**CRM SALES DATA OVERVIEW**

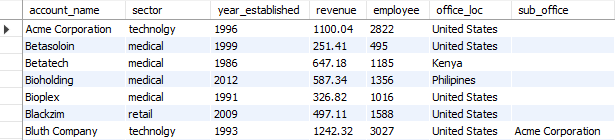
* This project utilizes four interconnected tables to analyze sales performance, product adoption and account development trends.
* The account table contains key information about customer companies. The field name account was unique.
* identifier for the account (PRIMARY KEY).
* Products table contains details of the product offered by the company where the product field was the specific product name (PRIMARY KEY).
* Sales team table maps sales agents to their managers and operational regions where saleagent field represents the ID of the sales agent responsible for the deals(PRIMARY KEY).
* Sales pipeline table captures all sales activities, opportunities and closed deals where opportunity id was the unique identifier for each sales opportunity (PRIMARY KEY), sales agent (FOREIGN KEY), products (FOREIGN KEY) and account (FOREIGN KEY).

**Purpose of this project:**

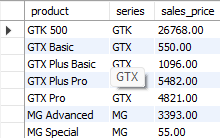
* Analyze sales funnel performance by managers, sales agents and sector.
* Identify high value accounts, products and sectors contributing to the most revenue.
* Track sales pipeline over time(lost opportunity, monthly rates).
* Pinpoint underperforming areas (accounts, managers, agents).

**TABLE INFORMATION:**

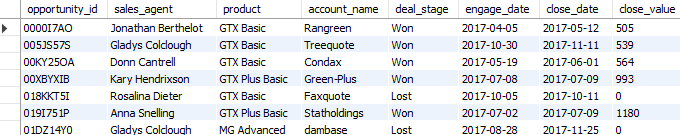
**SELECT \* FROM ACCOUNTS;**



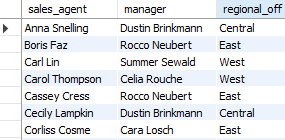
**SELECT \* FROM PRODUCTS;**



**SELECT \* FROM SALES\_PIPELINE;**



**SELECT \* FROM SALES\_TEAM;**



**QUESTION: WHICH ACCOUNTS HAVE AT LEAST WON ONE DEAL, AND WHAT IS THE TOTAL REVENUE FROM THEM?**

**GOAL: IDENTIFY VALUABLE CUSTOMERS CONTRIBUTING TO THE COMPANY REVENUE.**

Query:

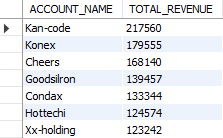
SELECT ACCOUNT\_NAME, SUM(CLOSE\_VALUE) AS TOTAL\_REVENUE

FROM sales\_pipeline

WHERE deal\_stage = "Won"

GROUP BY ACCOUNT\_NAME

ORDER BY TOTAL\_REVENUE DESC;



ANALYSIS: For accounts for Kan-code, konex;we need to focus on retention efforts and loyalty

programs for these accounts since these accounts generating the top revenue

**QUESTION: HOW MANY TOTAL WON DEALS AND LOST DEALS ARE RECORDED PER SALES AGENT?**

**GOAL: EVALUATE BASIC PERFORMANCE OF EACH SALES AGENT.**

SELECT SALES\_AGENT, COUNT(\*) AS TOTAL\_DEALS,

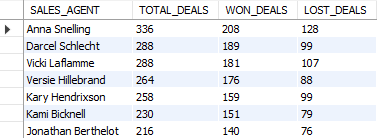
SUM(CASE WHEN DEAL\_STAGE = 'WON' THEN 1 ELSE 0 END) AS WON\_DEALS,

SUM(CASE WHEN DEAL\_STAGE = 'LOST' THEN 1 ELSE 0 END) AS LOST\_DEALS

FROM SALES\_PIPELINE

GROUP BY SALES\_AGENT

ORDER BY WON\_DEALS DESC;



Analysis: This query identifies agents with a high volume of deals,lost deals and the won deals. Anna Snelling has the high volume of deals with the highest winning rate

**QUESTION: WHO ARE THE TOP RANKED SALES AGENTS BASED ON CLOSED DEALS WITHIN EACH OFFICE LOCATION?**

**GOAL: RECOGNIZE TOP REGIONAL PERFORMERS AND STIMULATE COMPETITION ACROSS OFFICES.**

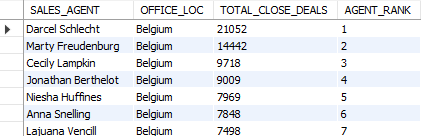
SELECT SP.SALES\_AGENT, A.OFFICE\_LOC, SUM(SP.CLOSE\_VALUE) AS TOTAL\_CLOSE\_DEALS,

DENSE\_RANK() OVER(PARTITION BY A.OFFICE\_LOC ORDER BY SUM(SP.CLOSE\_VALUE) DESC) AS AGENT\_RANK

FROM SALES\_PIPELINE SP

INNER JOIN ACCOUNTS A ON SP.ACCOUNT\_NAME = A.ACCOUNT\_NAME

GROUP BY SP.SALES\_AGENT, A.OFFICE\_LOC;



Analysis:This query identifies high performing sales agents based on their regional office, for example Darcel is the top performer for the USA/Belgium region with the most closed deals. Regions constantly dominated by one or two agents might suggest an over reliance; succession planning is needed.

**QUESTION: WHAT ARE THE TOP SELLING PRODUCTS BY SERIES BASED ON TOTAL SALES PRICE?**

**GOAL: IDENTIFY LEADING PRODUCTS TO OPTIMIZE STOCK AND PROMOTION.**

WITH TOP\_PRODUCT AS

( SELECT PRODUCT, SERIES, SUM(SALES\_PRICE) AS TOTAL\_PRICE,

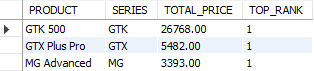
DENSE\_RANK() OVER(PARTITION BY SERIES ORDER BY SUM(SALES\_PRICE) DESC) AS TOP\_RANK

FROM PRODUCTS

GROUP BY PRODUCT, SERIES)

select \* FROM TOP\_PRODUCT

WHERE TOP\_RANK = 1;



The top product here is **GTK 500** and it should be prioritized for marketing, cross selling

and inventory planning while under forming series may need promotional discounts

**QUESTION: HOW LONG DOES IT TAKE ON AVG TO CLOSE A DEAL IN EACH SECTOR?**

**GOAL: BENCHMARK SECTOR SPECIFIC SALE CYCLE TO OPTIMIZE RESOURCE ALLOCATION, FORECAST REVENUE AND SET REALISTIC SALES TARGETS.**

SELECT A.SECTOR, ROUND(AVG(DATEDIFF(SP.CLOSE\_DATE, SP.ENGAGE\_DATE))) AS AVERAGE\_NO\_DAYS

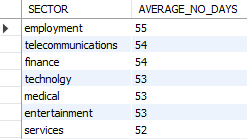
FROM SALES\_PIPELINE SP

INNER JOIN ACCOUNTS A ON SP.ACCOUNT\_NAME = A.ACCOUNT\_NAME

WHERE SP.DEAL\_STAGE = "WON"

GROUP BY A.SECTOR

ORDER BY AVERAGE\_NO\_DAYS DESC;



Analysis: Sectors with longer close time like employment and telecommunications may require longer nurturing and following campaigns. Knowing closed times can improve expected revenue timelines

**QUESTION: WHAT IS THE MOST RECENT DEAL FOR EACH ACCOUNT**

**GOAL:TO MAINTAIN CLIENT ENGAGEMENT AND IDENTIFY NEW RE-ENGAGEMENT OPPORTUNITIES**

WITH MOST\_RECENT\_DEAL AS

(SELECT ACCOUNT\_NAME, CLOSE\_VALUE, DEAL\_STAGE, CLOSE\_DATE,

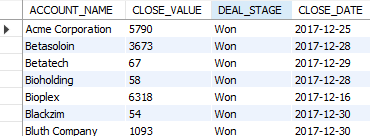
DENSE\_RANK() OVER(partition by ACCOUNT\_NAME ORDER BY CLOSE\_DATE DESC) AS RECENT\_DEAL

FROM SALES\_PIPELINE)

SELECT ACCOUNT\_NAME, CLOSE\_VALUE, DEAL\_STAGE, CLOSE\_DATE

FROM MOST\_RECENT\_DEAL

WHERE RECENT\_DEAL = 1;



Analysis: Orders without recent deals maybe at churn risk - trigger a reactivation campaign and recent wins like acme corporation signal leads for product pitches.

**QUESTION: HOW HAS EACH SALES AGENT REVENUE CHANGED OVER TIME**

**GOAL: TRACK REVENUE GROWTH/DECLINE PER SALES AGENT TO SPOT THE TRENDS EARLY**

WITH SALES\_REVENUE AS

(SELECT SALES\_AGENT, CLOSE\_DATE, SUM(CLOSE\_VALUE) AS CURRENT\_REVENUE,

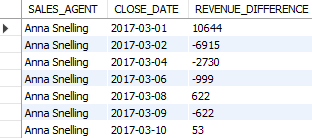
LAG(SUM(CLOSE\_VALUE)) OVER (partition by SALES\_AGENT ORDER BY (CLOSE\_DATE)) AS PREVIOUS\_REVENUE

FROM SALES\_PIPELINE

GROUP BY SALES\_AGENT,CLOSE\_DATE)

SELECT SALES\_AGENT, CLOSE\_DATE, CURRENT\_REVENUE - coalesce(PREVIOUS\_REVENUE,0) AS REVENUE\_DIFFERENCE

FROM SALES\_REVENUE;



Analysis: Agents showing continuous growth can be strong candidates for leadership roles while declining candidates might indicate loss of key accounts.

**QUESTION: WHAT IS EACH ACCOUNTS WIN RATE AND WHICH ACCOUNTS HAVE A WIN RATE BELOW 60%**

**GOAL: IDENTIFY UNDERPERFORMING ACCOUNTS BASED ON DERIVED WIN RATE METRICS**

WITH ACCOUNT\_DEAL AS

(SELECT ACCOUNT\_NAME, COUNT(DEAL\_STAGE) AS TOTAL\_DEALS,

SUM(CASE WHEN DEAL\_STAGE = 'WON' THEN 1 ELSE 0 END) AS WON\_DEALS

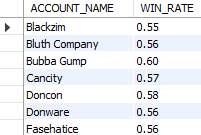
FROM SALES\_PIPELINE

GROUP BY ACCOUNT\_NAME)

SELECT ACCOUNT\_NAME, ROUND(WON\_DEALS/TOTAL\_DEALS,2) AS WIN\_RATE

FROM ACCOUNT\_DEAL

WHERE WON\_DEALS/TOTAL\_DEALS < 0.60;



Analysis: This insight surfaces accounts like blackzim, bluth company are engaging in multiple deals but failing to convert most of them. These accounts need a deeper investigation

**QUESTION: WHAT IS MONTHLY TREND OF TOTAL DEALS,WON DEALS AND LOSS DEALS?**

**GOAL: UNDERSTAND THE SALES PERFORMANCE OVER TIME TO IDENTIFY SEASONALITY OR MOMENTUM SHIFTS.**

SELECT DATE\_FORMAT(CLOSE\_DATE, '%Y-%m') AS MONTHS

FROM SALES\_PIPELINE;

SELECT DATE\_FORMAT(CLOSE\_DATE, '%Y-%m') AS MONTHS, COUNT(DEAL\_STAGE) AS TOTAL\_DEALS,

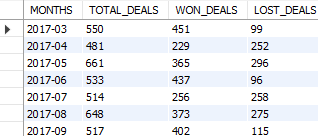
SUM(CASE WHEN DEAL\_STAGE = 'WON' THEN 1 ELSE 0 END) AS WON\_DEALS,

SUM(CASE WHEN DEAL\_STAGE = 'LOST' THEN 1 ELSE 0 END) AS LOST\_DEALS

FROM SALES\_PIPELINE

GROUP BY DATE\_FORMAT(CLOSE\_DATE,'%Y-%m')

ORDER BY MONTHS;



Analysis: Monthly tracking of deal outcomes enables trend detection and forecasting. a spike in losses or dip in wins in certain months can highlight poor campaign timings or product market misfit

**QUESTION: WHICH ACCOUNT HAVE BOTH LOST DEALS AND HAVE SHOWN AN INCREASE IN DEAL VALUE OVER TIME AND WHICH SECTOR DO THEY BELONG TO**

**GOAL: IDENTIFY DETECT UNDERPERFORMING ACCOUNTS DESPITE LOSSES ARE INCREASING IN PURCHASE VALUE, SIGNALING POTENTIAL FOR RECOVERY**

WITH LOST\_DEALS AS

(SELECT SP.ACCOUNT\_NAME, SP.DEAL\_STAGE AS DEAL\_STATUS, A.SECTOR

FROM SALES\_PIPELINE SP

INNER JOIN ACCOUNTS A ON SP.ACCOUNT\_NAME = A.ACCOUNT\_NAME

WHERE SP.DEAL\_STAGE = 'LOST'),

WON\_DEALS AS

(SELECT ACCOUNT\_NAME,CLOSE\_DATE,CLOSE\_VALUE AS CURRENT\_VALUE,

coalesce(LAG(CLOSE\_VALUE) OVER (PARTITION BY ACCOUNT\_NAME ORDER BY CLOSE\_DATE),0) AS PREVIOUS\_VALUE,

COALESCE(CLOSE\_VALUE - LAG(CLOSE\_VALUE) OVER (PARTITION BY ACCOUNT\_NAME ORDER BY CLOSE\_DATE),0) AS CHANGE\_IN\_VALUE

FROM SALES\_PIPELINE

WHERE DEAL\_STAGE = 'WON'

ORDER BY ACCOUNT\_NAME, CLOSE\_DATE)

SELECT WD.ACCOUNT\_NAME, LD.SECTOR, WD.CLOSE\_DATE, WD.CURRENT\_VALUE,

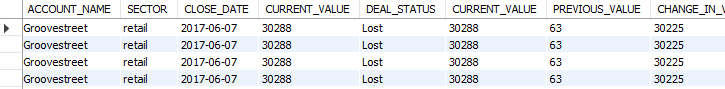
LD.DEAL\_STATUS,

WD.CURRENT\_VALUE, WD.PREVIOUS\_VALUE, WD.CHANGE\_IN\_VALUE

FROM WON\_DEALS WD

INNER JOIN LOST\_DEALS LD ON WD.ACCOUNT\_NAME = LD.ACCOUNT\_NAME

ORDER BY WD.CHANGE\_IN\_VALUE DESC;



Analysis: These accounts reflect mixed performance and are not fully disengaged instead they show purchase value growth

**Q: HOW DO INDIVIDUAL SALES MANAGERS PERFORM IN TERMS OF OVERALL DEAL OUTCOMES, AND WHICH SALES AGENTS UNDER THEM ARE THE MOST EFFECTIVE BASED ON WIN RATE AND TOTAL DEAL VALUE.**

**GOAL: TO PROVIDE LEADERSHIP WITH A COMPREHENSIVE PERFORMANCE SUMMARY OF EACH SALES MANAGER FOCUSING ON AVERAGE DEAL VALUE FROM WON DEALS, WIN RATE PER SALES AGENT, IDENTIFYING THE TOP PERFORMING AGENT PER MANAGER BASED TOTAL DEAL VALUE FROM CLOSED WON DEALS.**

WITH AGENT\_STATS AS

(SELECT ST.MANAGER,SP.SALES\_AGENT, COUNT(SP.DEAL\_STAGE) AS TOTAL\_DEALS,

SUM(SP.CLOSE\_VALUE) AS TOTAL\_VALUE,

SUM(CASE WHEN DEAL\_STAGE = 'WON' THEN 1 ELSE 0 END) AS TOTAL\_WON\_DEAL,

AVG(CASE WHEN DEAL\_STAGE = 'WON' THEN CLOSE\_VALUE ELSE NULL END) AS AVG\_WON\_VALUE

FROM SALES\_PIPELINE SP

INNER JOIN SALES\_TEAM ST ON SP.SALES\_AGENT = ST.SALES\_AGENT

GROUP BY ST.MANAGER, SP.SALES\_AGENT),

AGENT\_RANK AS

(SELECT \*,

RANK() OVER(PARTITION BY MANAGER ORDER BY TOTAL\_VALUE) AS AGENT\_RANK, TOTAL\_WON\_DEAL/TOTAL\_DEALS

AS WIN\_RATE

FROM AGENT\_STATS)

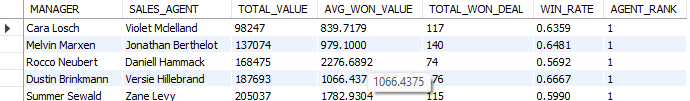
SELECT MANAGER, SALES\_AGENT, TOTAL\_VALUE, AVG\_WON\_VALUE, TOTAL\_WON\_DEAL,

WIN\_RATE, AGENT\_RANK

FROM AGENT\_RANK

WHERE AGENT\_RANK = 1 OR WIN\_RATE > .7

ORDER BY TOTAL\_VALUE, TOTAL\_WON\_DEAL, WIN\_RATE;



Analysis: By aggregating metrics like avg won value, win rate and total won deal, this report

identifies managers like cara,melvin consistently delivered high value deals and sales agent like

Rosalina outperformed others within the same team,the rank() logic pinpoints top agents per manager surfacing high potential talent, filtering for agents or filtering win rate > 70% captures top strong performers who might not be top in raw value but show high efficiency in conversions.

**QUESTION: HOW DO DIFFERENT PRODUCT SERIES PERFORM ACROSS SECTORS IN TERMS OF REVENUE, ACCOUNT ADOPTION AND STRATEGIC ACCOUNT WINS?**

**-- FOR EACH PRODUCT SERIES GENERATE A REPORT THAT SHOWS TOTAL REVENUE GENERATED PER SECTOR FROM WON DEALS ONLY NO OF UNIQUE ACCOUNTS THAT PURCHASED FROM EACH SERIES PER SECTOR THE TOP ACCOUNT(TOTAL CLOSE VALUE) IN EACH SECTOR FOR THAT PRODUCT SERIES**

**GOAL: TO GUIDE PRODUCT STRATEGY AND CROSS FUNCTIONAL ALIGNMENT BETWEEN SALES AND PRODUCT TEAMS BY:**

* MEASURING TOTAL REVENUE PER PRODUCT SERIES PER SECTOR.
* BY COUNTING HOW MANY UNIQUE ACCOUNTS BOUGHT EACH PRODUCT SERIES IN EACH SECTOR, WE CAN SEE HOW WIDELY ADOPTED A PRODUCT IS ACROSS INDUSTRIES.
* HIGHLY TOP REVENUE GENERATING ACCOUNTS PER SECTOR-PRODUCT COMBINATION.
* THIS GIVES CLARITY ON WHERE EACH PRODUCT PERFORMS BEST AND CROSS SELLING OR UPSELLING MAYBE UNDER LEVERAGED.
* AGGREGATE REVENUE PER ACCOUNT PER SERIES AND SECTOR

WITH SECTOR\_REVENUE AS

(SELECT P.SERIES, SP.ACCOUNT\_NAME,SUM(SP.CLOSE\_VALUE) AS TOTAL\_REVENUE,A.SECTOR

FROM SALES\_PIPELINE SP

INNER JOIN PRODUCTS P ON SP.PRODUCT = P.PRODUCT

INNER JOIN ACCOUNTS A ON SP.ACCOUNT\_NAME = A.ACCOUNT\_NAME

WHERE DEAL\_STAGE = 'WON'

GROUP BY P.SERIES, SP.ACCOUNT\_NAME, A.SECTOR

),

SECTOR\_SUMMARY AS

(SELECT SERIES,SECTOR,SUM(TOTAL\_REVENUE) AS TOTAL\_SECTOR\_REVENUE,COUNT(DISTINCT ACCOUNT\_NAME) AS UNIQUE\_ACCOUNTS

FROM SECTOR\_REVENUE GROUP BY SERIES, SECTOR),

TOP\_ACCOUNT\_PER\_SECTOR\_SERIES AS

(SELECT SERIES,SECTOR,ACCOUNT\_NAME,TOTAL\_REVENUE,

RANK() OVER (PARTITION BY SERIES, SECTOR ORDER BY TOTAL\_REVENUE DESC) AS SECTOR\_RANK

FROM SECTOR\_REVENUE

)

SELECT SS.SERIES,SS.SECTOR,SS.TOTAL\_SECTOR\_REVENUE,SS.UNIQUE\_ACCOUNTS,

TP.ACCOUNT\_NAME AS TOP\_ACCOUNT,

TP.TOTAL\_REVENUE AS TOP\_ACCOUNT\_VALUE

FROM SECTOR\_SUMMARY SS

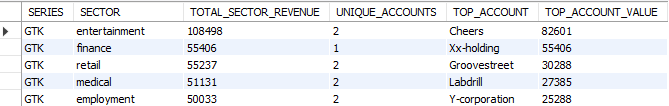
INNER JOIN TOP\_ACCOUNT\_PER\_SECTOR\_SERIES TP

ON SS.SERIES = TP.SERIES

AND SS.SECTOR = TO.SECTOR

WHERE TP.SECTOR\_RANK = 1

ORDER BY SERIES, TOTAL\_SECTOR\_REVENUE DESC;



Analysis: By calculating total revenue only from won deals per product series across sectors shows where each product is generating real sales impact and which sectors are revenue rich for specific series. For example,retail is the top revenue generating sector for gtx series while entertainment is the top revenue generating sector for **GTK**. This breakdown by series and sector gives a complete view of revenue concentration and adoption diversity. it identifies top accounts like y-corp and cheers per sector & series, it uncovers which clients are the most valuable helping in prioritizing retention, custom offers or case studies.if product series like **GTK** is generating 65% of its revenue from entertainment sector, it is a clear to double down on sector specific campaigns.