



TCC Security Systems

Executive Sales & Budget Dashboard

Excel BI project delivering comprehensive visibility into sales pipeline, security budgets, product mix, urgency levels, and regional performance across global financial institutions.

Business Context & Strategic Goal

The Challenge

Financial institutions allocate substantial capital—often millions annually—to physical and digital security infrastructure across their branch networks and vault facilities. Security spending represents a critical operational priority, yet visibility into budget allocation, deal readiness, and market demand remains fragmented.

Sales teams struggle to effectively align client security budgets with realistic revenue opportunities, often missing high-value deals while pursuing under-funded prospects. Without centralized intelligence, prioritizing urgent, high-impact accounts becomes guesswork rather than strategy.

Our Solution

This project delivers a unified executive dashboard that transforms scattered data into actionable intelligence. By consolidating multi-bank, multi-country security opportunities into a single view, leadership gains real-time insight into opportunity size, budget readiness, and product demand patterns.

The result: sales teams can confidently prioritize accounts with the highest probability of conversion, align solution packaging to demonstrated demand, and accelerate deal velocity in budget-ready markets.

Project Scope & Coverage



Geographic Reach

Multi-country security opportunity tracking across 22 nations, enabling regional performance comparison and market penetration analysis.

Analytical Dimensions

Comprehensive coverage of pipeline value, allocated security budgets, urgency classifications, product category demand, and sales stage progression.

Executive Focus

Purpose-built for C-suite reporting and strategic sales prioritization, delivering clarity on where to focus resources for maximum return.

Key Metrics Snapshot

These foundational metrics provide executive leadership with immediate context on opportunity scale, market coverage, and budget capacity across the global security portfolio.

\$4M

Total Potential Deal Size

Aggregate pipeline value across all active opportunities

\$14M

Total Security Budget

Combined allocated security spend from client institutions

\$499K

Average Security Budget

Mean budget per financial institution client

6K

Bank Branches Covered

Total branch locations within client portfolio

13

Total Banks

Financial institution clients tracked in pipeline

22

Countries

Geographic markets with active security opportunities

The 3.5x budget-to-deal ratio (\$14M budget vs. \$4M pipeline) signals substantial headroom for strategic upsell, solution bundling, and expanded deployment across existing client relationships.

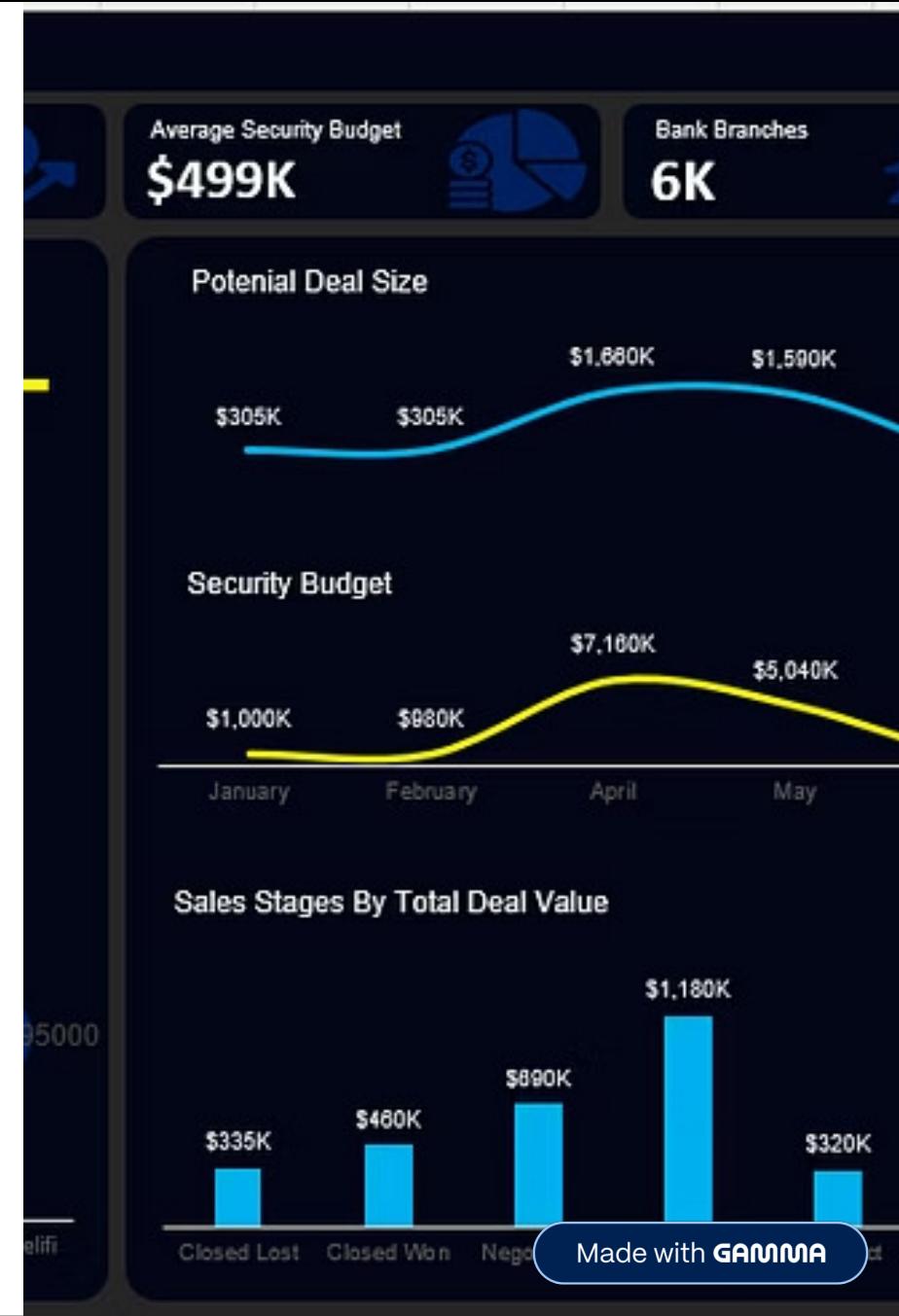
Dashboard Overview

Interactive Controls

- Dynamic month filtering for temporal analysis
- Urgency level segmentation (High/Medium/Low)
- Real-time metric recalculation
- Drill-down capability by dimension

Design Philosophy

The dashboard consolidates complex multi-dimensional data into an intuitive executive interface. Each visualization is optimized for rapid decision-making, enabling leadership to identify priorities, spot trends, and allocate resources with confidence during monthly business reviews.



Analytical Views & Capabilities

01

Deal vs Budget Analysis (by Bank)

Side-by-side comparison of opportunity size against client budget capacity, revealing which institutions have funding available for immediate expansion and which may require phased approaches or budget cycle alignment.

03

Product Type Distribution

Granular breakdown of demand across Access Control Systems, Safe Deposit Boxes, and Vault Doors, enabling product teams to align inventory, pricing, and solution packaging to actual market demand signals.

05

Sales Stage Value Distribution

Pipeline segmentation showing where the largest dollar values concentrate across stages (Lead, Qualified, Proposal, Negotiation), pinpointing conversion bottlenecks and forecasting reliability by stage maturity.

02

Monthly Trend Tracking

Longitudinal view of potential deal size and security budget evolution over time, identifying seasonal patterns, budget refresh cycles, and momentum shifts that inform timing strategies.

04

Urgency Level by Client

Heat map highlighting high-priority accounts requiring rapid engagement, allowing sales leadership to deploy senior resources strategically and accelerate response times where competitive advantage matters most.

06

Country Performance Summary

Geographic performance ranking identifying top markets for focused expansion, partnership development, and resource allocation, with metrics on both opportunity size and budget readiness by region.

Key Strategic Insights

Significant Budget Headroom

With \$14M in total security budgets against only \$4M in current pipeline, there is substantial capacity for upsell opportunities, solution bundling, and comprehensive rollouts across existing client branch networks. This 3.5x ratio suggests we are under-penetrating budget-ready accounts.

Late-Stage Pipeline Concentration

Meaningful value resides in Proposal and Qualified stages, indicating strong near-term conversion potential. Prioritizing deal acceleration in these advanced stages—through streamlined approvals and negotiation playbooks—can deliver faster revenue realization than solely focusing on early-stage lead generation.

Balanced Product Demand

Opportunity distribution across Access Control Systems, Safe Deposit Boxes, and Vault Doors is relatively balanced, validating a comprehensive solution strategy rather than single-product specialization. This supports bundled offerings and integrated security proposals.

Geographic Performance Clarity

Country-level analysis surfaces clear market leaders where both budget capacity and deal size align, enabling data-driven decisions on where to concentrate marketing investments, establish strategic partnerships, and deploy senior sales leadership for maximum impact.

Urgency as Competitive Edge

Urgency segmentation reveals that speed-to-response correlates with deal probability. High-urgency accounts likely face compliance deadlines, security incidents, or audit findings—creating windows for premium pricing and accelerated deployment if we can respond faster than competitors.

Strategic Recommendations

These data-driven recommendations translate dashboard insights into actionable sales and business strategies designed to accelerate conversion, expand wallet share, and optimize resource allocation.



Adopt Urgency-Based Prioritization



High urgency + high budget: Assign senior relationship executives with expedited approval pathways and executive sponsorship to capture time-sensitive, high-value opportunities.

High urgency + lower budget: Offer phased implementation plans with modular deployment to address immediate needs while preserving future expansion potential.



Target Budget-Ready Upsell



Leverage the budget-to-deal gap analysis to systematically identify financial institutions with substantial allocated budgets but under-sized current opportunities. Develop branch-wide security assessments and propose comprehensive bundled solutions that fully utilize available funding.



Strengthen Late-Stage Conversion



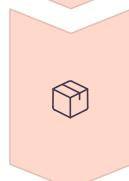
Standardize negotiation playbooks and create tiered solution packages specifically for Proposal and Qualified stage accounts. Reduce decision friction through pre-approved financing terms, expedited legal review, and reference customer introductions that accelerate deal closure.



Focus Expansion on Top Countries First



Concentrate marketing budgets, partnership development, and senior sales leadership deployment in countries demonstrating both strong security budgets and substantial deal sizes. Achieve market leadership in priority geographies before broader expansion.



Align Product Packaging to Demand Mix



Create standardized solution bundles reflecting observed product demand patterns: **Standard Branch Package** (access control basics), **Advanced Branch Package** (access control + safe deposit boxes), and **Premium Full-Suite** (comprehensive vault security). Simplify buying decisions and improve quote-to-close velocity.

Tools & Technical Skills Demonstrated



- **Microsoft Excel**

Advanced formulas, pivot tables, dynamic arrays, and data modeling for scalable business intelligence without requiring expensive BI platform licenses.

- **Executive Dashboard Design**

User experience optimization for C-suite audiences, balancing comprehensive data with visual clarity and intuitive navigation patterns.

- **KPI Reporting & Metric Definition**

Identification and calculation of business-critical metrics aligned to strategic objectives, ensuring dashboard drives decision-making rather than just displaying data.

- **Data Visualization & Storytelling**

Translation of complex multi-dimensional datasets into clear visual narratives that reveal insights, highlight priorities, and support evidence-based strategy.

- **Trend & Pipeline Analysis**

Temporal pattern recognition, sales funnel dynamics, and predictive indicators that inform forecasting accuracy and resource planning.

- **Business-Oriented Recommendations**

Synthesis of analytical findings into specific, actionable strategies with clear implementation pathways and measurable success criteria.

Business Impact & Value Delivered

Enhanced Sales Precision

Eliminates guesswork by revealing exactly where budgets and opportunities align, enabling sales teams to focus efforts on high-probability accounts rather than pursuing under-funded prospects that drain resources without converting.

Improved Forecast Accuracy

Stage-level value visibility provides leadership with reliable pipeline metrics for quarterly planning, investor communications, and operational resource allocation, reducing surprise shortfalls and enabling proactive capacity management.

Data-Driven Geographic Strategy

Country performance signals support evidence-based expansion decisions, ensuring marketing investments, partnership development, and sales territory planning concentrate resources in markets demonstrating proven budget capacity and deal potential.

Repeatable Executive Cadence

Provides leadership with a standardized, monthly review artifact that maintains strategic focus, tracks performance against goals, and facilitates consistent cross-functional alignment between sales, product, and finance teams.

This dashboard transforms security sales from reactive opportunity pursuit into proactive, intelligence-driven strategy—accelerating revenue growth while optimizing resource deployment across the global portfolio.