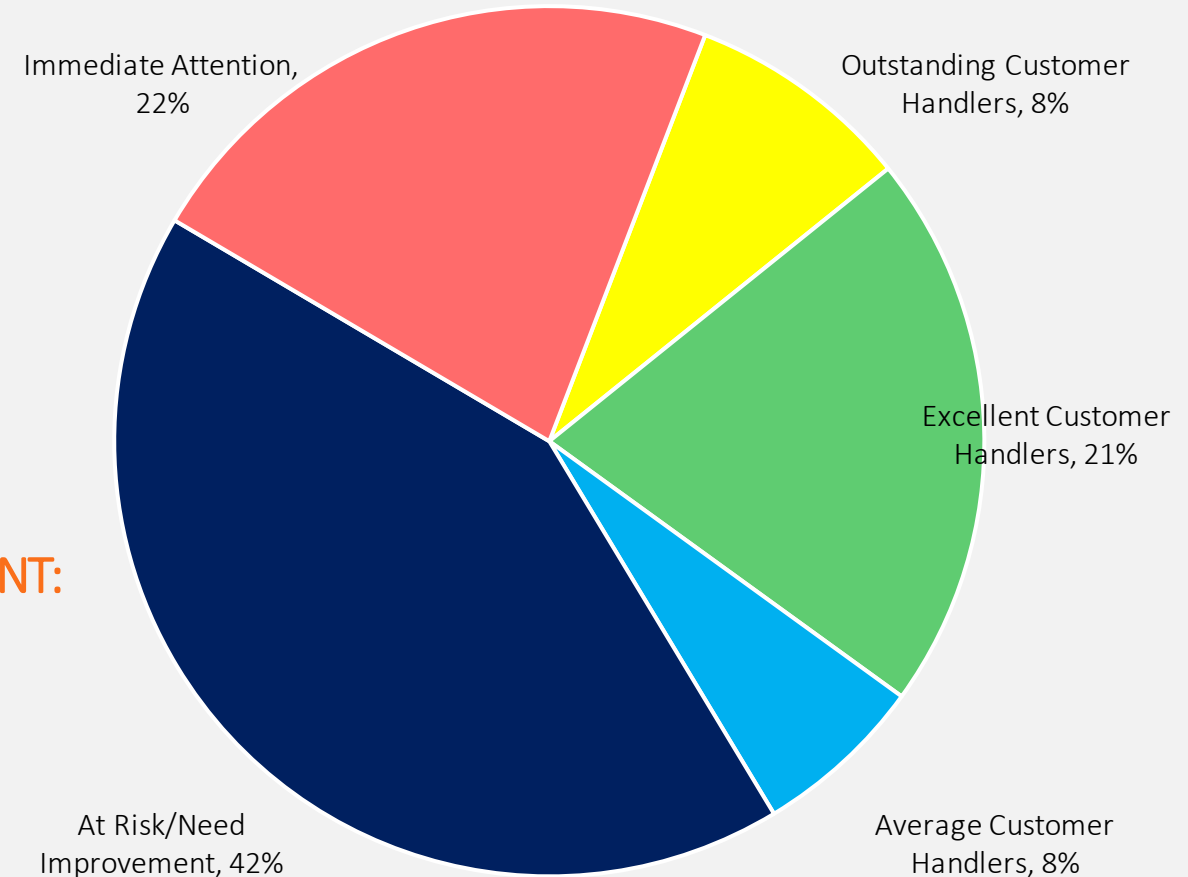No. of "Loyal" Accounts: 6
No. of "Top" Accounts: 3

22%   IMMEDIATE ATTENTION S.R. SEGMENT:
No. of "Need Attention" Accounts: 3
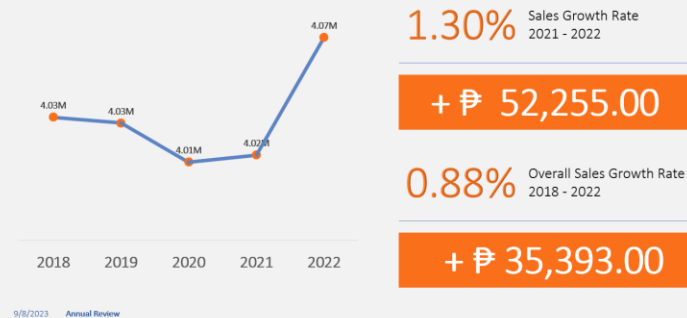No. of "At Risk" Accounts: 5
No. of "Loyal" Accounts: 3
No. of "Top" Accounts: 2

What's NEXT?
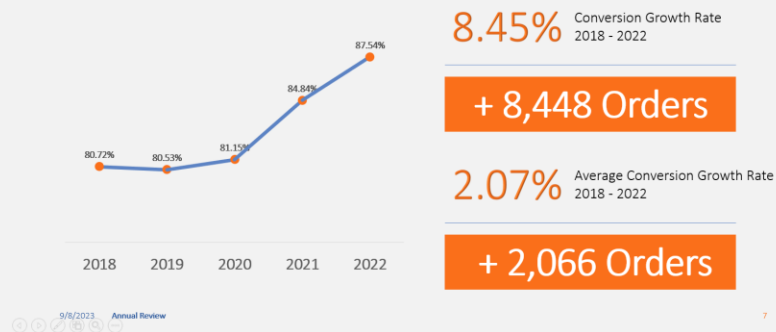
" Recognizing the performance differences empowers us to allocate resources wisely, offer precise support, and enhance success across our account portfolios. "

Juven Dale Colaste

SPARTA Scholar – Data Scientist Pathway