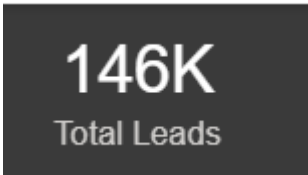Name - Rahul Sehrawat (Data Analyst)

Leveraged 3.8 years of data experience to resolve CRM-driven record mismatches by consolidating 12 disparate data sheets into a split-pipeline Power BI architecture to ensure 100% data integrity.

How I performed ETL on these two excel sheets.

- **Data Consolidation:** Appended and joined 12 individual Excel sheets into unified Master Leads and Master Sales tables Using Power Query.
- **ETL Cleaning:** Executed Power Query Trim functions to remove invisible trailing spaces and resolve Record ID relationship breaks.
- **Value Standardization:** Performed "Replace Value" operations to fix inconsistent strings such as "US$" and "USD" within the Income Band column.
- **Schema Optimization:** Audited and corrected all Data Types to ensure numerical accuracy and proper date recognition for time-series analysis.
- **Date Standardization:** Converted irregular date strings into a continuous DD-MM-YYYY format to enable accurate month-over-month trend comparisons.
- **Error Handling:** Implemented Advanced Filtering to remove "Blank" and "Error" records in critical fields like CRS Score and Sales Dates.
- **DAX Engineering:** Developed custom measures including Conversion Rate, Top Manager Share, and High-Value Client % for advanced business insights.

Dashboard Guide: Immigration Sales & Pipeline

1. Core KPI Ribbon (Strategic Indicators)

- **Total Leads (146K):** Shows the total volume of potential interest generated by marketing efforts.

- **Total Sales (1,652):** Represents the number of successfully converted candidates who have paid or signed for services

- **Conversion Rate (1.13%):** Measures the efficiency of the sales funnel by dividing total sales by total leads.

- **Applications MTD (13):** Tracks real-time performance for the current month to ensure the team is on pace for targets

- **Pending Leads(145k):** leads which are not converted into sales

- **Top Manager Share:** Identifies business risk or excellence by showing the percentage of total sales handled by the leading account manager
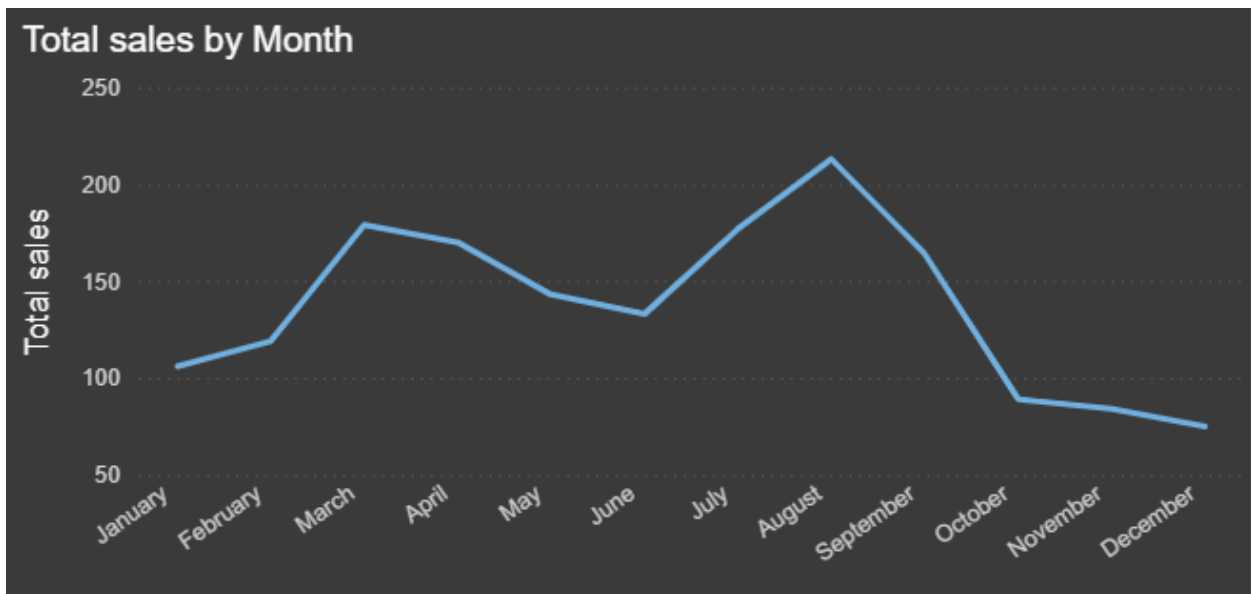
- **Account Manager :** It enables a "Deep-Dive" into individual performance, helping management identify who is successfully converting high-income leads versus who is struggling
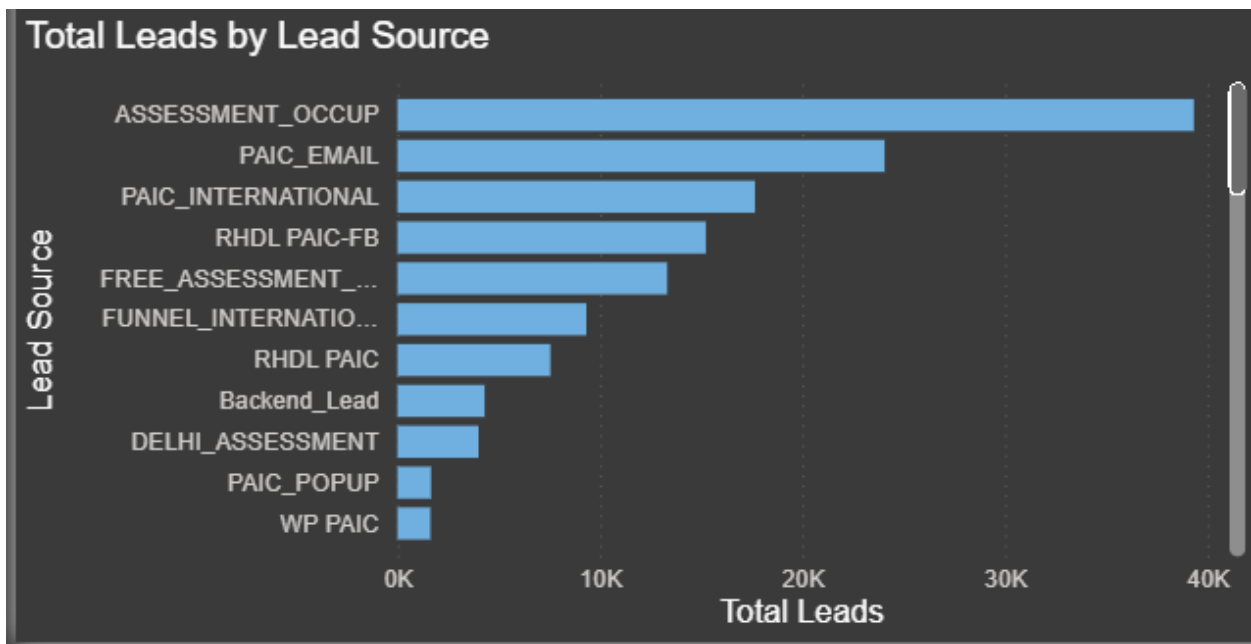
2. Trend & Demographic Analysis
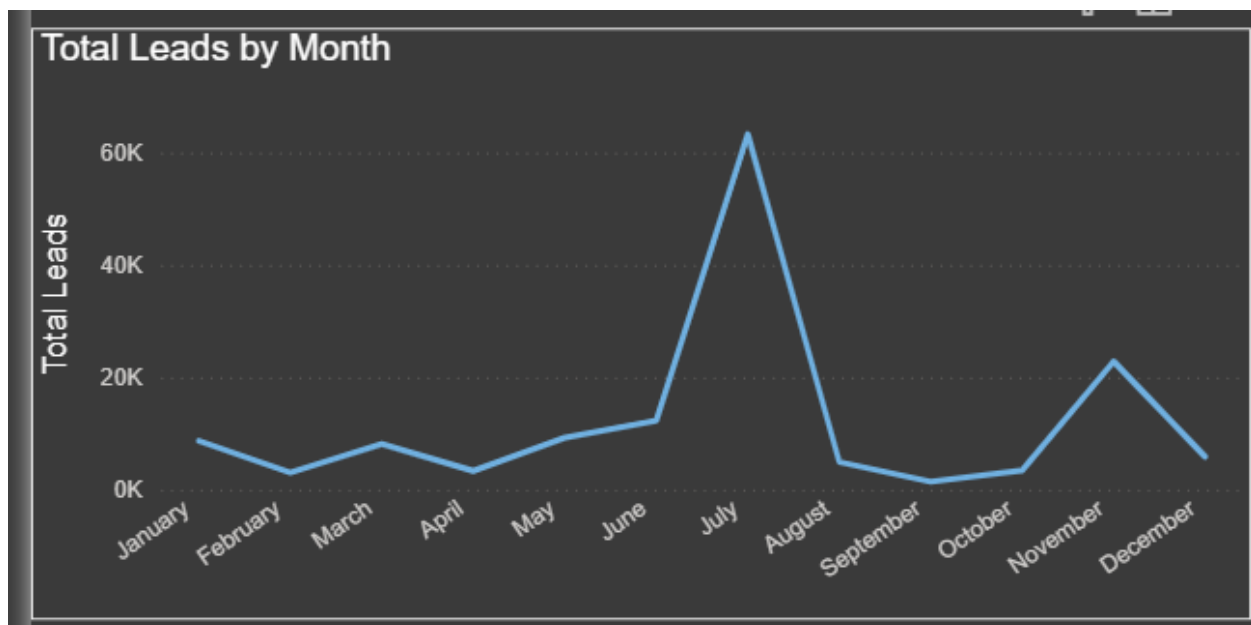
- **Total Leads by Month:** Visualizes the peaks and valleys of marketing traffic to identify the best times for ad spending
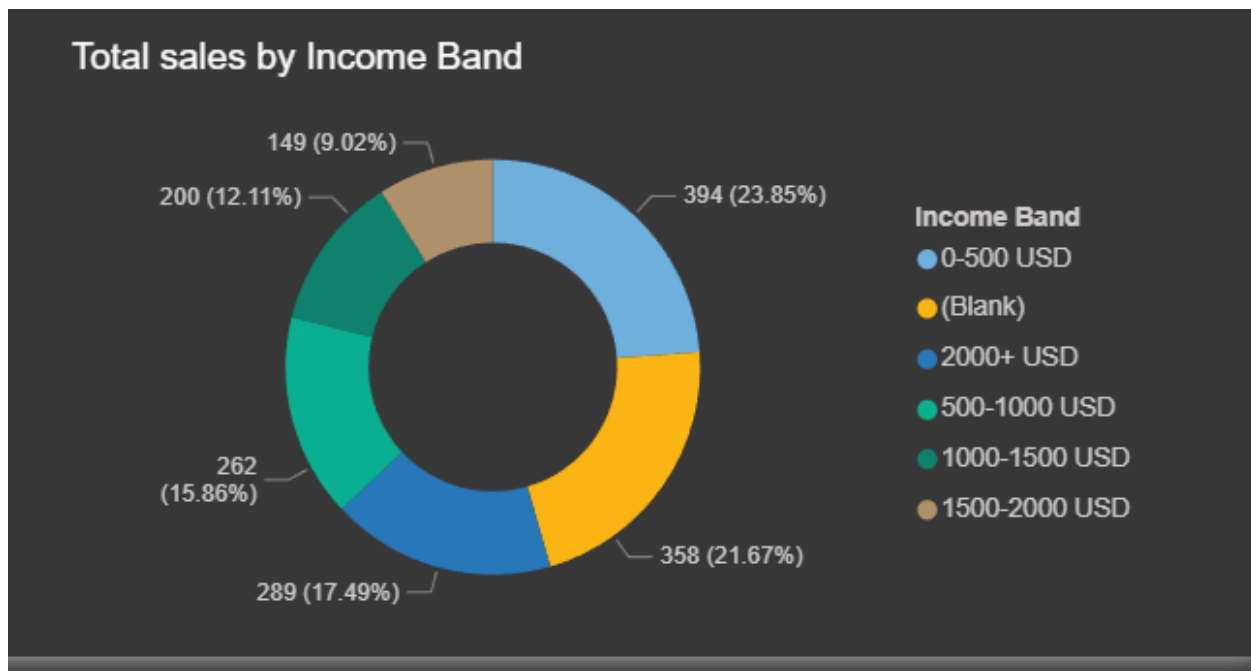
- **Total Sales by Month:** Correlates with the Lead trend to see if increased traffic is actually resulting in more closed deals

- **Total Leads by Lead Source:** Ranks platforms like Facebook or Google to prove which marketing channels provide the highest volume.

Total sales by Income Band: Segments successful buyers by wealth, proving that the sales team is attracting high-value, qualified candidates

Here are the key business insights for the firm:

- **Conversion Lag:** A clear 30-day lag exists between marketing and operations, as the massive lead spike in July resulted in the primary sales peak in August.
- **Backlog Opportunity:** There is significant untapped revenue potential within the **145K Pending Leads** currently sitting in the sales pipeline.
- **High-Value Strength:** The **"2000+ USD"** income bracket represents a strong **21.67%** of total sales, proving the business successfully attracts and converts premium, high-paying clients.
- **Low Operational Risk:** A **"Top Manager Share"** of only **0.05** indicates that sales performance is healthy and balanced across the entire team rather than being over-dependent on a single employee.