

# Effective sales methods

Insights and actions for "Pens and Printers" sales strategy

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# Project overview and business goals

## Background

The analysis was initiated in response to the launch of our new product line. Over a six-week period, the sales team implemented 3 distinct sales methods:

- 'Email': initial launch email + follow-up email 3 weeks after (minimal effort)
- 'Call': direct phone call to customers (30 min)
- 'Email and call': preliminary product information email + sales call (10 min) 1 week later

## Business goals

- Identify the most effective sales methodologies to focus on in order to maximize revenue
- Define a performance metric for the business to monitor in the future

# Methodology overview

## Data validation

- Cleaning, examination and standardization of sales data to ensure integrity and usability

## Exploratory data analysis

- Analyze customer counts per sales method, revenue distribution and patterns investigation

## Statistical experimentation

- Compare sales methods and evaluate impact on revenue, units sold, site visits and customer tenure

## Customer segmentation

- Analysis of customer behavior and geographic analysis of sales data by sales method

# Analysis objectives and key questions

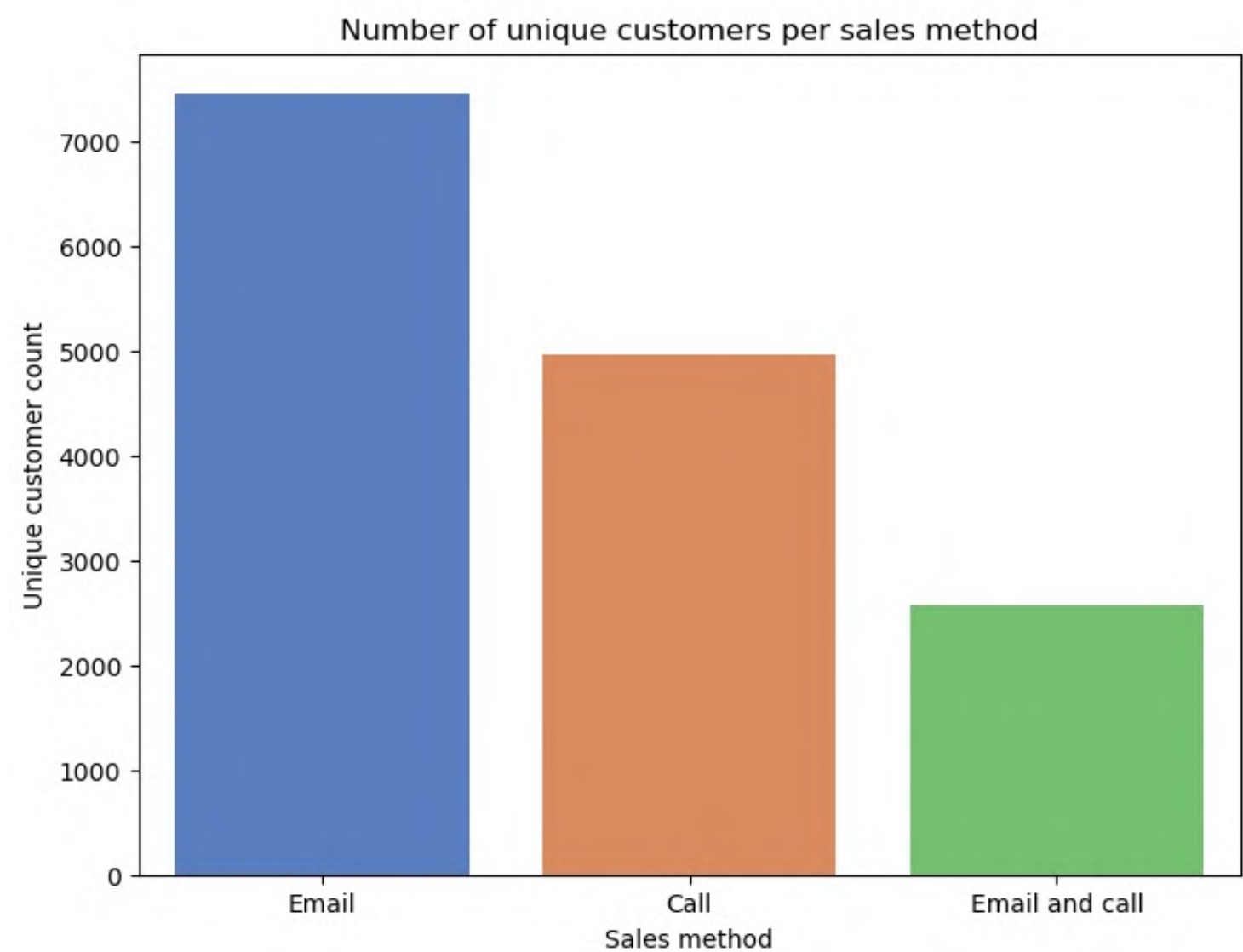
## Objectives

- Evaluate effectiveness of the 3 sales methods for revenue generation
- Analyze customer engagement and difference among customer groups
- Define the best sales approach
- Provide actionable insights and a key metric for ongoing performance assessment

## Key questions

- Which sales methodologies are most effective?
- How do sales methods influence customer behavior and revenue?
- What patterns and trends emerge from different sales methods?
- What strategic recommendations can be made?

# Unique customers count per sales method

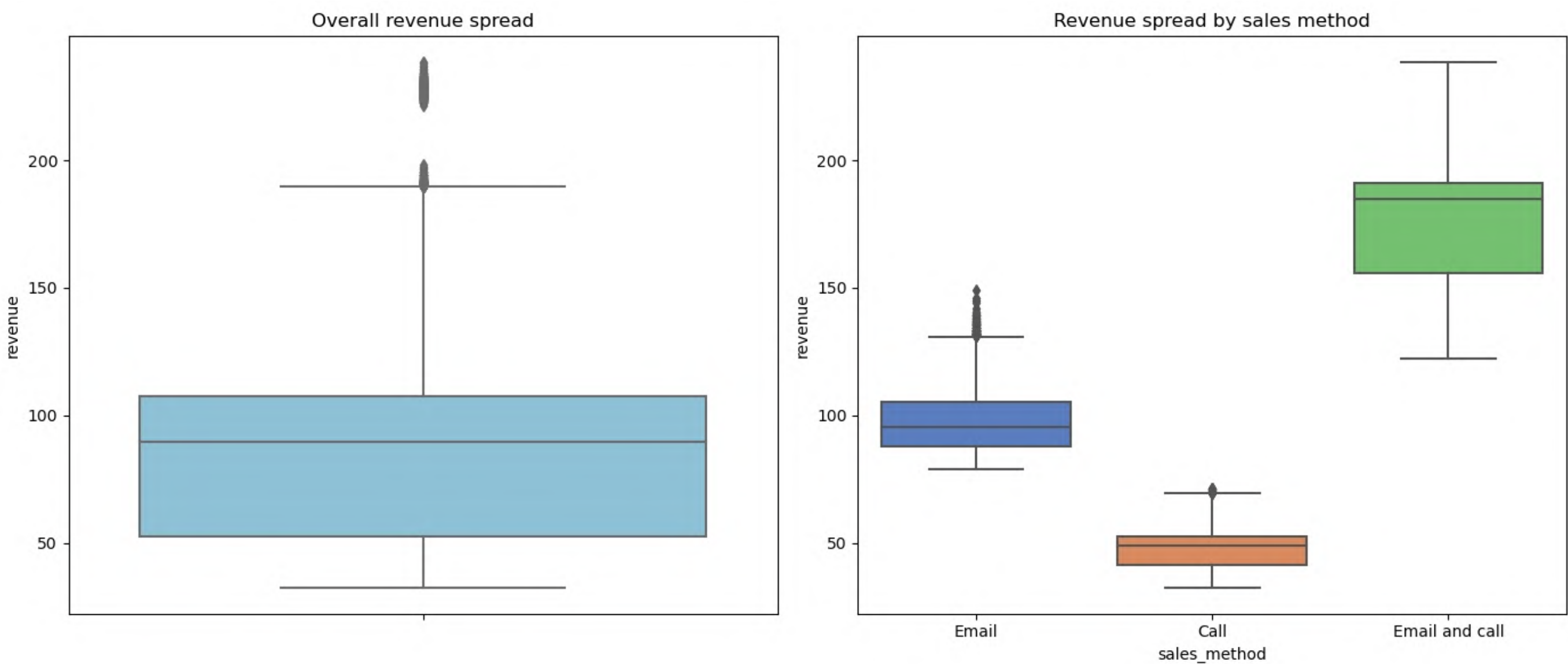


Customers by sales method	
	Unique customers
Email	7'466
Call	4'962
Email and call	2'572
Total	15'000

## Key insights

- Data shows only successful sales
- Each customer has made one purchase
- Most sales through Email (49.78%)
- Count might be influences by sales method preference from each sales team member

# Spread of total revenue



Median an IQR

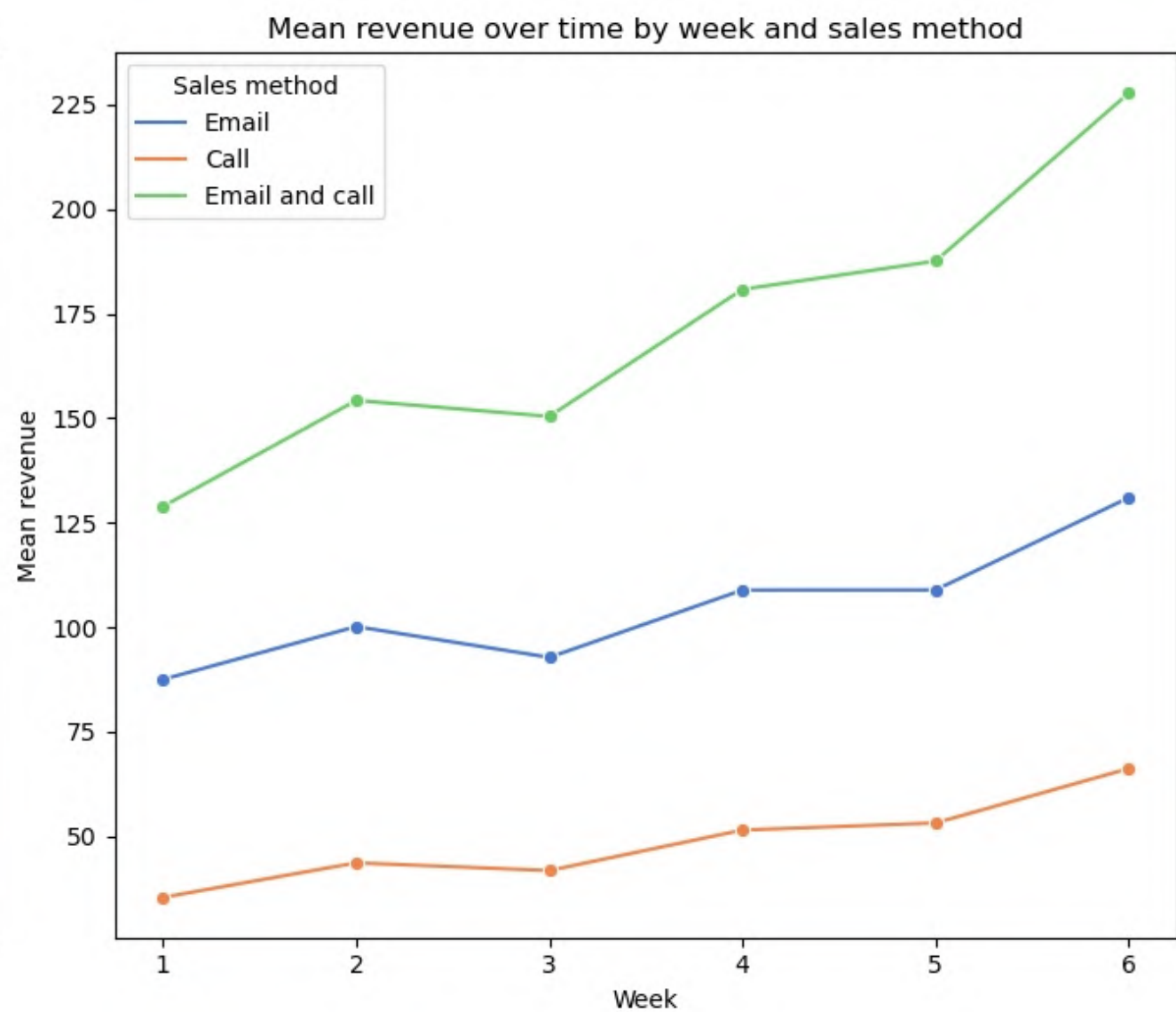
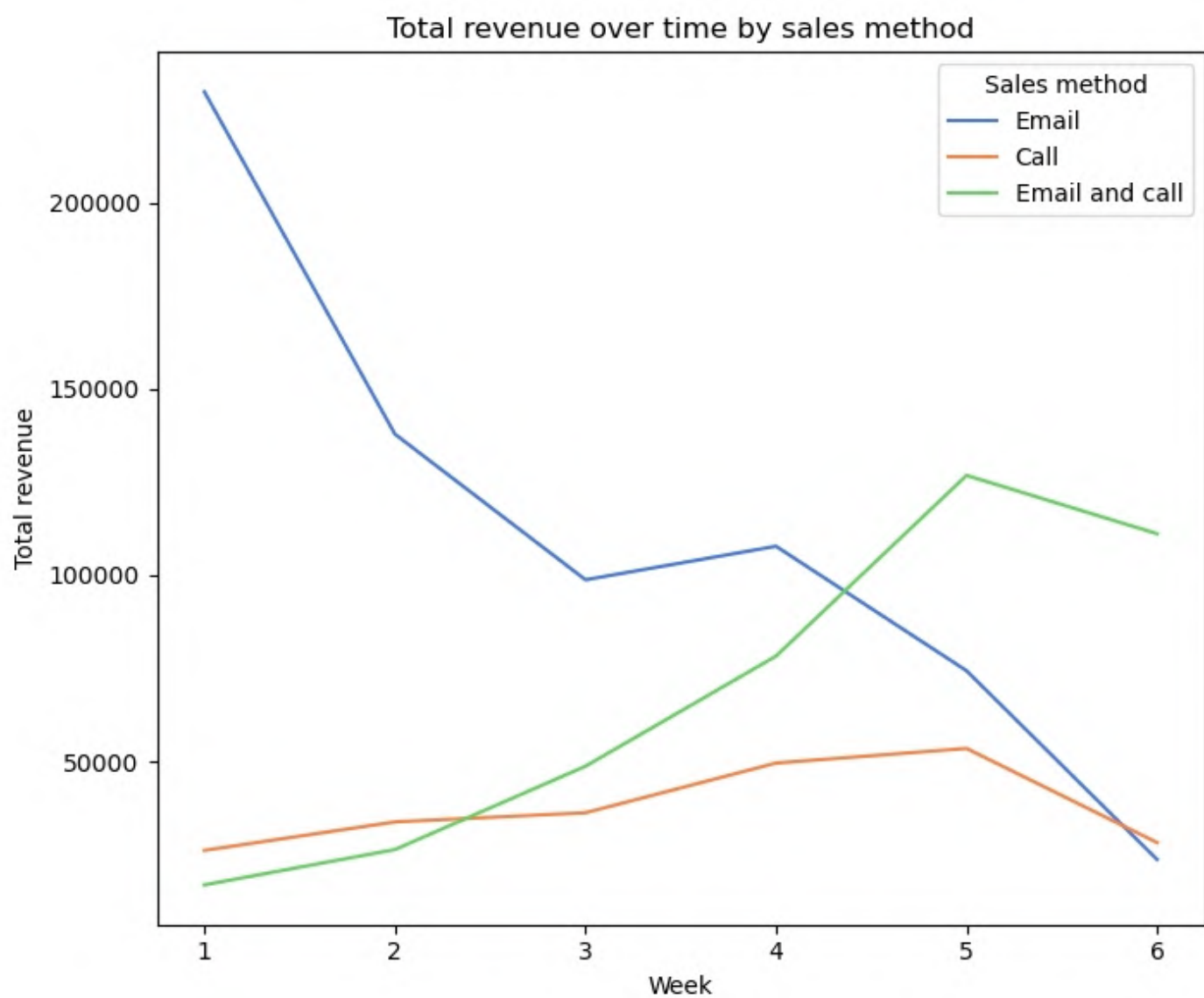
	Median Revenue	IQR
Overall	89.50	54.85
Email	95.58	17.29
Call	49.07	11.21
Email and call	184.74	35.33

Key insights

- Overall revenue: considerable spread
- IQR: Email and call > Email > Call
- Median revenue: Email and call > Email > Call
- E&C\*: widest IQR but highest-revenue values, suggesting combined method effectiveness

\*E&C = Email and call sales method

# Revenue over time by sales method



Mean revenue over time

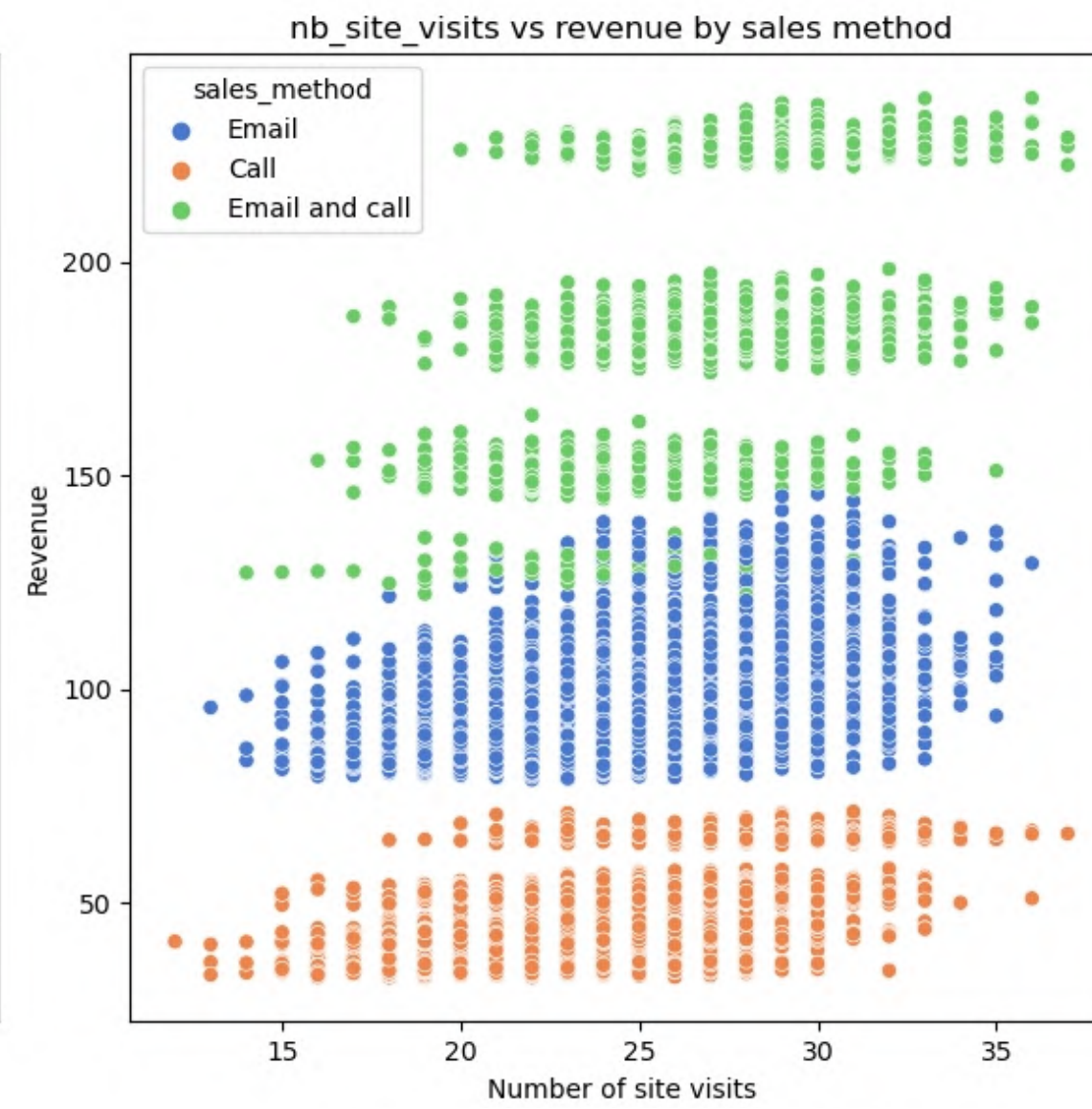
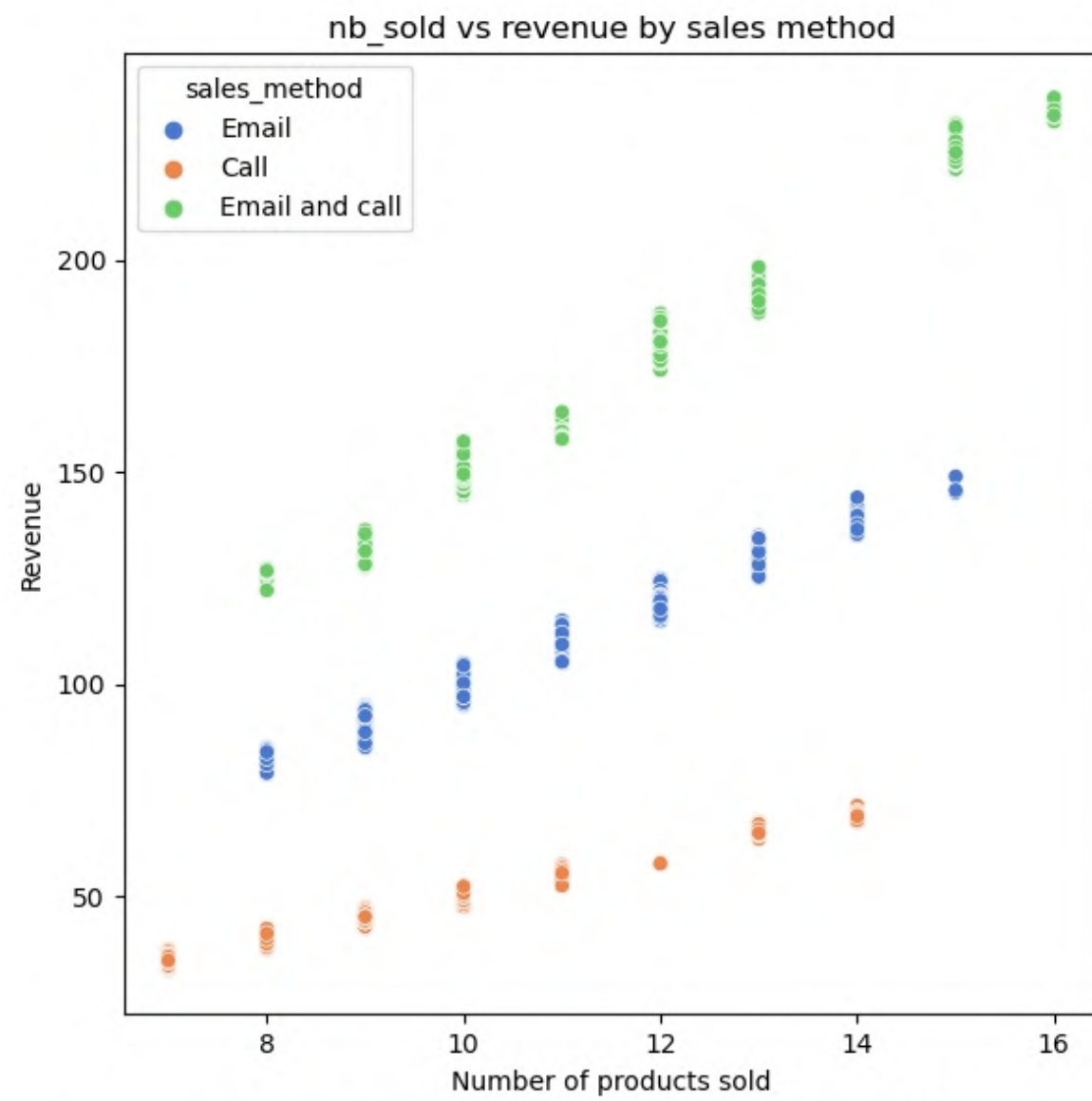
Week	Email	Call	E&C
1	87.50	35.35	128.90
2	100.14	43.60	154.25
3	92.76	41.76	150.42
4	108.88	51.45	180.82
5	108.89	53.15	187.59
6	130.98	66.17	227.77

## Key insights

- Email total revenue by week: negative trend
- E&C positive trend and highest mean revenue
- E&C capitalizes on combined approach



# Email and call is best at all levels



## Units sold vs revenue

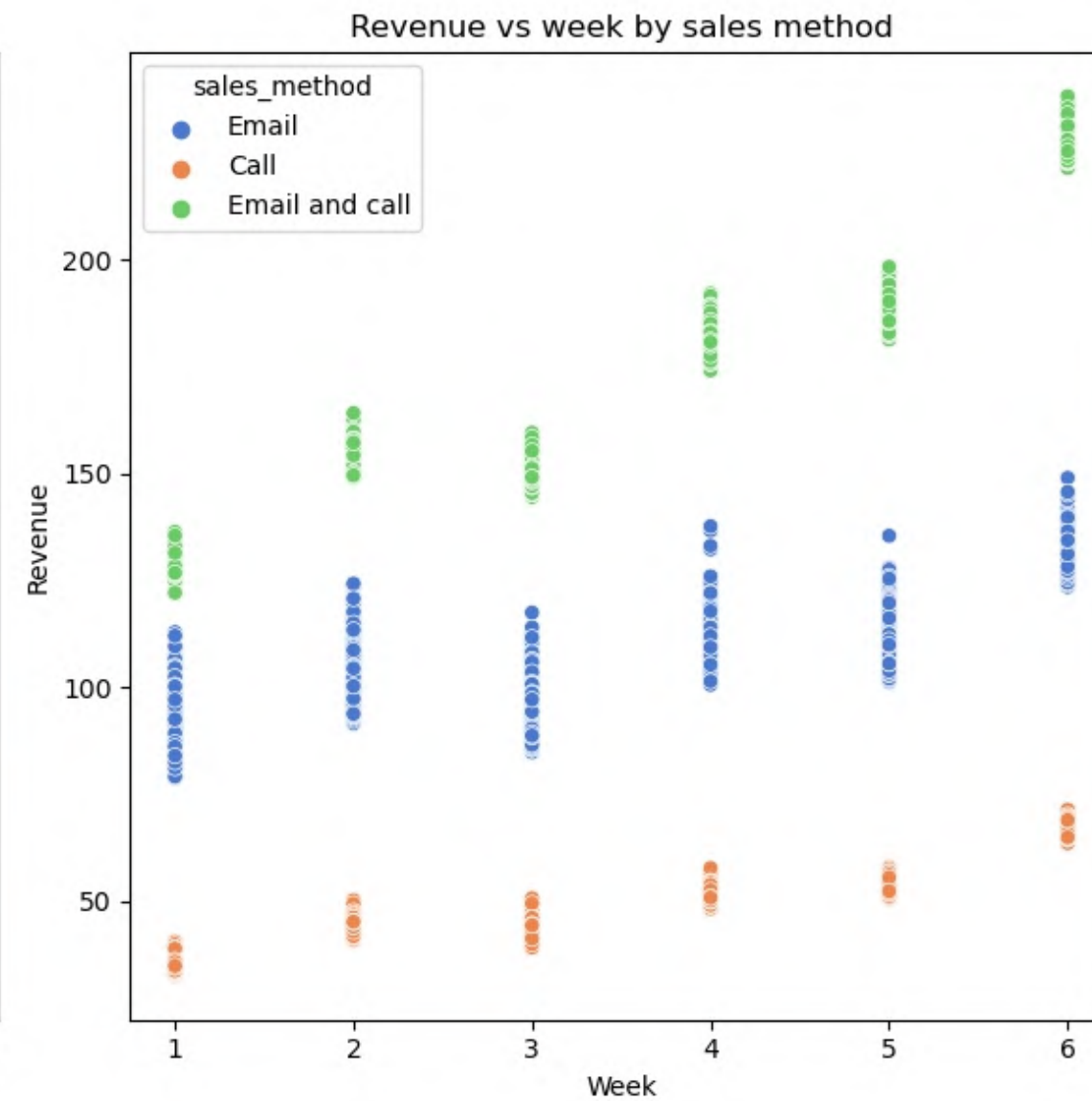
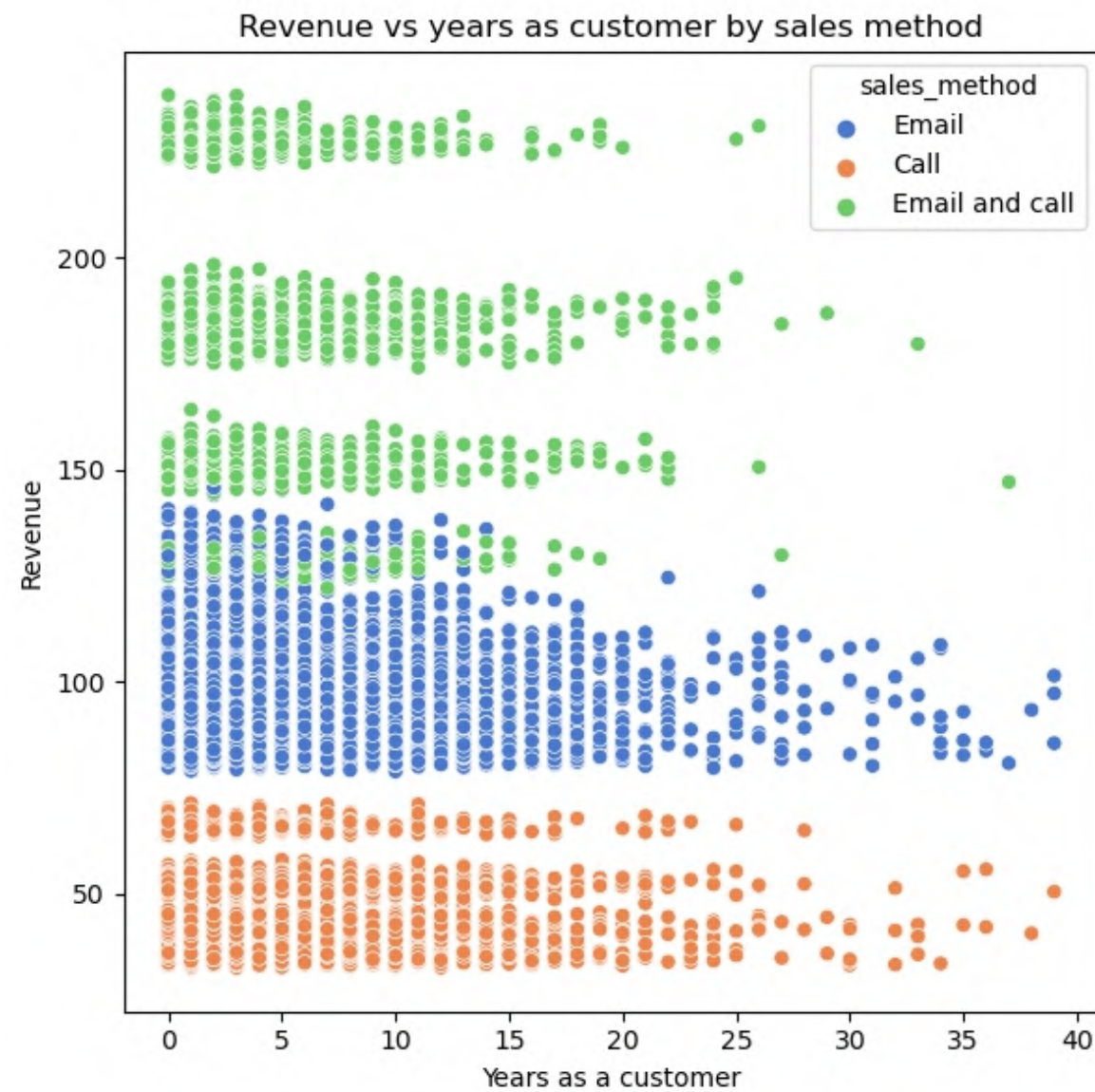
- Positive relationship
- E&C has the highest values at all units sold levels (more effective)

## N. site visits vs revenue

- N. site visits does not impact directly revenue
- E&C is the highest revenue sales method at all n. site visits levels



# Email and call is best at all levels



## Revenue vs years as customer

- No significant relationship between revenue generated and the n. years as a customer
- E&C confirms better revenue generation

## Revenue week over week

- E&C sales method is again the best performer, generating higher revenue per sale

# Customer insights

## Best sales method by state

- Email and call method always greatly outperforms other sales methods

## Purchase volume segmentation

- 34.33% are considered 'High volume' buyers as they purchase more than 10+ items (median value)

## Customers and revenue by geographical location

- >50% of both customers and revenue come from 9 states only (CA, TX, NY, FL, IL, PA, OH, MI, GA)

## Impact of sales methods on revenue, units, site visits and years as customer (statistical experimentation)

- Significant difference in mean revenue across method comparison → tangible effect on revenue generated

# Business metric to monitor:

## Moving median revenue per sale

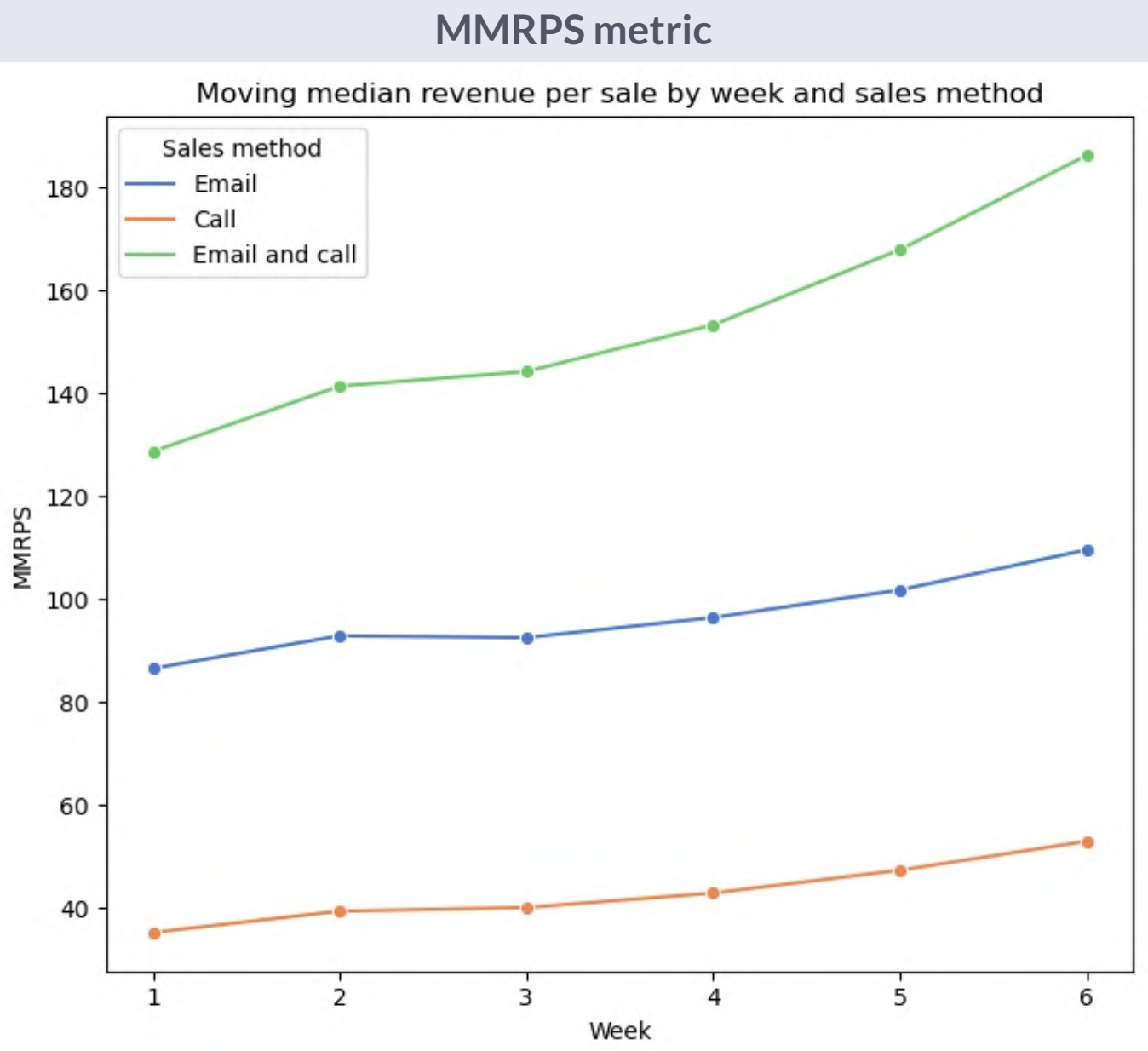
### Considerations about data

- Data only shows successful sales but no missed opportunities
- Initial sales figures could be inflated due to initial interest
- No insight about repeated purchases (one sale per customer)

### MMRPS with initial 4-week rolling period

- Identifies most lucrative sales method in terms of revenue
- Reflects impact on strategic changes allowing agile decisions
- Adaptable rolling window depending on business needs (i.e. business cycle, seasonal trends and specific strategic goals)
- Keep track of weekly time by sales method to confirm the most lucrative sales method generates the most total revenue

Try Pitch



MMRPS (4-week rolling period) initial values

	sales_method	1	2	3	4	5	6
0	Call	35.20	39.33	40.04	42.85	47.29	52.92
1	Email	86.54	92.89	92.53	96.42	101.79	109.59
2	Email and call	128.72	141.44	144.27	153.34	167.96	186.27

# Final recommendation: focus on Email and Call sales method

## Superior revenue generation

- Highest median and moving median revenue per sale, indicating more effective sales per customer

## Consistent performance growth

- Strongest week over week improvement, reflecting increasing sales efficacy

## High-value transaction focus

- Outperforms in securing high-revenue sales, demonstrating strategic importance

## Cost-benefit advantage

- Time invested in Email and subsequent 10 min. call justified by higher revenue outcomes

## Data quality improvement

- Implement routing data validation process to check for and address missing entries and discrepancies