### **Case Study: Driving Growth at Drilldown solutions**

Welcome to the next stage of our interview process. This case study is designed to simulate a real-world project you would encounter at our agency. It will test your ability to work with complex, relational data, derive meaningful business insights, and present your findings in a clear and compelling way.

We've provided a custom dataset for this exercise. Your goal is to deliver actionable recommendations backed by solid data analysis.

### **The Scenario: Setting the Stage**

Our client is Drilldown Solutions, a rapidly growing B2B software company based in the Netherlands. They sell a suite of products, including CRM licenses, data analytics software, and related support and consulting services, to a diverse range of industries across Europe and the USA.

For the past few years, Drilldown Solutions has focused heavily on growth and product development. They have successfully acquired many new customers but have done so with a "one-size-fits-all" sales and marketing strategy. Their data is split between their CRM (like HubSpot) and their billing system (like Exact Online), and they have never integrated the two to get a complete picture of their business.

#### **The Business Challenge:**

The leadership team at Drilldown Solutions feels they're "flying blind." They know they are making money, but they don't truly understand who their best customers are, which products are most profitable, or how effective their sales team is. They have hired us to connect their data and answer a critical question:

**"Where should we focus our sales and marketing efforts to achieve more profitable and sustainable growth?"**

Your mission is to act as the lead analyst on this project. You must dive into their integrated data, uncover the story it tells, and present a strategic plan to the Drilldown Solutions leadership team.

### **The Dataset:**

You've been provided with a custom dataset that merges Drilldown Solutions's CRM and accounting data into six interconnected CSV files. Understanding the relationships between these files is key to a successful analysis.

* **CRM Data (Sales & Marketing):**
  + companies.csv: Information on the 100 client companies, including their industry, size, and location.
  + contacts.csv: The individual people you have relationships with at those companies.
  + deals.csv: The sales pipeline. This is crucial as it tracks every opportunity, whether it was **won, lost, or is still in progress**. The deal\_stage column is your source of truth for sales outcomes.
* **Accounting Data (Finance & Products):**
  + products.csv: The catalog of products and services Drilldown Solutions sells, along with their standard unit price.
  + invoices.csv: The financial record of every invoice sent to a customer for a **"Closed Won"** deal. It tracks the total amount, due dates, and payment status (Paid, Sent, Overdue).
  + invoice\_lines.csv: The specific line items on each invoice. This file lets you see exactly **which products and in what quantity** were sold in each transaction.

**Key Relationships:** A **Company** has **Contacts** and **Deals**. A "Closed Won" **Deal** generates an **Invoice**. An **Invoice** is made up of **Invoice Lines**, and each line corresponds to a **Product**.

### **Key Questions & Suggested Insights to Explore**

Your analysis should be guided by the client's core challenge. Don't just report numbers; interpret what they mean for the business. Here are some suggestions to get you started:

**1. Analyze Sales Performance & Efficiency**

**Example given**

* **Who are the top sales performers?**
* **What is the overall sales conversion rate?**

**2. Uncover High-Value Customer Segments**

* **Who are our most valuable customers?**
* **Are there patterns in our best customers**

**3. Evaluate Product & Service Performance**

* **What are our best-selling products?**
* **Are certain products sold together frequently?**

**4. Assess Financial Health**

* **How is our cash flow?**
* **What is the average time to pay?**

Your final presentation should craft a cohesive story, highlighting Drilldown Solutions's strengths, weaknesses, and key opportunities. This narrative should culminate in clear, data-driven strategic recommendations. The essence of this case study is to effectively tell a story using the provided data, and it is not mandatory to incorporate all data if it doesn't align with your narrative.