

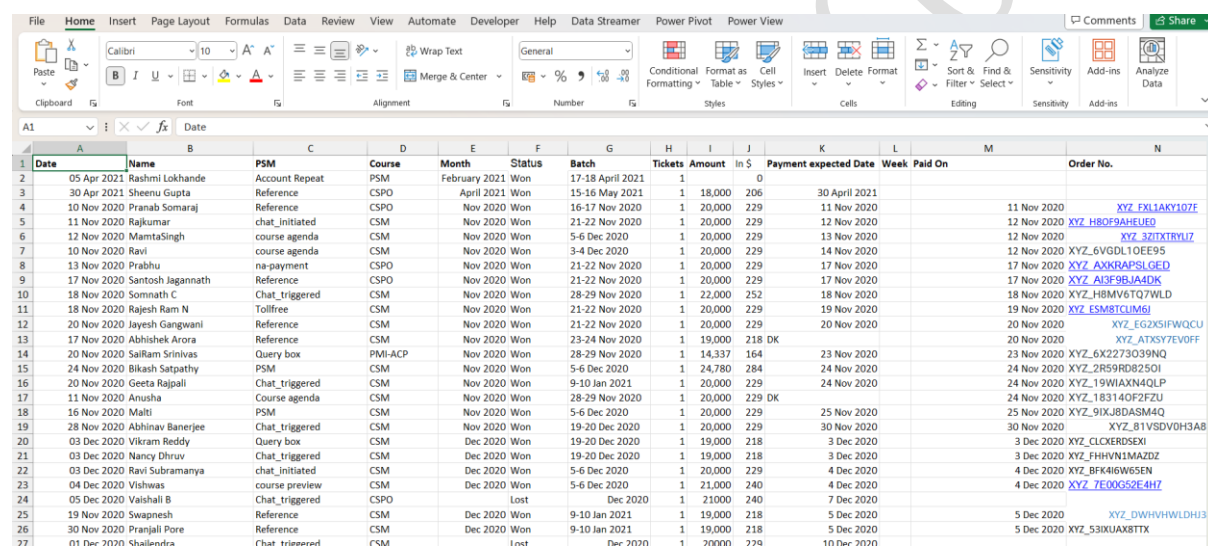
# Agile Sales Performance – Case Study

## Objective:<sup>i</sup>

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.



Date	Name	PSM	Course	Month	Status	Batch	Tickets	Amount	In \$	Payment expected Date	Week	Paid On	Order No.
05 Apr 2021	Rashmi Lokhande	Account Repeat	PSM	February 2021	Won	17-18 April 2021	1	18,000	206	30 April 2021			
30 Apr 2021	Sheenu Gupta	Reference	CSPO	April 2021	Won	15-16 May 2021	1	20,000	229	11 Nov 2020			XYZ_FXL1AKY107E
10 Nov 2020	Pranab Somaraj	Reference	CSPO	Nov 2020	Won	16-17 Nov 2020	1	20,000	229	12 Nov 2020			XYZ_H80F9AHEUEJ
11 Nov 2020	Rajkumar	chat_initiated	CSM	Nov 2020	Won	21-22 Nov 2020	1	20,000	229	12 Nov 2020			XYZ_37IXTRVUJ7
12 Nov 2020	MamtaSingh	course agenda	CSM	Nov 2020	Won	5-6 Dec 2020	1	20,000	229	12 Nov 2020			XYZ_6VGD10EE95
10 Nov 2020	Ravi	course agenda	CSM	Nov 2020	Won	3-4 Dec 2020	1	20,000	229	14 Nov 2020			XYZ_AXKRAPSLGED
13 Nov 2020	Prabhu	na-payment	CSPO	Nov 2020	Won	21-22 Nov 2020	1	20,000	229	17 Nov 2020			XYZ_AJ3F9BJA4DK
17 Nov 2020	Santosh Jagannath	Reference	CSPO	Nov 2020	Won	21-22 Nov 2020	1	20,000	229	17 Nov 2020			XYZ_H8MV6TQ7WLD
18 Nov 2020	Somnath C	Chat_triggered	CSM	Nov 2020	Won	28-29 Nov 2020	1	22,000	252	18 Nov 2020			XYZ_ESM8TCLUM6j
18 Nov 2020	Rajesh Ram N	Tollfree	CSM	Nov 2020	Won	21-22 Nov 2020	1	20,000	229	19 Nov 2020			XYZ_EGZKXIFWQCU
20 Nov 2020	Jayesh Gangwani	Reference	CSM	Nov 2020	Won	21-22 Nov 2020	1	20,000	229	20 Nov 2020			XYZ_ATKSY7EVOFF
17 Nov 2020	Abhishek Arora	Reference	CSM	Nov 2020	Won	23-24 Nov 2020	1	19,000	218 DK	23 Nov 2020			XYZ_6X2273039NQ
20 Nov 2020	Saifram Srinivas	Query box	PMI-ACP	Nov 2020	Won	28-29 Nov 2020	1	14,337	164	23 Nov 2020			XYZ_2R59RD8250I
24 Nov 2020	Bikash Satpathy	PSM	CSM	Nov 2020	Won	5-6 Dec 2020	1	24,780	284	24 Nov 2020			XYZ_19WAXN4Q1P
20 Nov 2020	Geeta Rajpali	Chat_triggered	CSM	Nov 2020	Won	9-10 Jan 2021	1	20,000	229	24 Nov 2020			XYZ_183140F2FZU
11 Nov 2020	Anusha	Course agenda	CSM	Nov 2020	Won	28-29 Nov 2020	1	20,000	229 DK	25 Nov 2020			XYZ_9IXJ8DASMA4Q
16 Nov 2020	Malti	PSM	CSM	Nov 2020	Won	5-6 Dec 2020	1	20,000	229	30 Nov 2020			XYZ_81VSDVH3A8
28 Nov 2020	Abhinav Banerjee	Chat_triggered	CSM	Nov 2020	Won	19-20 Dec 2020	1	20,000	229	3 Dec 2020			XYZ_CLCKERDSEKI
03 Dec 2020	Vikram Reddy	Query box	CSM	Dec 2020	Won	19-20 Dec 2020	1	19,000	218	3 Dec 2020			XYZ_FHHVN1MAZDZ
03 Dec 2020	Nancy Dhruv	Chat_triggered	CSM	Dec 2020	Won	19-20 Dec 2020	1	19,000	218	4 Dec 2020			XYZ_BFK46W65EN
03 Dec 2020	Ravi Subramanya	chat_initiated	CSM	Dec 2020	Won	5-6 Dec 2020	1	20,000	229	4 Dec 2020			XYZ_7E00G52E4HT
04 Dec 2020	Vishwas	course preview	CSM	Dec 2020	Won	5-6 Dec 2020	1	21,000	240	7 Dec 2020			XYZ_DWNVHVLHJ3
05 Dec 2020	Vaishali B	Chat_triggered	CSPO	Dec 2020	Lost	Dec 2020	1	21,000	240	5 Dec 2020			XYZ_530UAX8BTK
19 Nov 2020	Swagadesh	Reference	CSM	Dec 2020	Won	9-10 Jan 2021	1	19,000	218	5 Dec 2020			
30 Nov 2020	Pranali Pore	Reference	CSM	Dec 2020	Won	9-10 Jan 2021	1	19,000	218	10 Dec 2020			
01 Dec 2020	Shalendra	Chat_triggered	CSM	Dec 2020	Lost	Dec 2020	1	20,000	229				

## 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 1<sup>st</sup> 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).

	A	B	C	D	E	F
1	Date	Name	PSM	Course	Month	Status
2	05 Apr 2021	Rashmi Lokhande	Account Repeat	PSM	Feb 2021	Won
3	30 Apr 2021	Sheenu Gupta	Reference	CSPO	Apr 2021	Won
4	10 Nov 2020	Pranab Somaraj	Reference	CSPO	Nov 2020	Won
5	11 Nov 2020	Rajkumar	chat_initiated	CSM	Nov 2020	Won
6	12 Nov 2020	MamtaSingh	course agenda	CSM	Nov 2020	Won
7	10 Nov 2020	Ravi	course agenda	CSM	Nov 2020	Won
8	13 Nov 2020	Prabhu	na-payment	CSPO	Nov 2020	Won
9	17 Nov 2020	Santosh Jagannath	Reference	CSPO	Nov 2020	Won
10	18 Nov 2020	Somnath C	Chat_triggered	CSM	Nov 2020	Won
11	18 Nov 2020	Rajesh Ram N	Tollfree	CSM	Nov 2020	Won
12	20 Nov 2020	Jayesh Gangwani	Reference	CSM	Nov 2020	Won
13	17 Nov 2020	Abhishek Arora	Reference	CSM	Nov 2020	Won

File Home Insert Page Layout Formulas Data Review View Automate Developer Help Data Streamer Power Pivot Power View Table Design Comments Share													
Clipboard Font Alignment Number Styles Cells Editing Sensitivity Add-ins Analyze Data													
A1 fx Date													
	A	B	C	D	E	F	G	H	I	J	K	L	
1	Date	Name	PSM	Course	Month	Status	Batch	Amount	In \$	Payment expected Date	Week	Paid On	
2	05 Apr 2021	Rashmi Lokhande	Account Repeat	PSM	Feb 2021	Won	17-18 April 2021	₹ 0	\$0	16 Apr 2021		16 Apr	
3	30 Apr 2021	Sheenu Gupta	Reference	CSPO	Apr 2021	Won	15-16 May 2021	₹ 18,000	\$206	30 Apr 2021		30 Apr	
4	10 Nov 2020	Pranab Somaraj	Reference	CSPO	Nov 2020	Won	16-17 Nov 2020	₹ 20,000	\$229	11 Nov 2020		11 Nov	
5	11 Nov 2020	Rajkumar	chat_initiated	CSM	Nov 2020	Won	21-22 Nov 2020	₹ 20,000	\$229	12 Nov 2020		12 Nov	
6	12 Nov 2020	MamtaSingh	course agenda	CSM	Nov 2020	Won	5-6 Dec 2020	₹ 20,000	\$229	13 Nov 2020		12 Nov	
7	10 Nov 2020	Ravi	course agenda	CSM	Nov 2020	Won	3-4 Dec 2020	₹ 20,000	\$229	14 Nov 2020		12 Nov	
8	13 Nov 2020	Prabhu	na-payment	CSPO	Nov 2020	Won	21-22 Nov 2020	₹ 20,000	\$229	17 Nov 2020		17 Nov	
9	17 Nov 2020	Santosh Jagannath	Reference	CSPO	Nov 2020	Won	21-22 Nov 2020	₹ 20,000	\$229	17 Nov 2020		17 Nov	
10	18 Nov 2020	Somnath C	Chat_triggered	CSM	Nov 2020	Won	28-29 Nov 2020	₹ 22,000	\$252	18 Nov 2020		18 Nov	
11	18 Nov 2020	Rajesh Ram N	Tollfree	CSM	Nov 2020	Won	21-22 Nov 2020	₹ 20,000	\$229	19 Nov 2020		19 Nov	
12	20 Nov 2020	Jayesh Gangwani	Reference	CSM	Nov 2020	Won	21-22 Nov 2020	₹ 20,000	\$229	20 Nov 2020		20 Nov	
13	17 Nov 2020	Abhishek Arora	Reference	CSM	Nov 2020	Won	23-24 Nov 2020	₹ 19,000	\$218 DK			20 Nov	
14	20 Nov 2020	Saifram Srinivas	Query box	PMI-ACP	Nov 2020	Won	28-29 Nov 2020	₹ 14,337	\$164	23 Nov 2020		23 Nov	
15	24 Nov 2020	Bikash Satpathy	PSM	CSM	Nov 2020	Won	5-6 Dec 2020	₹ 24,780	\$284	24 Nov 2020		24 Nov	
16	20 Nov 2020	Geeta Rajpali	Chat_triggered	CSM	Nov 2020	Won	9-10 Jan 2021	₹ 20,000	\$229	24 Nov 2020		24 Nov	
17	11 Nov 2020	Anusha	Course agenda	CSM	Nov 2020	Won	28-29 Nov 2020	₹ 20,000	\$229 DK			24 Nov	
18	16 Nov 2020	Malti	PSM	CSM	Nov 2020	Won	5-6 Dec 2020	₹ 20,000	\$229	25 Nov 2020		25 Nov	
19	28 Nov 2020	Abhinav Banerjee	Chat_triggered	CSM	Nov 2020	Won	19-20 Dec 2020	₹ 20,000	\$229	30 Nov 2020		30 Nov	
20	03 Dec 2020	Vikram Reddy	Query box	CSM	Dec 2020	Won	19-20 Dec 2020	₹ 19,000	\$218	03 Dec 2020		03 Dec	
21	03 Dec 2020	Nancy Dhruv	Chat_triggered	CSM	Dec 2020	Won	19-20 Dec 2020	₹ 19,000	\$218	03 Dec 2020		03 Dec	
22	03 Dec 2020	Ravi Subramanya	chat_initiated	CSM	Dec 2020	Won	5-6 Dec 2020	₹ 20,000	\$229	04 Dec 2020		04 Dec	
23	04 Dec 2020	Vishwas	course preview	CSM	Dec 2020	Won	5-6 Dec 2020	₹ 21,000	\$240	04 Dec 2020		04 Dec	
24	19 Nov 2020	Swapnesh	Reference	CSM	Dec 2020	Won	9-10 Jan 2021	₹ 19,000	\$218	05 Dec 2020		05 Dec	
25	30 Nov 2020	Pranjali Pore	Reference	CSM	Dec 2020	Won	9-10 Jan 2021	₹ 19,000	\$218	05 Dec 2020		05 Dec	

## Analysis of the data:

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

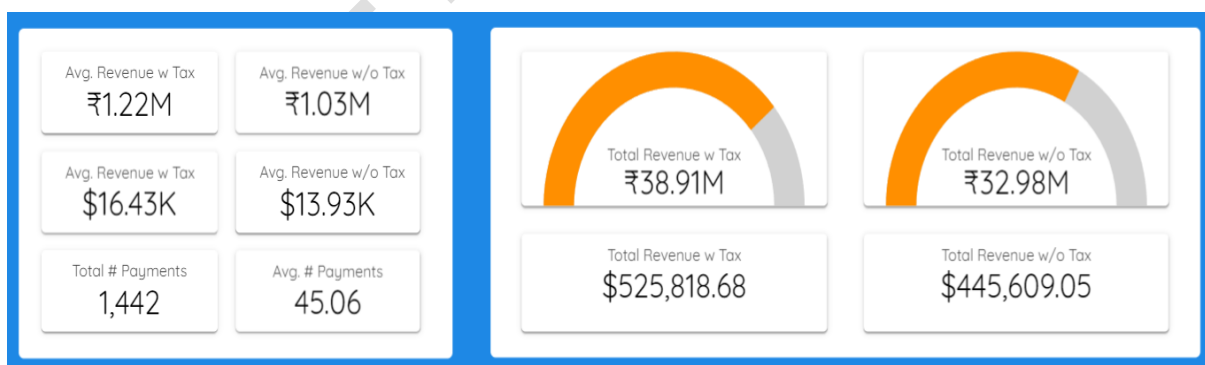
Created Agile Sales Performance dashboard in the Excel Workbook project, Google sheets project as well as in the Looker Studio – Data studio. Here, below the Screenshots are from the Looker Studio (Data Studio) report.

Access the Looker Studio Dashboard here –

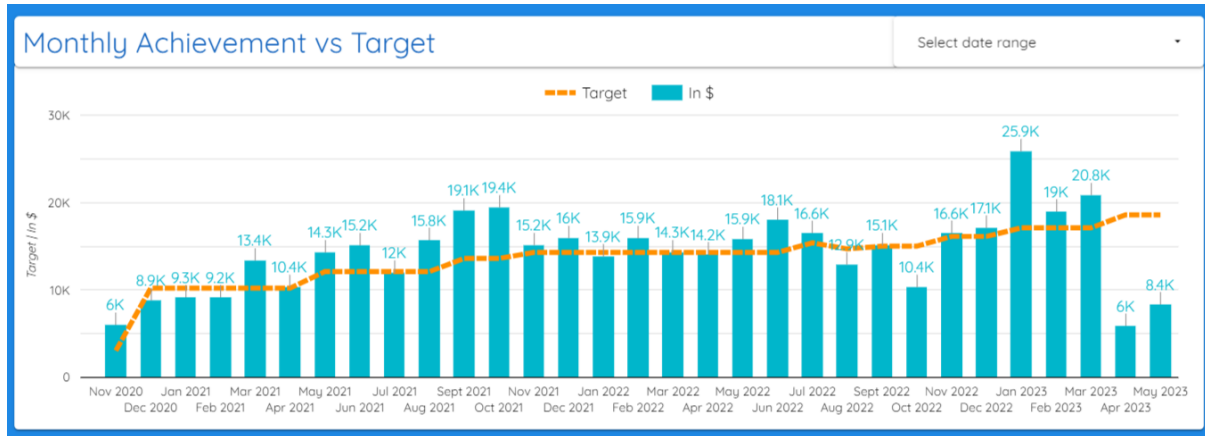
<https://lookerstudio.google.com/reporting/ae67f891-9295-4d99-a289-5e61c5f88c35>

## Report Findings:

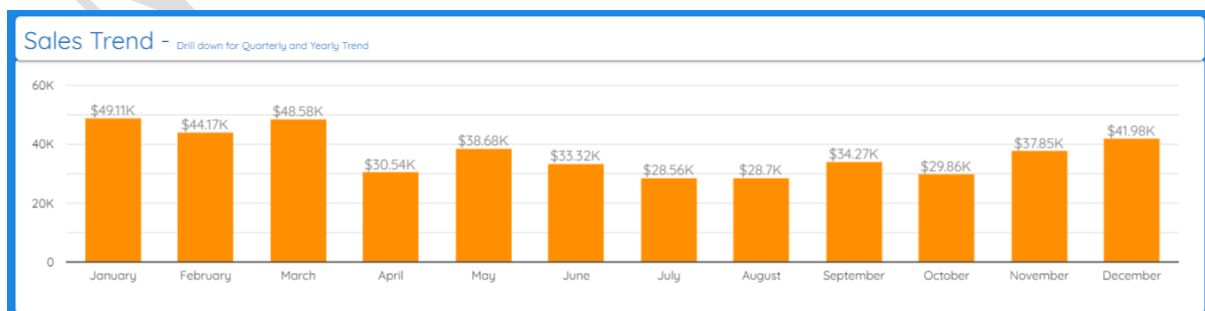
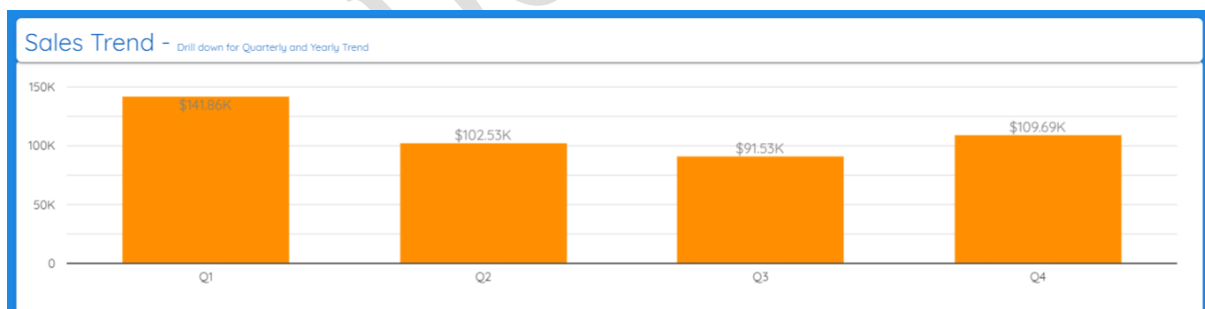
- Consistent Revenue generation – on an Avg. \$16.43 with tax and Avg. \$13.93 without taxes month on month.



- Consistency of 75% hitting the given target month on month despite increase in targets abruptly between months.

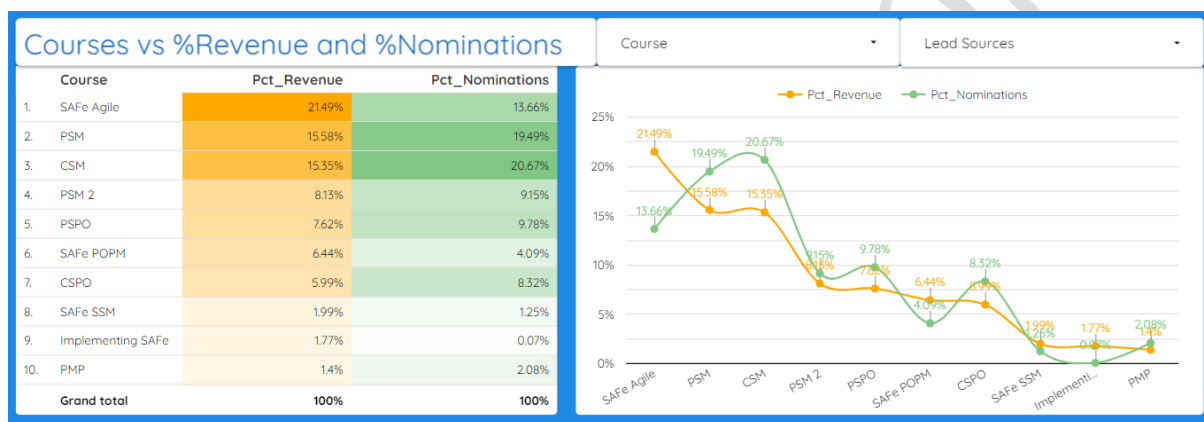


- From the sales trend it is seen that the highest sales for the year comes in JFM – Q1 \$141,862 (Q4 for the end of financial year) by 1.5X higher compared to other quarters. The reason can be narrowed down to the company approvals for the certifications, as the financial year closes lot of learners 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).



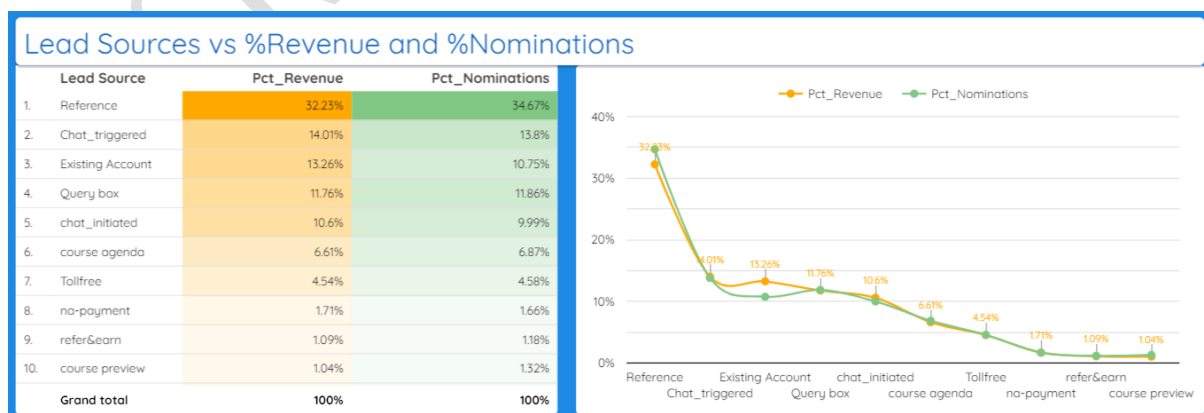
- With respect to courses – revenue and # of tickets contribution mainly comes from the following courses,
  - SAFe Agile – 21.5% revenue
  - PSM – 15.58% revenue
  - CSM – 15.35% revenue
  - PSM 2 – 8.13% revenue
  - PSPO – 7.62% revenue

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.



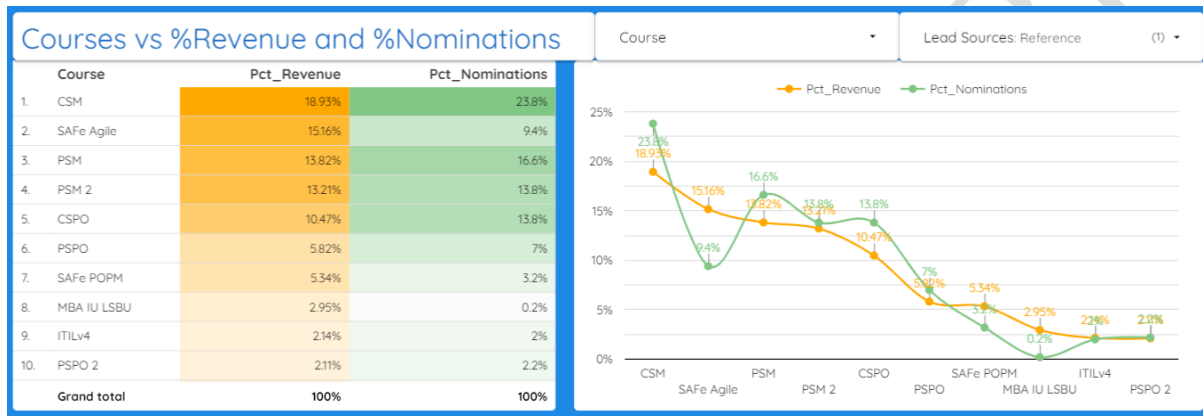
- Similarly, w.r.t the Lead Sources, References take the top spot with the contribution of 32.23% of revenue towards the overall revenue generated, followed by Chat\_triggered – 14.01%, Existing Account – 13.26%, Query box – 11.76%, and chat\_initiated – 10.6% contribution towards the revenue.

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.



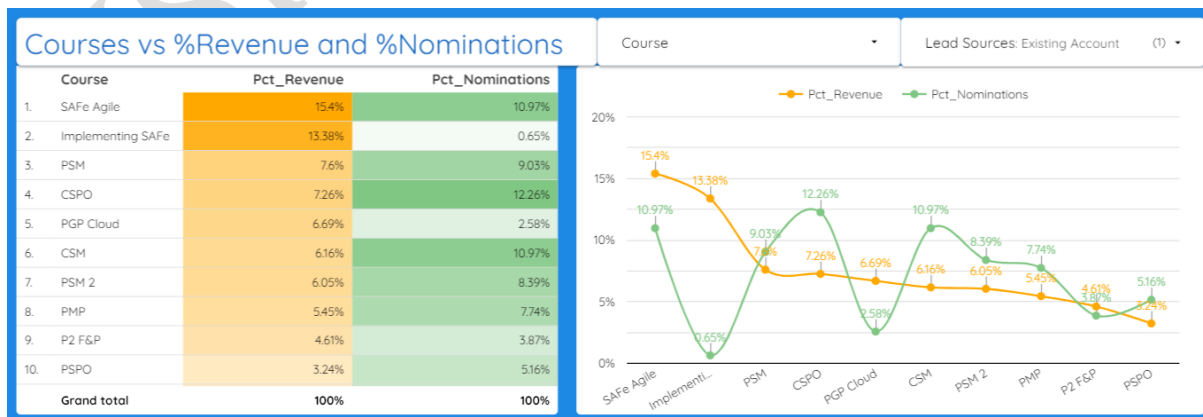
- On further deep dive of References, it is seen that highest reference from the existing learners is given for the following top 5 courses,
  - CSM – 18.93% revenue
  - SAFe Agile – 15.16% revenue
  - PSM – 13.82% revenue
  - PSM 2 – 13.21% revenue
  - CSPO - 10.47% revenue

% 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.



- 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.



#### 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/1C86-6IYvNIJ7rYoAK7z9Q-e5933DzW1i\\_c50vPGn9Z8/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1C86-6IYvNIJ7rYoAK7z9Q-e5933DzW1i_c50vPGn9Z8/edit?usp=sharing)

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