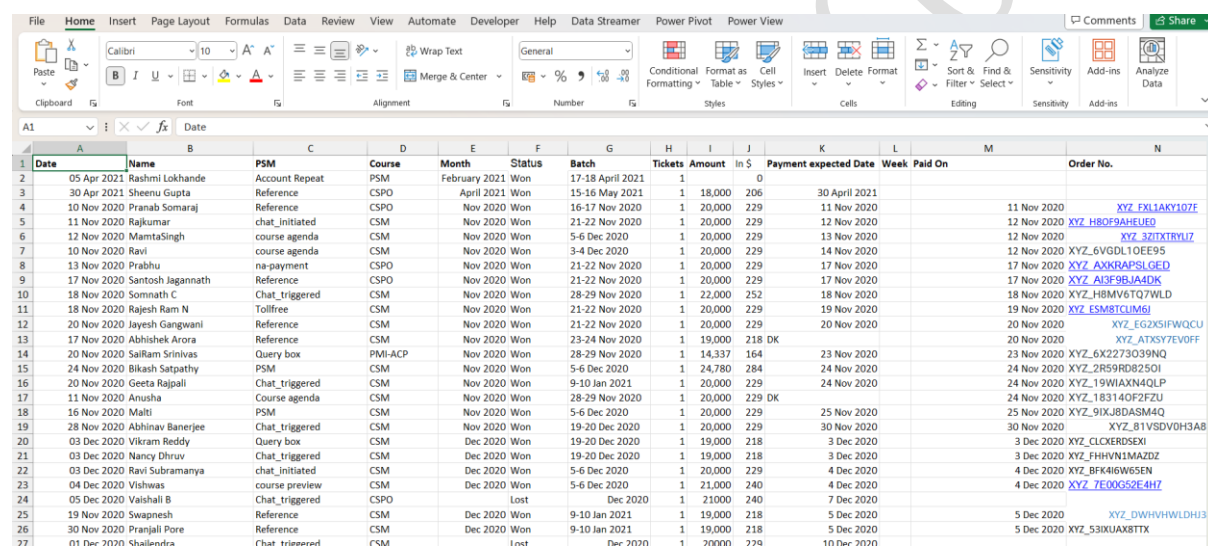# Agile Sales Performance – Case Study

Objective:[i]

To understand my sales performance of Agile category in Simplilearn from Nov-2020 to May-2023. Also, to understand the trend of the courses sold, lead sources by monthly, quarterly, and yearly.

Data Collection:

Data was collected timely as soon as the sale was closed. The entry was entered manually in the google sheet which was maintained regularly. The duplicates can be found in the data but they refer as repeat learners hence, not to be confused as errored repeat data instead, the learner must've taken another course in a different timeline or as combo. Considering the data privacy, learners email id and number is removed from the dataset as it may not be relevant for the analysis.

Data Info:

#Columns – 18

#Rows – 1684 (Includes header and Status – Lost as well)

Column Details:

- Date – Date format
- Name – Text
- PSM (Primary Site Module/ Lead Source) – Text
- Course – Text
- Month(Month of enrolled date) – Date format
- Status(Won/Lost) – Text
- Batch(Batch of the course enrolled cx enrolled) – Date format
- Tickets(# of tickets sold) – Number
- Amount(With tax) – Currency in INR
- In $(Without tax) - Currency in $

- Payment expected date – Date format
- Week(Week of the month payment received) – Text
- Paid On(Cx enrolled date) – Date format
- Order No.(Order Id) – Text
- Comments(Mentioned about the feedback and references) - Text
- Program Details(If program details shared/feedback) – Text
- Category(Category of the courses divided as follows
  - CSM, CSPO, PMI-ACP – As "Category"
  - PSM, PSM 2, PSPO, PSPO 2, ICP-ACC, and all SAFe programs – As "SAFe que"
  - Other courses that doesn't fall under Agile umbrella categorised – As "Non-Category" (Ex – PMP, BA Masters, ITIL etc)
- Target(Monthly Target) – Currency

Data Cleaning:

Started the data cleaning process:

- Started by adding filters to all columns, checked for blank cells in all the columns. Filled the missing values with the relevant data.
- Checked for data formatting – data types for each column corrected the data types for the Date, Month, Amount, In $, Payment Expected Date, Paid On – columns.
- Created Year and Target column in the worksheet.
- Removed the data which has the Status – Lost, these data with this status refers to the lost sale. For this project, only Sales with the Status - Won are considered (1443 rows including headers).
- Duplicate of the names or email ids are not removed and shouldn't be removed in this case because, here we've repeat learners who has come back and have taken other courses after the 1st course they've completed also in some cases, learner might've taken 2 or more courses as combo, along with this, other scenario is where a learner has paid for a particular course like PMP in 2 instalments (2 different order ids). Hence, duplicate names should be considered as repeat learners.
- Converted the entire workbook to Table for the analysis (In the Excel Workbook).

Analysis of the data:

(Created Pivot Tables in the Excel Workbook project and in Google sheets project.)

Created Agile Sales Performance dashboard in the Excel Workbook project, Google sheets project as well as in the Looker Studio – Data studio. Here, below the Screenshots are from the Looker Studio (Data Studio) report.

Access the Looker Studio Dashboard here –
https://lookerstudio.google.com/reporting/ae67f891-9295-4d99-a289-5e61c5f88c35

Report Findings:

- Consistent Revenue generation – on an Avg. $16.43 with tax and Avg. $13.93 without taxes month on month.
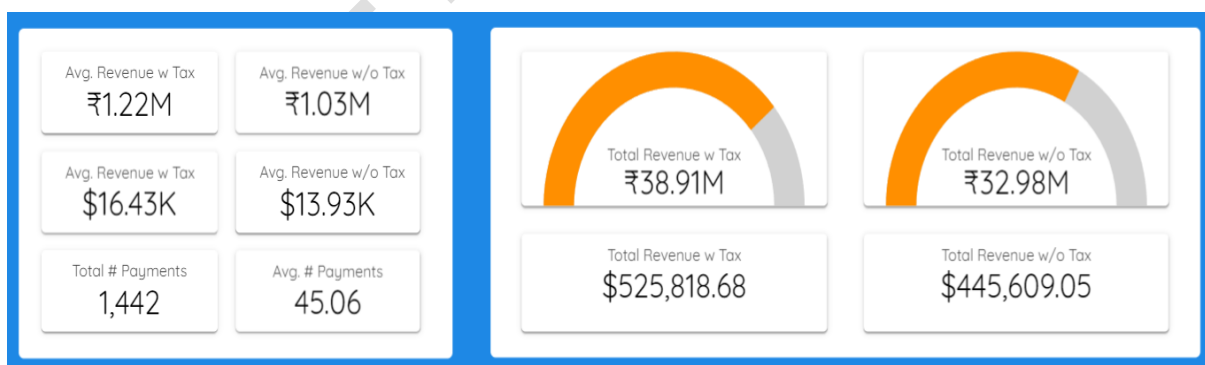
- Consistency of 75% hitting the given target month on month despite increase in targets abruptly between months.
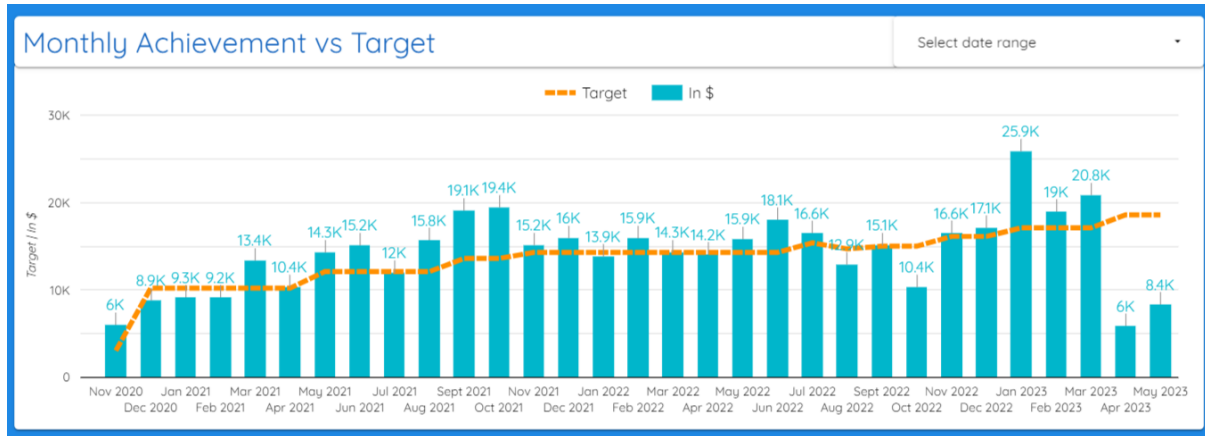
- From the sales trend it is seen that the highest sales for the year comes in JFM – Q1 $141,862 (Q4 for the end of financial year) by 1.5X higher compared to other quarters. The reason can be narrowed down to the company approvals for the certifications, as the financial year closes lot of learners get approvals for the certification reimbursements for upskilling.
- Similarly, the least performing quarter is JAS – Q3 (Q2 as per the financial year) with the Avg. Revenue of $91,536. Reasons can be narrowed down to the festival season of Ganesh Chaturthi, Dussehra, Diwali. But eventually, the numbers shall slowly increase for Nov and Dec as the festive season subsides (this is purely for Indian Market only).
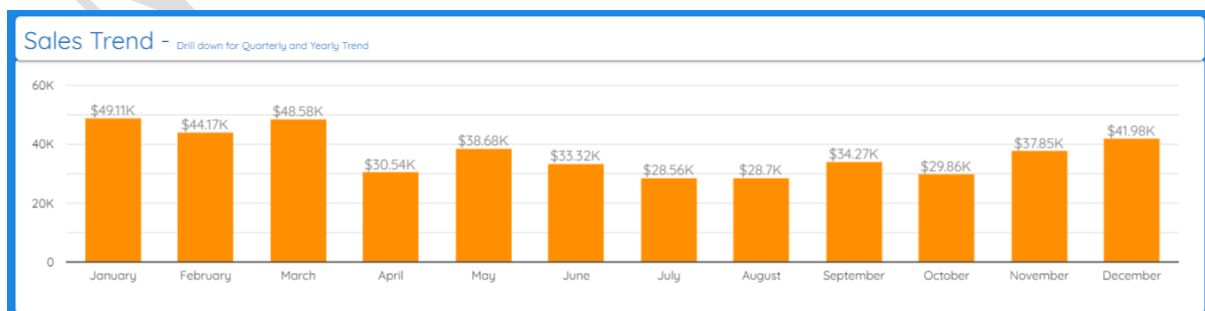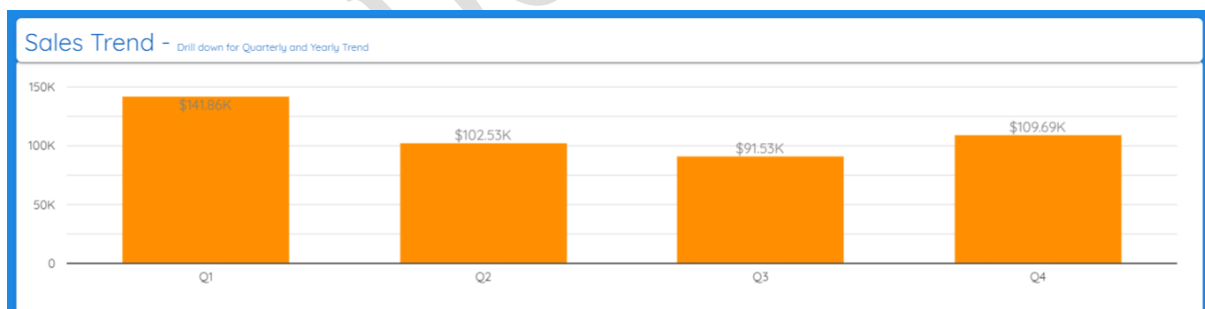
- With respect to courses – revenue and # of tickets contribution mainly comes from the following courses,
  - SAFe Agile – 21.5% revenue
  - PSM – 15.58% revenue
  - CSM – 15.35% revenue
  - PSM 2 – 8.13% revenue
  - PSPO – 7.62% revenue

  It is to note that SAFe Agile course has an ASP of at least $450-$500 where as PSM, CSM, PSM 2 and PSPO has ASP between $220 - $270. Hence, the SAFe Agile course has less % of Nominations to higher % of Revenue.

Courses vs %Revenue and %Nominations

	Course	Pct_Revenue	Pct_Nominations
1.	SAFe Agile	21.49%	13.66%
2.	PSM	15.58%	19.49%
3.	CSM	15.35%	20.67%
4.	PSM 2	8.13%	9.15%
5.	PSPO	7.62%	9.78%
6.	SAFe POPM	6.44%	4.09%
7.	CSPO	5.99%	8.32%
8.	SAFe SSM	1.99%	1.25%
9.	Implementing SAFe	1.77%	0.07%
10.	PMP	1.4%	2.08%
	Grand total	100%	100%
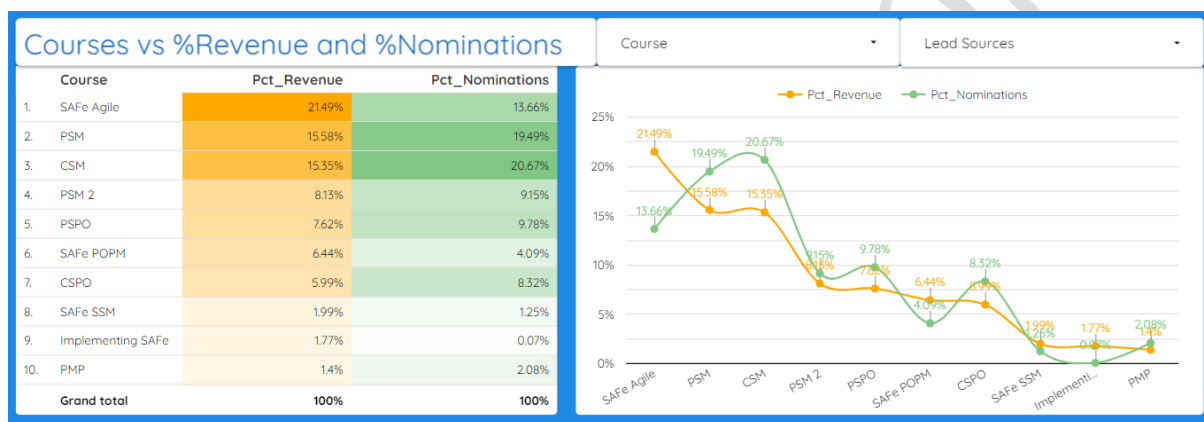
- Similarly, w.r.t the Lead Sources, References take the top spot with the contribution of 32.23% of revenue towards the overall revenue generated, followed by Chat_triggered – 14.01%, Existing Account – 13.26%, Query box – 11.76%, and chat_initiated – 10.6% contribution towards the revenue.

  This data clearly shows how the category can generate revenue efficiently on Reference business with the highest contribution and based on service Existing Accounts i.e. repeat learners come under top 5 Lead Source contribution towards the revenue.

Lead Sources vs %Revenue and %Nominations

	Lead Source	Pct_Revenue	Pct_Nominations
1.	Reference	32.23%	34.67%
2.	Chat_triggered	14.01%	13.8%
3.	Existing Account	13.26%	10.75%
4.	Query box	11.76%	11.86%
5.	chat_initiated	10.6%	9.99%
6.	course agenda	6.61%	6.87%
7.	Tollfree	4.54%	4.58%
8.	na-payment	1.71%	1.66%
9.	refer&earn	1.09%	1.18%
10.	course preview	1.04%	1.32%
	Grand total	100%	100%
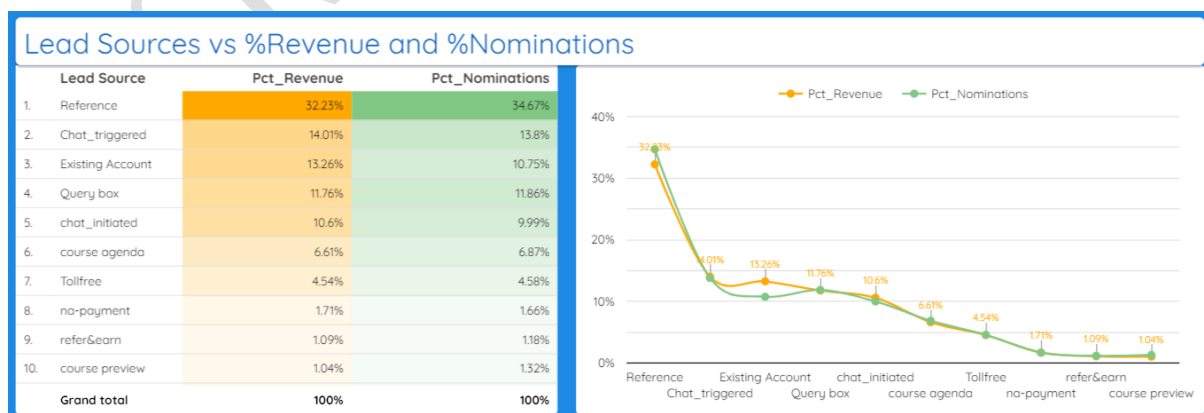
- On further deep dive of References, it is seen that highest reference from the existing learners is given for the following top 5 courses,
    - CSM – 18.93% revenue
    - SAFe Agile – 15.16% revenue
    - PSM – 13.82% revenue
    - PSM 2 – 13.21% revenue
    - CSPO - 10.47% revenue

  % of nominations is lesser for SAFe Agile as the ASP for the course is higher ($450 – $500) compared to CSM, PSM, PSM 2 and CSPO.

Courses vs %Revenue and %Nominations

	Course	Pct_Revenue	Pct_Nominations
1.	CSM	18.93%	23.8%
2.	SAFe Agile	15.16%	9.4%
3.	PSM	13.82%	16.6%
4.	PSM 2	13.21%	13.8%
5.	CSPO	10.47%	13.8%
6.	PSPO	5.82%	7%
7.	SAFe POPM	5.34%	3.2%
8.	MBA IU LSBU	2.95%	0.2%
9.	ITILv4	2.14%	2%
10.	PSPO 2	2.11%	2.2%
	Grand total	100%	100%
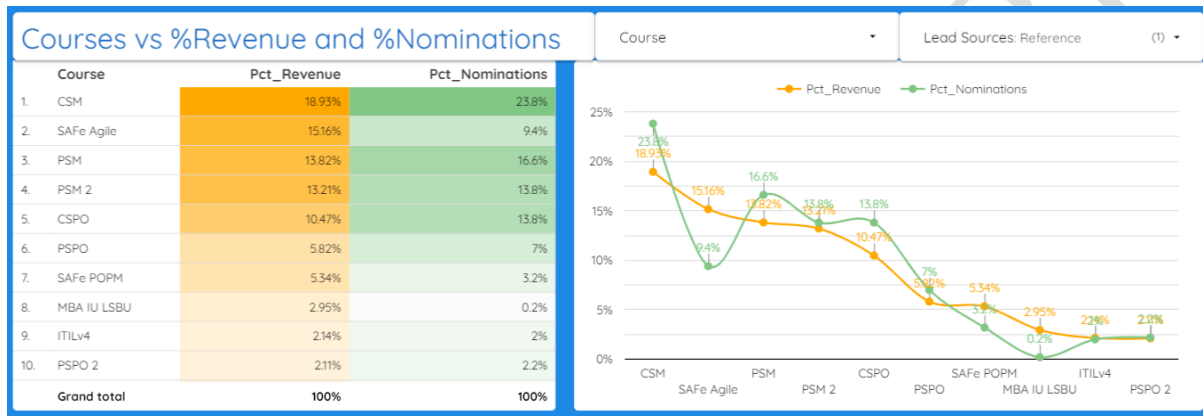
- Similarly, w.r.t Existing Accounts the repeat learners have majorly come back for the following courses,
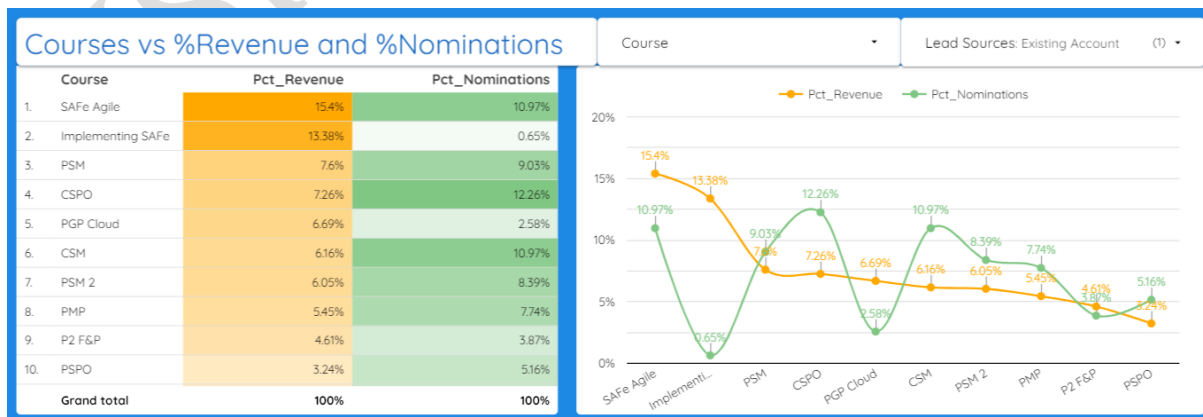   - SAFe Agile – 15.4% revenue
    - PSM – 7.6% revenue
    - CSPO – 7.26% revenue
    - CSM – 6.16% revenue
    - PSM 2 – 6.05% revenue

  From the report, Implementing SAFe and PGP Cloud is neglected as the % nominations is very less compared to major category courses.

Courses vs %Revenue and %Nominations

	Course	Pct_Revenue	Pct_Nominations
1.	SAFe Agile	15.4%	10.97%
2.	Implementing SAFe	13.38%	0.65%
3.	PSM	7.6%	9.03%
4.	CSPO	7.26%	12.26%
5.	PGP Cloud	6.69%	2.58%
6.	CSM	6.16%	10.97%
7.	PSM 2	6.05%	8.39%
8.	PMP	5.45%	7.74%
9.	P2 F&P	4.61%	3.87%
10.	PSPO	3.24%	5.16%
	Grand total	100%	100%

Bottom Line:

- SAFe Agile, PSM, PSM 2, PSPO, CSM are really in good demand throughout the year.
- Outstanding performance comes for JFM quarter with the highest sales.
- Considering the good service and quality of the training, the References (32.23% revenue) and Existing Accounts (13.26% revenue) business are the game changers for the category business growth as both Lead Sources alone contributing up to 46% of business.

Access the Looker Studio Dashboard here –
https://lookerstudio.google.com/reporting/ae67f891-9295-4d99-a289-5e61c5f88c35

Access the Dataset here - https://docs.google.com/spreadsheets/d/1C86-6IYvNlJ7rYoAK7z9Q-e5933DzW1i_c50vPGn9Z8/edit?usp=sharing

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