

CRM Sales Dashboard

Power BI Project

Project Background

The project assumes the role of a Power BI developer for a company selling computer hardware to large businesses. The company has been using a new CRM system and aims to develop an interactive dashboard that sales managers can use to track the team's quarterly performance and sales opportunities.

Objective

The main objective is to create an interactive dashboard that sales managers can use to answer the following questions:

- How is the sales performance of the team for the given quarter?
- How is the team performing relative to the company average?

About The Dataset

The dataset contains four tables:

- ``accounts`` - Account details of clients including company name, industry, year established, number of employees, annual revenue, location, and parent company.
- ``products`` - Details of products offered including product name, series, and sale price.
- ``sales_pipeline`` - Records of sales opportunities with details including sales agent, product name, company name, sales pipeline stage, date of first engagement, date of closing a deal, and revenue.
- ``sales_teams`` - Details of each sales agent including name, name of manager, and regional office.

Accounts and Products

The products table contains 3 product series with a combined total of 7 products. The accounts table contains 85 distinct accounts. Relevant columns for both tables have no missing or anomalous values.

Sales Teams

There are 3 regional offices in the table:

- Central has 2 managers and total of 11 sales agents.
- East has 2 managers and 12 sales agents.
- West has 2 managers and 12 sales agents.

There are 5 sales agents that were not on the sales pipeline table. As there is no additional data to explain this discrepancy, an assumption is made that these sales agents are newly recruited and have not started prospecting opportunities.

While the dataset contains several missing values, these are expected and should be left as is. The cleaned tables are of adequate quality and ready for data exploration.

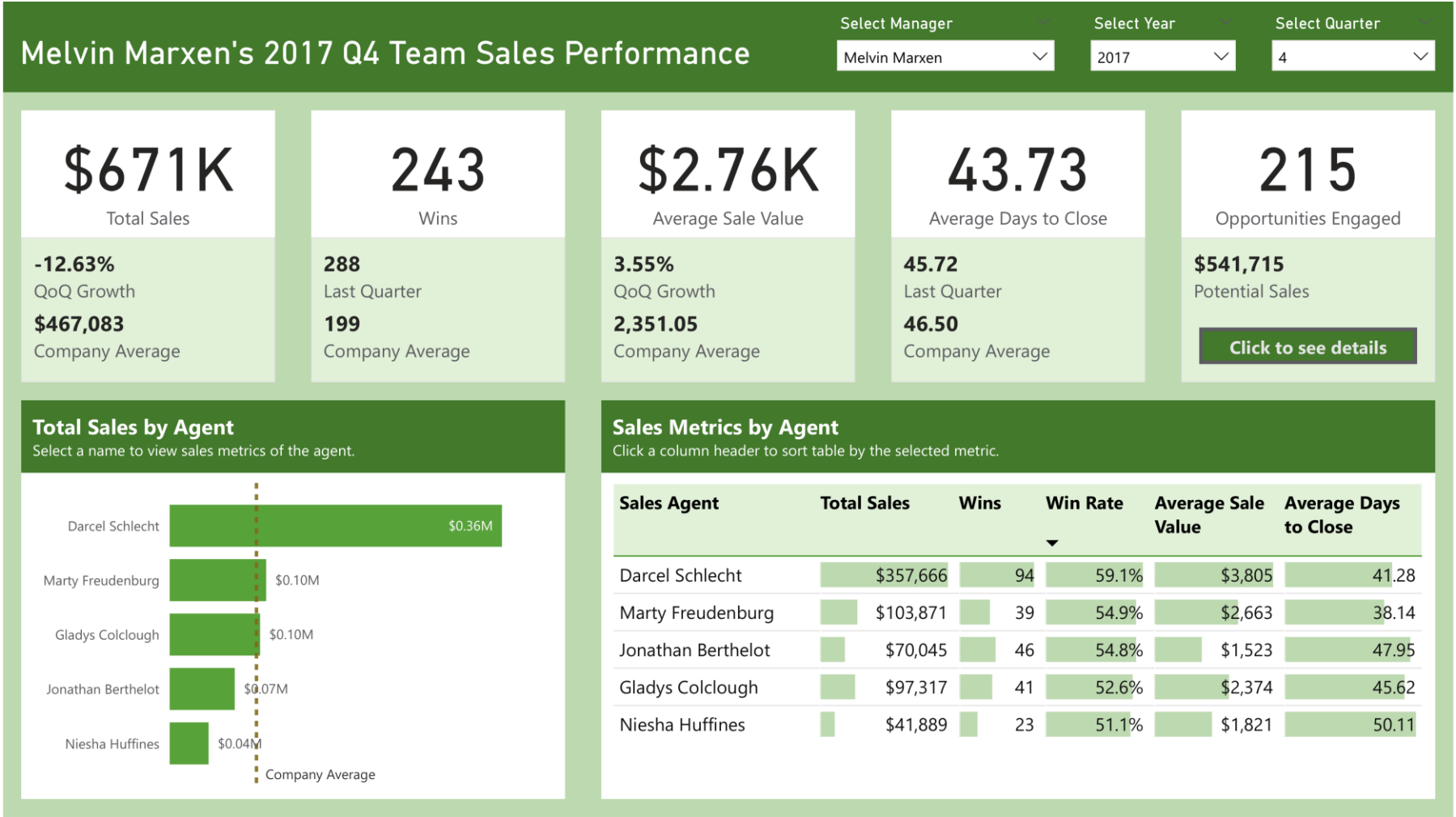
The following measures were created to calculate key performance indicators (KPIs) for use in the dashboard:

- Total sales, quarter-on-quarter (QoQ) sales growth, company average
- Wins, wins last quarter, company average.
- Win rate, win rate last quarter, company average.
- Average sale value, QoQ growth, company average
- Average days to close, last quarter, company average
- Number of opportunities engaged.
- Potential sales from engaged opportunities

Power BI Dashboard Building

The dashboard was built according to the dashboard plan mentioned above. Slicers for manager name, year, and quarter were added to filter the data and were also synchronized across pages.

The Dashboard page displays quarterly KPIs for the team. Clicking on a sales agent's name filters the data to show KPIs specific to the selected sales agent. Clicking column headers in the table sorts the rows by the selected metric. Lastly, clicking on the "Click to see details" button navigates to the Sales Opportunities page.



The Sales Opportunities page contains details of engaged opportunities with their respective potential sale value. A slicer was created to filter the table by a sales agent.

Melvin Marxen's Engaed Sales Opportunities

Select Manager

Melvin Marxen

Select Year

2017

Select Quarter

4

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Select Sales Agent

Deselect all

Darcel Schlecht

Gladys Colclough

Jonathan Berthelot

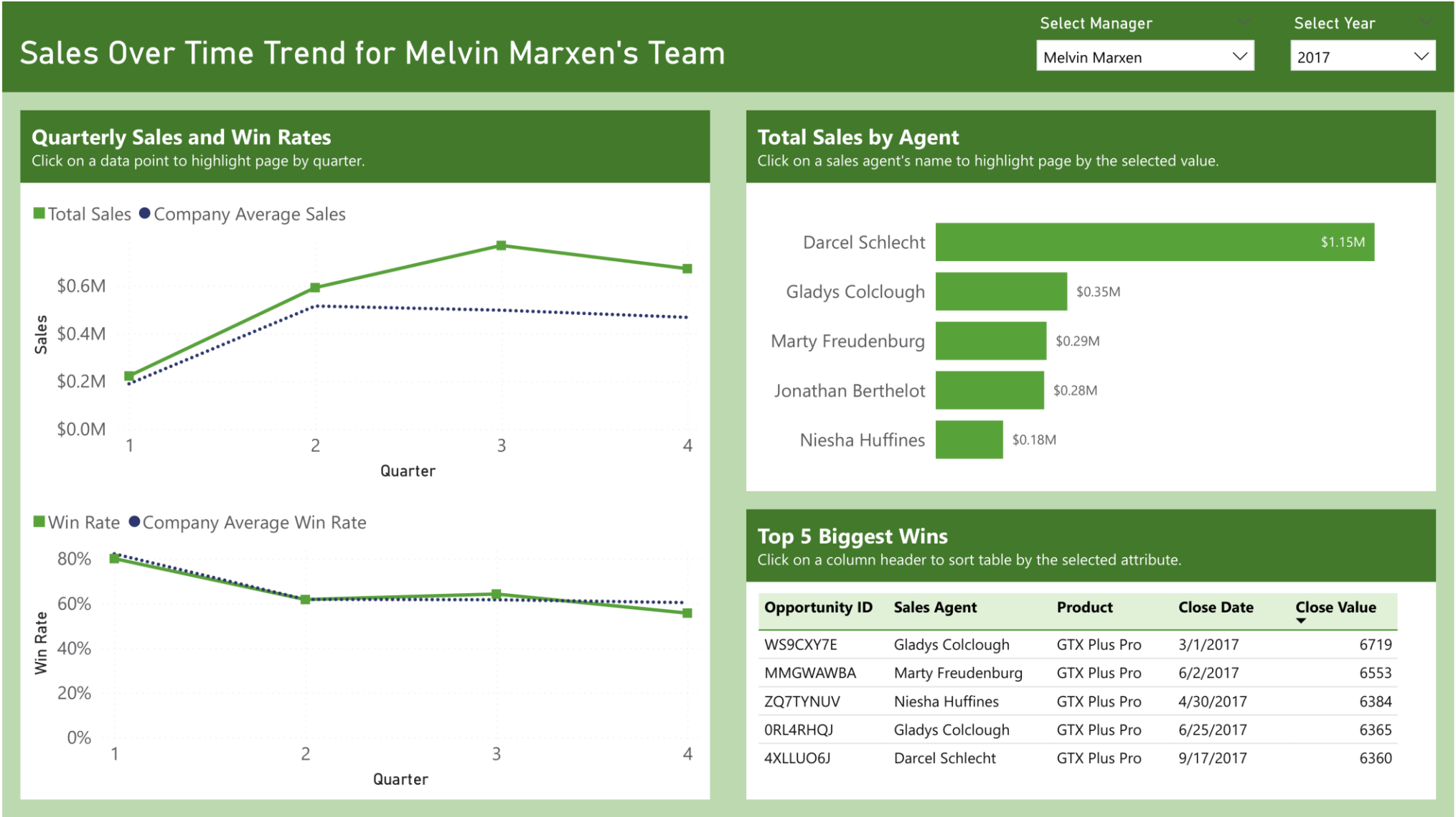
Marty Freudenburg

Mei-Mei Johns

Niesha Huffines

Opportunity ID	Sales Agent	Product	Account	Deal Stage	Engage Date	Potential Sale Value
DO6VKC2G	Marty Freudenburg	GTK 500		Engaging	8/1/2017	26768
5MAXF8FK	Gladys Colclough	GTX Plus Pro	The New York Inquirer	Engaging	8/11/2017	5482
5NGPM4C3	Darcel Schlecht	GTX Plus Pro		Engaging	8/5/2017	5482
7TFHGN6O	Darcel Schlecht	GTX Plus Pro	Inity	Engaging	7/26/2017	5482
AD2YEH7W	Marty Freudenburg	GTX Plus Pro		Engaging	8/6/2017	5482
BBOWBQA6	Niesha Huffines	GTX Plus Pro	Blackzim	Engaging	7/20/2017	5482
CBQRKYZP	Marty Freudenburg	GTX Plus Pro	Silis	Engaging	7/21/2017	5482
E3XLWCWX	Marty Freudenburg	GTX Plus Pro	Ontomedia	Engaging	7/19/2017	5482
FSNL204U	Marty Freudenburg	GTX Plus Pro	Hatfan	Engaging	8/9/2017	5482
G7RZTAMV	Gladys Colclough	GTX Plus Pro		Engaging	7/27/2017	5482
I3KQNE9V	Darcel Schlecht	GTX Plus Pro	Isdom	Engaging	7/19/2017	5482
J31SUXQJ	Marty Freudenburg	GTX Plus Pro	Sumace	Engaging	8/10/2017	5482
MBYOJR5A	Marty Freudenburg	GTX Plus Pro		Engaging	8/1/2017	5482
R55U5QI4	Darcel Schlecht	GTX Plus Pro	Scottech	Engaging	7/30/2017	5482
RCJRB8W8	Darcel Schlecht	GTX Plus Pro		Engaging	8/5/2017	5482
RTWAUR7C	Gladys Colclough	GTX Plus Pro	Y-corporation	Engaging	7/24/2017	5482
RV5Y8DRY	Marty Freudenburg	GTX Plus Pro		Engaging	7/25/2017	5482
Z4OOTJAJ	Darcel Schlecht	GTX Plus Pro		Engaging	8/10/2017	5482
0TC6I9SJ	Darcel Schlecht	GTX Pro	Dontechi	Engaging	7/24/2017	4821
0XBGT413	Gladys Colclough	GTX Pro		Engaging	7/30/2017	4821
1QKDD1OI	Darcel Schlecht	GTX Pro	Isdom	Engaging	7/25/2017	4821
2E2FDZHG	Niesha Huffines	GTX Pro		Engaging	8/2/2017	4821
33FL3715	Darcel Schlecht	GTX Pro		Engaging	7/25/2017	4821

The Sales Over Time page displays sales and win rates by quarter. Clicking a data point highlights the page by quarter. A total sales by sales agent chart can be used to filter sales over time chart by the selected agent. Finally, a table of the top 5 biggest wins can also be filtered by quarter and/or by sales agent.



Conclusion

An interactive dashboard plays a key role for stakeholders to track business performance and make timely data-driven decisions.

Melvin Marxen has the highest total sales but lowest win rate. His high wins and low average days to close likely made up for the lost deals. Dustin Brinkmann, on the other hand, has the lowest sales despite the high win rate, which can be explained by the low average sale value and the longest average days to close.

Sales metrics were also calculated by sales agents. Darcel Schlecht has the highest total sales, making up more than half of Melvin Marxen's team sales.

A table of engaged opportunities with their respective potential sale values showed that Celia Rouché's team has several engaged opportunities with the product GTK 500. This product has the highest potential sale value, and analysis of sales by product showed that GTK 500 only has 3 sales and a win rate of 43%. This insight presents an opportunity for Celia Rouché's team to close high value sales next quarter. Having this information in the dashboard will help guide team managers to identify which ongoing opportunities to focus on.