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Sales Performance Dashboard

Senior Data Analyst – Take-Home
Assessment

Natalia Acevedo Casallas

July 2025

Summary Dashboard

Sales rep ID ▾   Select date range ▾   ◆ ghost

80.1%
% of Buyers with Wishlist data filled in

77.8%
Buyer Interested Record

41h
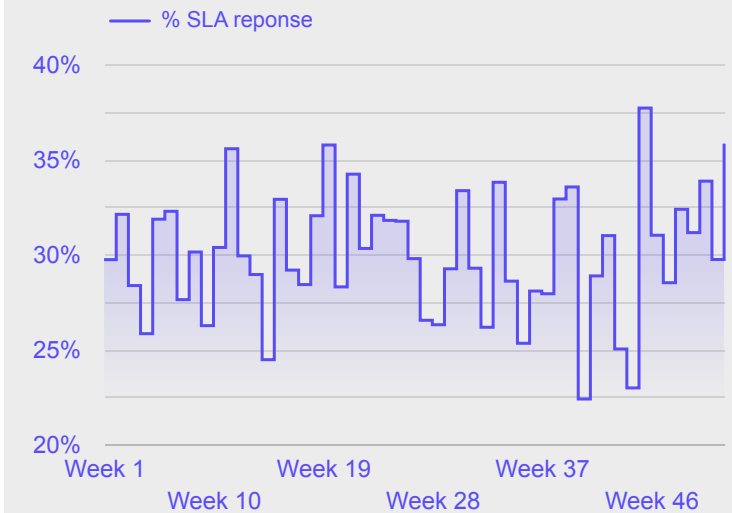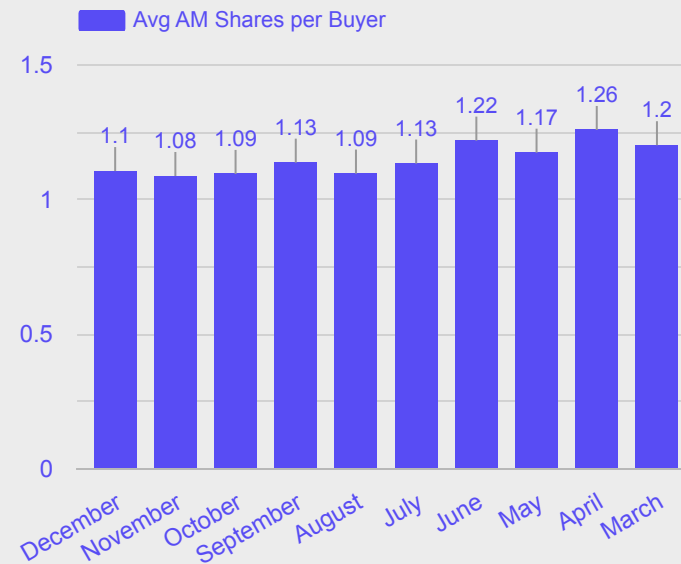AVG time between Call/Email & Logged Note

3.83%
% of Wishlist data updated in last 30 days

3.45
AM Share Ratio

30.0%
% SLA response

Buyer Interested Record (line chart, January–November, 75%–95%)

Avg AM Shares per Buyer (bar chart)

December	November	October	September	August	July	June	May	April	March
1.1	1.08	1.09	1.13	1.09	1.13	1.22	1.17	1.26	1.2

% SLA reponse (step chart, Week 1–Week 46, 20%–40%)

Summary Dashboard

Sales rep ID ▾   Select date range ▾

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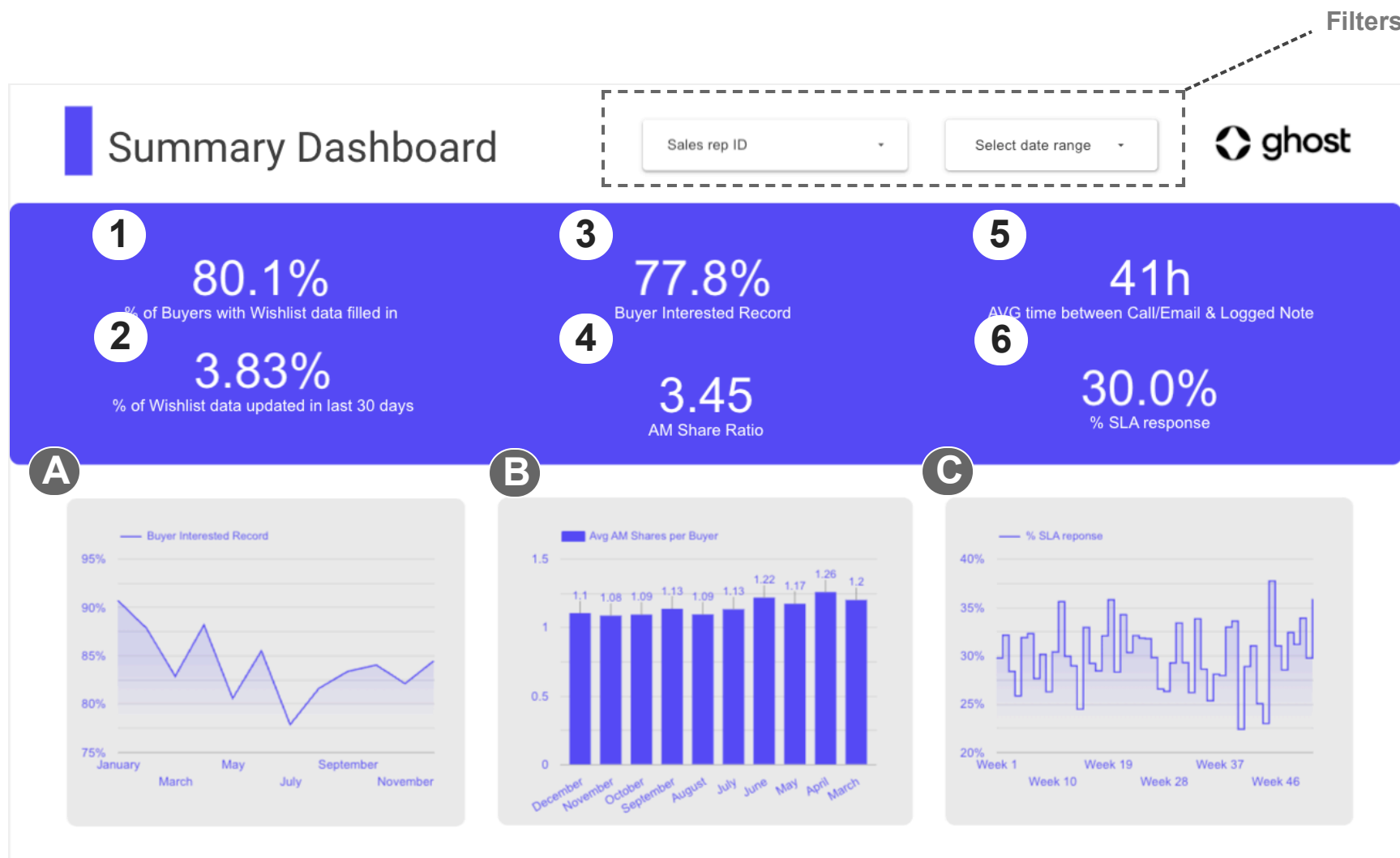| 1 | **80.1%** % of Buyers with Wishlist data filled in | 3 | **77.8%** Buyer Interested Record | 5 | **41h** AVG time between Call/Email & Logged Note |
| 2 | **3.83%** % of Wishlist data updated in last 30 days | 4 | **3.45** AM Share Ratio | 6 | **30.0%** % SLA response |

A — Buyer Interested Record (Line Trend)

B — Avg AM Shares per Buyer: 1.1, 1.08, 1.09, 1.13, 1.09, 1.13, 1.22, 1.17, 1.26, 1.2 (December, November, October, September, August, July, June, May, April, March)

C — % SLA reponse (Weekly, Week 1 – Week 46)

Trend Visuals

A. Buyer Interested Record (Line Trend): Shows weekly compliance; dips highlight weeks where reps skipped logging interest before pushing deals forward.

B. Avg AM Shares per Buyer (Monthly Bars): Displays listing-curation cadence; spikes or lulls uncover shifting engagement with buyers.

C. % SLA Response (Weekly Line): Tracks SLA adherence over time; volatility pinpoints periods needing coaching on timely follow-ups.

Screenshot summary Annotations

KPI & Chart Annotations

1. % of Buyers with Wishlist Data Filled In – Measures overall wishlist completeness; keep ≥ 90 % so reps can send truly relevant listings.

2. % of Wishlist Data Updated in Last 30 Days – Tracks freshness of buyer preferences; low value flags stale data that needs refreshing.

3. Buyer Interested Record – Share of deals that reached Offer Submitted only after a "Buyer Interested" date was logged; shows process discipline.

4. AM Share Ratio – Total AM shares ÷ total buyers; reveals how actively reps curate listings for their book of business.

5. AVG Time Between Call/Email & Logged Note – Average hours reps take to document interactions; shorter time = healthier CRM hygiene.

6. % SLA Response – Percentage of notes logged within the 24-hour weekday SLA; monitors follow-through speed on buyer communications.

Buyer Detail Dashboard

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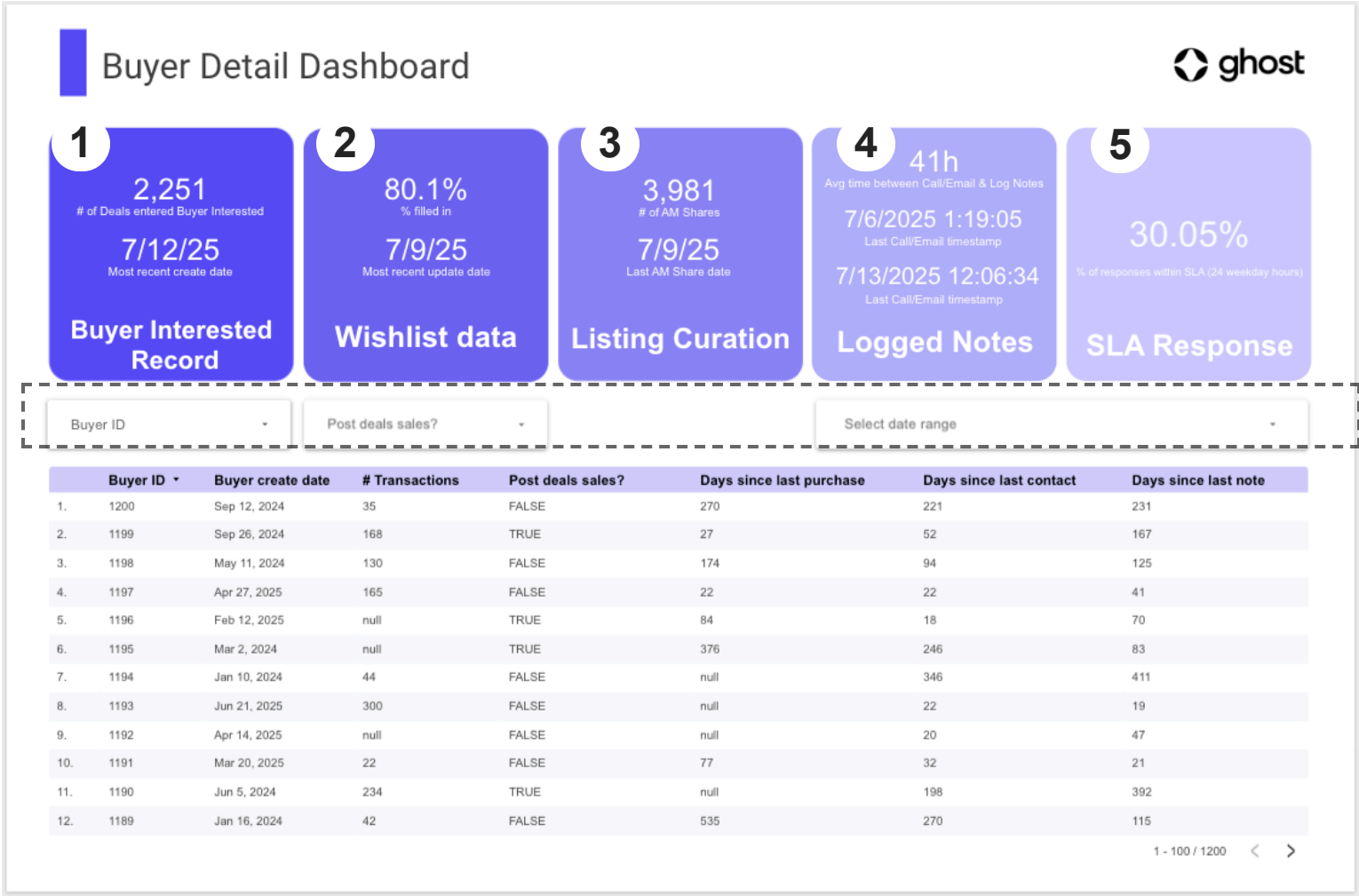| Buyer Interested Record	Wishlist data	Listing Curation	Logged Notes	SLA Response
2,251 \# of Deals entered Buyer Interested **7/12/25** Most recent create date	**80.1%** % filled in **7/9/25** Most recent update date	**3,981** \# of AM Shares **7/9/25** Last AM Share date	**41h** Avg time between Call/Email & Log Notes **7/6/2025 1:19:05** Last Call/Email timestamp **7/13/2025 12:06:34** Last Call/Email timestamp	**30.05%** % of responses within SLA (24 weekday hours)

Buyer ID ▾　　Post deals sales? ▾　　Select date range ▾

	Buyer ID ▾	Buyer create date	# Transactions	Post deals sales?	Days since last purchase	Days since last contact	Days since last note
1.	1200	Sep 12, 2024	35	FALSE	270	221	231
2.	1199	Sep 26, 2024	168	TRUE	27	52	167
3.	1198	May 11, 2024	130	FALSE	174	94	125
4.	1197	Apr 27, 2025	165	FALSE	22	22	41
5.	1196	Feb 12, 2025	null	TRUE	84	18	70
6.	1195	Mar 2, 2024	null	TRUE	376	246	83
7.	1194	Jan 10, 2024	44	FALSE	null	346	411
8.	1193	Jun 21, 2025	300	FALSE	null	22	19
9.	1192	Apr 14, 2025	null	FALSE	null	20	47
10.	1191	Mar 20, 2025	22	FALSE	77	32	21
11.	1190	Jun 5, 2024	234	TRUE	null	198	392
12.	1189	Jan 16, 2024	42	FALSE	535	270	115

1 - 100 / 1200 ‹ ›

Buyer Detail Dashboard

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1
2,251
# of Deals entered Buyer Interested
7/12/25
Most recent create date
Buyer Interested Record

2
80.1%
% filled in
7/9/25
Most recent update date
Wishlist data

3
3,981
# of AM Shares
7/9/25
Last AM Share date
Listing Curation

4
41h
Avg time between Call/Email & Log Notes
7/6/2025 1:19:05
Last Call/Email timestamp
7/13/2025 12:06:34
Last Call/Email timestamp
Logged Notes

5
30.05%
% of responses within SLA (24 weekday hours)
SLA Response

Buyer ID ▼ | Post deals sales? ▼ | Select date range ▼

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1 - 100 / 1200 ‹ ›

Filters

Table columns

Buyer ID: Unique buyer reference; click to drill further if enabled.

Buyer create date: Date the buyer was first added to HubSpot – helps gauge account age.

 # Transactions: Total closed-won deals for this buyer; gauges revenue depth.

Post-Sales Deal?: Indicates whether buyer currently has an active post-sales process.

Days since last purchase: Customer dormancy; high number = renewal or cross-sell risk.

Days since last contact: Time since the rep's last call/email; highlights outreach gaps.

Days since last note: Time since the last CRM note was logged; flags logging discipline issues.

KPI's explanation

1. Buyer Interested Record: Shows volume and recency of genuine buyer interest for this rep's book of business.

2. Wishlist Data: Highlights data completeness and freshness of buyer preferences.

3. Listing Curation: Measures how actively the rep is curating listings for buyers and the last touch.

4. Logged Notes: Surfaces CRM-hygiene lag and the most recent communication recorded.

5. SLA Response: Shows compliance with the response-time commitment; low value signals coaching need.
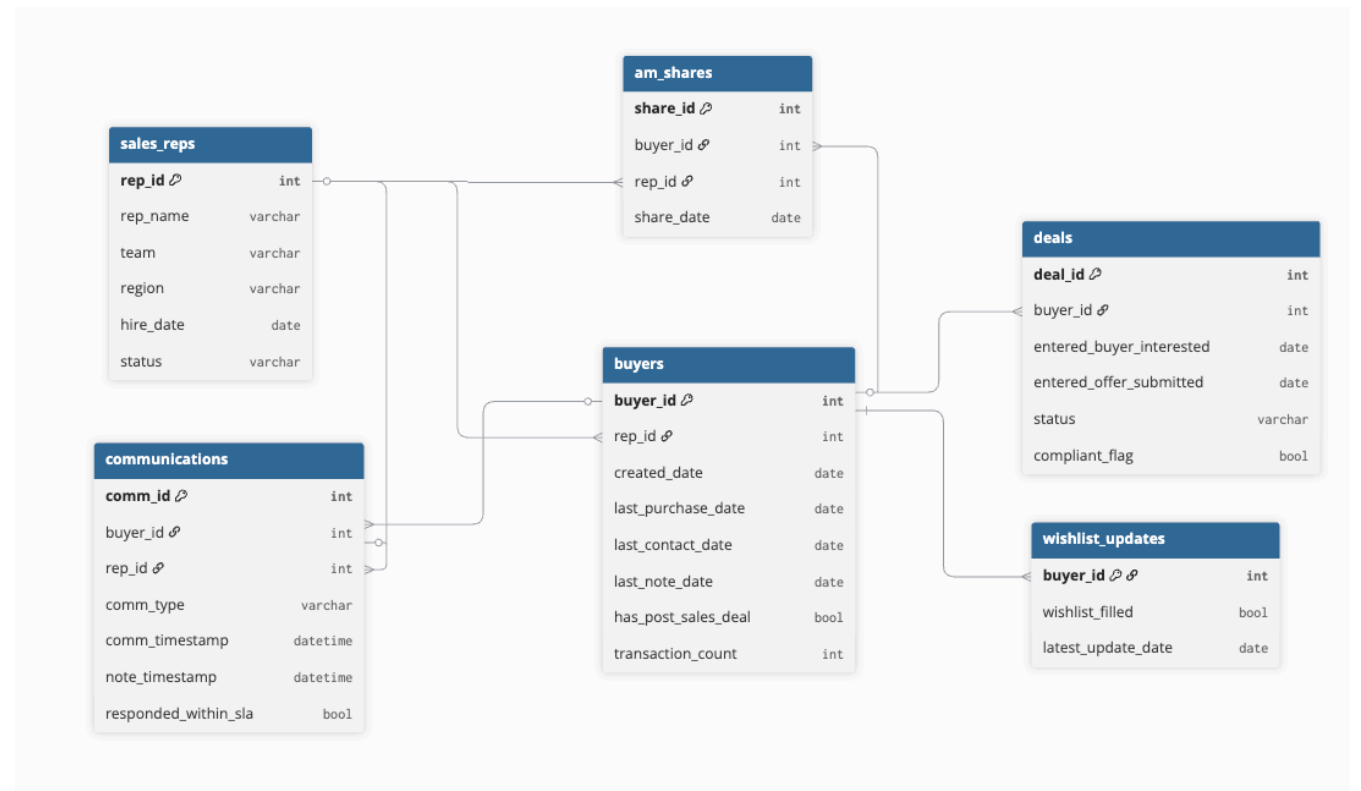
Dataset & Dashboard Usage

For this assessment, I generated **six** synthetic tables, each with well over a thousand rows, to emulate a realistic sales-ops environment.

Having a rich, relational dataset made it possible to design visualisations that behave exactly like a live production dashboard and to ground every KPI in plausible numbers. The tables cover:

- Sales-rep roster
- Listing-curation activity
- Call-note / SLA telemetry
- Buyer master data
- Deal milestones
- Wishlist freshness

After populating the tables, I built a **star-style data model (*Diagram*)** that joins them on two natural keys (rep_id and buyer_id). This model underpins both dashboards, allowing a single Sales-Rep or Date-Range filter to cascade across every metric and trend line. All six tables—and the underlying joins—are stored in a [public Google Sheet](#) so reviewers can explore the raw data or replicate the KPIs at will.

star-style data model Diagram