CRM Sales Opportunities Analysis Using Power BI

Objective:

Analyze B2B sales pipeline data to evaluate team performance, individual sales agent contributions, quarterly trends, and product win rates. Use Power BI to create actionable and interactive dashboards.

Dataset:

The dataset simulates data from a fictitious computer hardware company and contains:
- Account information
- Product details
- Sales teams
- Sales opportunities

Steps Taken:

1. Install Power BI:

- Download: Go to the official Power BI site and download Power BI Desktop.

- Install: Run the installer and follow setup instructions.

- Launch: Open Power BI Desktop after installation.

2. Set Up Power BI:

- Import Dataset: Select "Get Data" → Load the CRM sales pipeline dataset.

- Clean Data: Use "Transform Data":

 Handled missing values.

 Removed duplicates.

 Correct inconsistent entries.

3. Analysis Tasks:

- Team Performance:

 Compare sales teams based on revenue, win rates, and opportunities closed.

- Sales Agent Performance:

  Identify individual agents who are top performers and laggards.
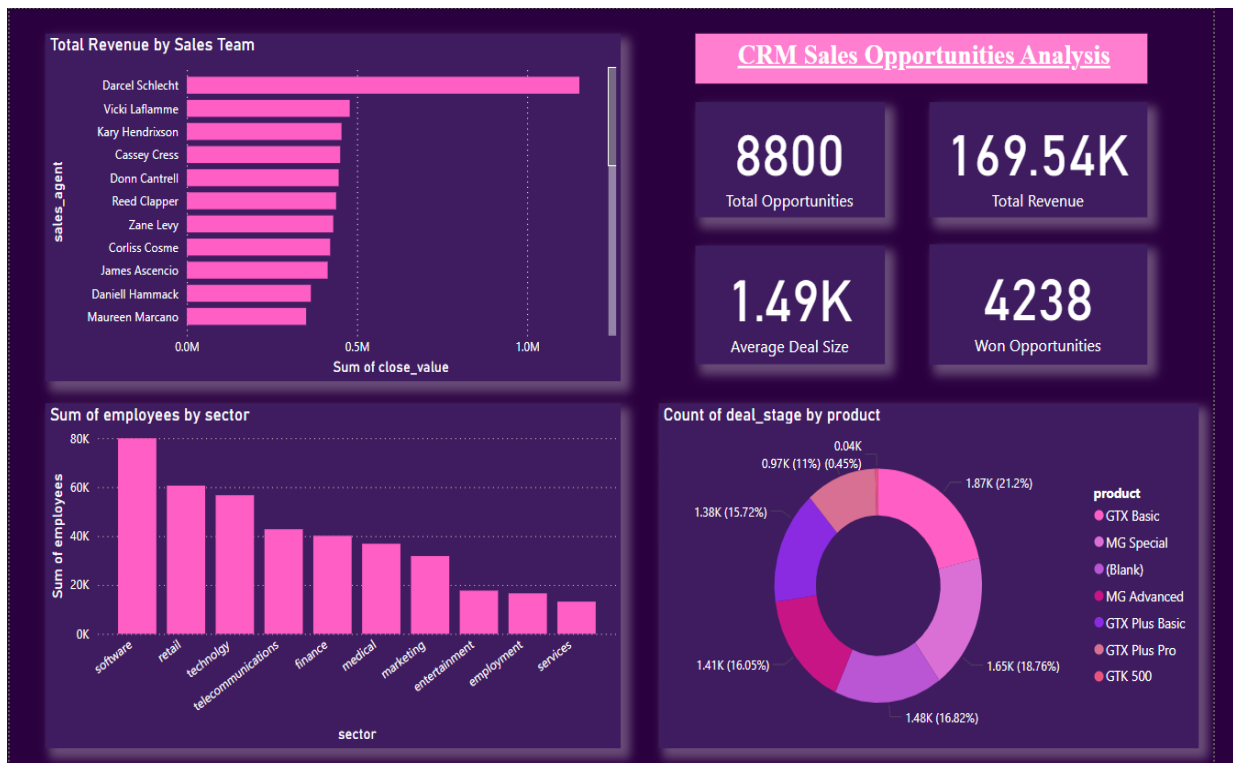- Quarterly Trends:

  Analyze changes in revenue, win rate, and opportunities quarter-over-quarter.
- Product Insights:

  Find products with the highest win rates and revenue contributions.

4. Visualizations:

Page 1: Sales Team Performance Overview

Sales Team Performance:

- Darcel Schlecht generated the highest total revenue among all sales agents.

Overall Sales Metrics:
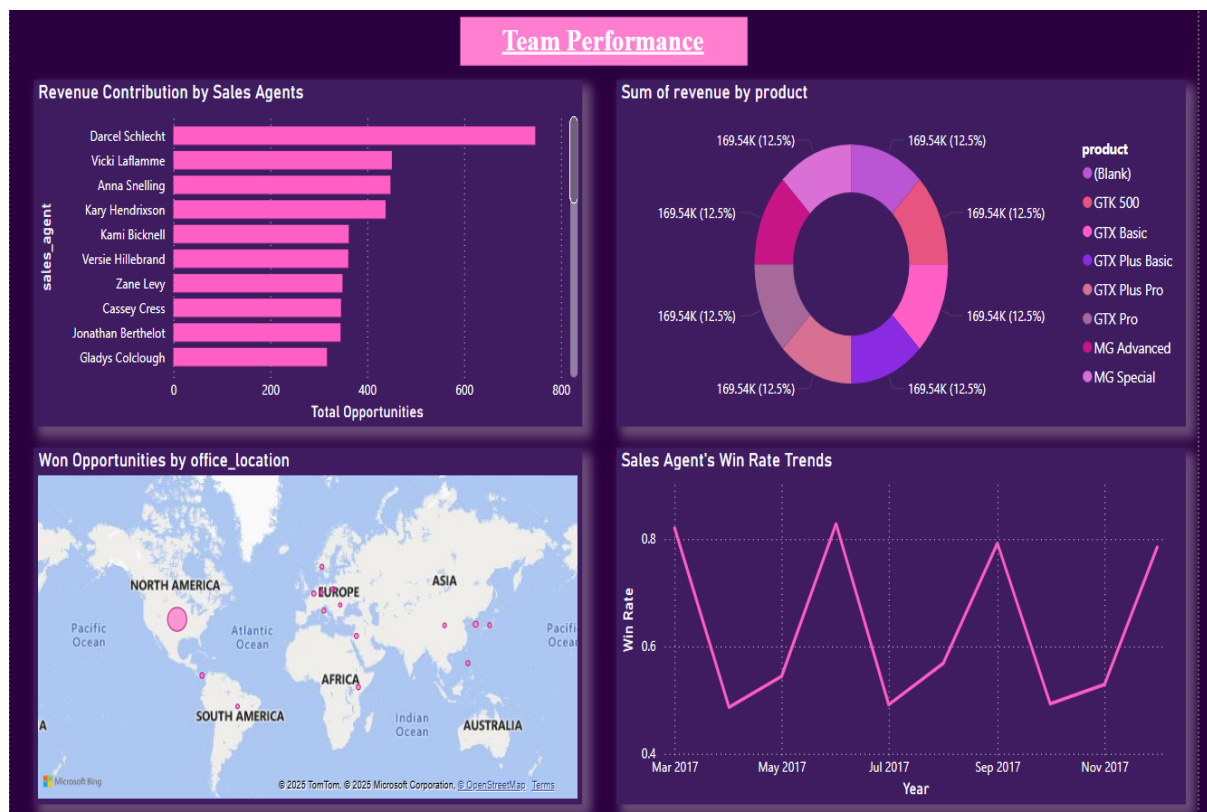
- 8800 total opportunities

- 169.54K total revenue

- 1.49K average deal size

- 4238 won opportunities

Win rate is around 48%, indicating a moderately strong pipeline.

Sector Insights:

- Software sector has the largest employee base, followed by Retail and Technology.

- Services and Employment sectors show the lowest employee numbers.

Page 2: Team Performance

Regional Sales Insights:

- North America has the highest number of won opportunities.

- Moderate sales activity is also seen in Europe, Asia, and Australia.

Win Rate Trends:

- Sales agent's win rates show fluctuations across 2017.

- Peaks observed around March, July, September, and December 2017.

- Lowest win rates around April-May and October 2017.

Page 3: Sales Agent Performance

Count of sales_agent by product

Sales Agent Performance

| sales_agent	Engaging	Lost	Prospecting	Won	Total
Zane Levy	88	100		161	349
Wilburn Farren	31	24		55	110
Violet Mclelland	68	71		122	261
Vicki Laflamme	104	126		221	451
Versie Hillebrand	43	88	54	176	361
Rosie Papadopoulos	39	43		78	160
Rosalina Dieter	50	38		72	160
Reed Clapper		82		155	237
Niesha Huffines	30	70	34	105	239
Moses Frase	34	66	31	129	260
Maureen Marcano	72	64		149	285
Marty Freudenburg	33	72	54	122	281
Markita Hansen	79	97		130	306
Lajuana Vencill	40	104	40	127	311
Kary Hendrixson	103	126		209	438
Kami Bicknell	90	98		174	362
Jonathan Berthelot	33	93	48	171	345
James Ascencio	61	71		135	267
Hayden Neloms	50	45		107	202
Gladys Colclough	36	97	49	135	317
Garret Kinder		48		75	123
Total	1589	2473	500	4238	8800

Win Rate (%) by Month

Sales Agent Performance

- Vicki Laflamme leads with the highest overall activity, followed by Kary Hendrixson and Versie Hillebrand.

- Versie Hillebrand has the highest number of deals won (176), making her the top closer.

Win Rate Trends

- Win rates fluctuate throughout the year, with peaks in March, June, September, and December.

- Lowest win rates observed in April, July, and November.

- The year ends on an upswing with December showing a strong win rate.

Page 4: Quarterly trends analysis
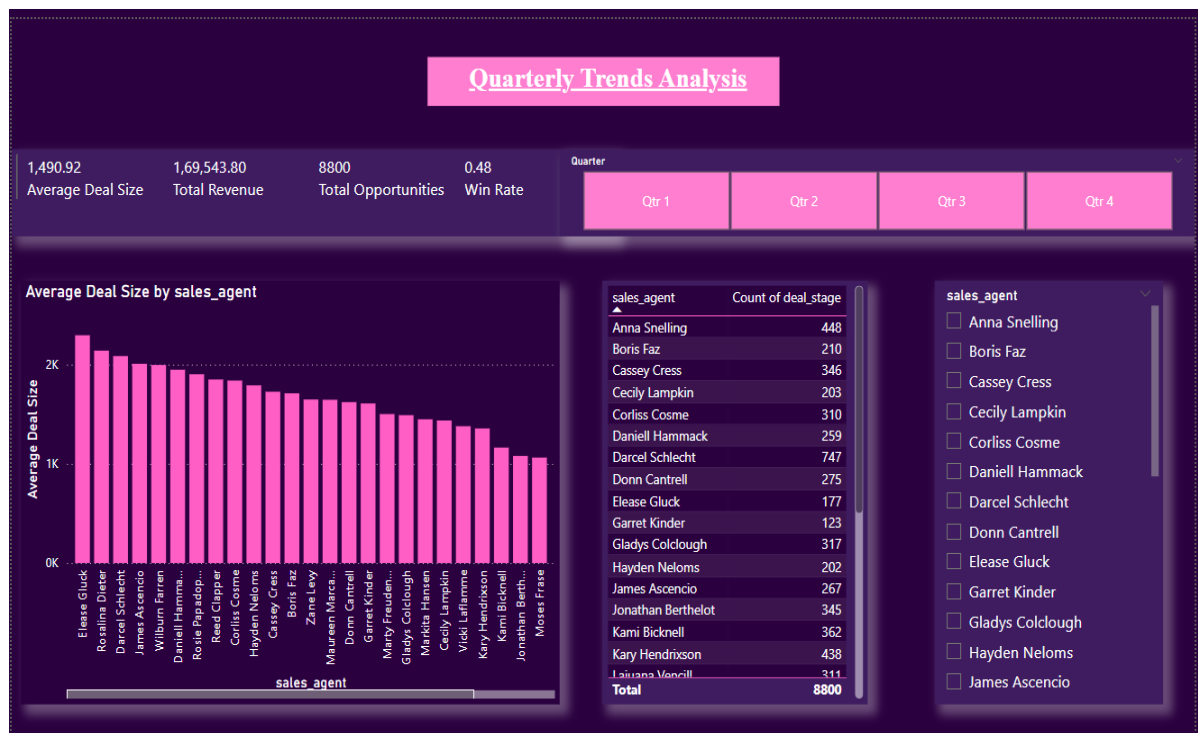
Overall Performance

- Average Deal Size: ₹1,490.92

- Total Revenue: ₹1,69,543.80

- Total Opportunities: 8,800

- Win Rate: 48%

Sales Agent Highlights

- Anna Snelling has the highest number of deal stage entries (448), followed by Darcel Schlecht (747) and Cassey Cress (346).

- Agents such as Moses Frase and Jonathan Berthelot have the lowest average deal sizes among peers.
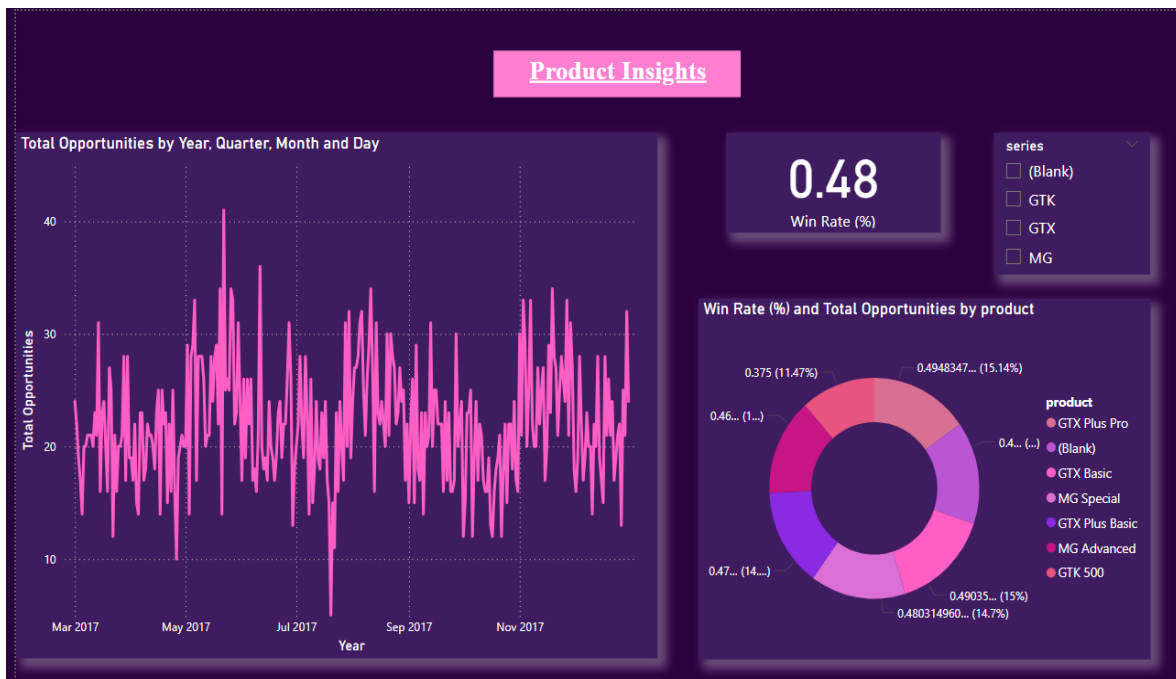
Deal Size Insights

- Top 3 agents by average deal size:

  1. Elease Gluck

  2. Rosalina Dieter

  3. Darcel Schlecht

Activity Trends

- The dashboard supports quarterly filtering, enabling focused trend analysis across Q1 to Q4.

Page 5: Product Insights

Overall Win Rate

- The current overall win rate across all products stands at 48%.

Opportunities Over Time

- Total opportunities showed consistent activity throughout 2017, with noticeable spikes in May, July, and October.

- Opportunity count fluctuated daily, ranging between 10 to 40+ opportunities per day.

Product Performance

- Win rates by product are fairly balanced, with all major products contributing ~11% to 15% of total opportunities.

- Top contributing products (by total opportunities):

    o GTX Basic

    o MG Special

    o GTX Plus Basic

    o MG Advanced

- GTX Plus Pro and GTK 500 show lower opportunity shares, indicating lower sales focus.

Conclusion:

The analysis highlights top agents, key regions, and sales trends, helping optimize sales strategies through Power BI insights.