



*Journey through Market Insights and Beyond*

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*Journey through data*

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## Establish goals

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The first step was to set a goal: Gain insight into the data our sales people had on the industries they were targeting and the service offerings

I had originally planned to create a sale dashboard for tying our front office (sales) to back office (accounting), but there was loads of missing data from the front office application, so that was put on side.





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# Organize Data

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- ❖ I looked at the data sales people had in the application we used and realized it was very scattered and it was making it harder to set goals
- ❖ So I set about gaining insight from the data they were using
- ❖ I started by narrowing down one segment and focusing on that



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# Deciding on Property and Casualty Information

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- ❖ Because our company is over 35 years old, founded by software engineers, servicing the Financial industry, (clients like Zurich Financial, Mercury Insurance, Farmers Insurance, William O'Neil, a load of mortgage companies) we had a lot of data to choose from
- ❖ Chose P&C industry because that's an area we want to increase market share



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# Where to go from here?

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- ❖ Combine this with the sales data from our organization, integrate predictive analytics
- ❖ Look for opportunities to sell FinTech services / Web3 consulting to clients
- ❖ Continue to use Pandas to improve data insight, train back office in how to use Pandas / Python
- ❖ Find ways to encourage sales people to put data into the system
- ❖ *Find talent to help our clients nationally and internationally expand business growth in this area !*
- ❖ Connect with me on LinkedIn to dialogue on selling services to clients <https://www.linkedin.com/in/joannabuickians/>