

Let's see Queries

in MySQL



KPI 1 No of Invoice by Account Executive

```
select * from invoice;
select
  account_executive,
  COUNT(CASE WHEN income_class = 'New' THEN invoice_number END) as new_count,
  COUNT(CASE WHEN income_class = 'Cross Sell' THEN invoice_number END) as cross_sell_count,
  COUNT(CASE WHEN income_class = 'Renewal' THEN invoice_number END) as renewal_count,
  COUNT(invoice_number) as Invoice_count
from invoice
GROUP BY account_executive
ORDER BY invoice_count desc;
```

Output :

	account_executive	new_count	cross_sell_count	renewal_count	Invoice_count
▶	Gilbert	2	0	61	63
	Ketan Jain	9	9	18	36
	Vidit Shah	0	12	15	27
	Vinay	1	19	3	23
	Juli	15	2	5	22
	Animesh Rawat	0	20	0	20
	Abhinav Shivam	0	10	0	10
	Mark	1	2	0	3

KPI 2 Yearly Meeting Count

```
select * from meeting;
select year(meeting_date)as Meeting_Year, count(*)As Meetings_Count
from meeting
group by 1;
```

Output :

	Meeting_Year	Meetings_Count
▶	2019	3
	2020	31

KPI 3 Placed Achievement %, Invoice Achievement % in Cross Sell, New, Renewal

```
USE `project_file`;
DROP procedure IF EXISTS `Data_by_IncomeClass`;

USE `project_file`;
DROP procedure IF EXISTS `project_file`.`Data_by_IncomeClass`;
;

DELIMITER $$
USE `project_file`$$
CREATE DEFINER=`root`@`localhost` PROCEDURE `Data_by_IncomeClass`( IncomeClass varchar(20))
BEGIN
    declare Total_Target double;
# Target, Invoice, Achieved for Cross Sell, New, Renewal
    SET @Cross_Sell_Target = (SELECT SUM(Cross_sell_bugdet) FROM individual_budgets);
    SET @New_Target = (SELECT SUM(New_Budget) FROM individual_budgets);
    SET @Renewal_Target = (SELECT SUM(Renewal_Budget) FROM individual_budgets);
    SET @Invoice_value = (SELECT SUM(Amount) FROM invoice WHERE income_class = IncomeClass);
    SET @Achieved_valu = ((SELECT SUM(Amount) FROM brokerage WHERE income_class = IncomeClass) +
        (SELECT SUM(Amount) FROM fees WHERE income_class = IncomeClass));

    IF IncomeClass = "Cross Sell" THEN SET Total_Target = @Cross_Sell_Target;
        ELSEIF IncomeClass = "New" THEN SET Total_Target = @New_Target;
        ELSEIF IncomeClass = "Renewal" THEN SET Total_Target = @Renewal_Target;
        ELSE SET Total_Target = 0;
    END IF;
```

```

#Percentage of Placed Achievement for Cross Sell, New, and Renewal
    SET @Placed_achievement= (SELECT CONCAT(FORMAT((@Achieved_valu / Total_Target)*100,2),'%'));

#Percentage of Invoice Achievement for Cross Sell, New, and Renewal
    SET @Invoice_achievement= (SELECT CONCAT(FORMAT((@Invoice_value / Total_Target)*100,2),'%'));

# Showinf all the required values
SELECT IncomeClass, Format (Total_Target,0) as Target, Format (@Achieved_valu, 2) as Achieved,
Format (@Invoice_value,0) as Invoice, @Placed_achievement as Placed_Achievement_Percentage,
@Invoice_achievement as Invoice_Achievement_Percentage;

END$$

DELIMITER ;
;

# Calling the KPI 3 -

-- Values for Income Class = "New"
call project_file.Data_by_IncomeClass('new');

-- Values for Income Class = "Cross Sell"
call project_file.Data_by_IncomeClass('Cross Sell');

-- Values for Income Class = "Renewal"
call project_file.Data_by_IncomeClass('Renewal');

```

Output:

	IncomeClass	Target	Achieved	Invoice	Placed_Achievement_Percentage	Invoice_Achievement_Percentage
▶	cross sell	20,083,111	13,034,253.30	3,040,813	64.90%	15.14%

	IncomeClass	Target	Achieved	Invoice	Placed_Achievement_Percentage	Invoice_Achievement_Percentage
▶	new	19,673,793	3,531,629.31	827,822	17.95%	4.21%

	IncomeClass	Target	Achieved	Invoice	Placed_Achievement_Percentage	Invoice_Achievement_Percentage
▶	renewal	12,319,455	18,507,270.64	8,394,071	150.23%	68.14%

KPI 4 Stage Funnel by Revenue

```
select * from opportunity;
select stage , Sum(revenue_amount) as Revenue from opportunity
group by 1
order by 2 desc;
```

Output :

	stage	Revenue
▶	Qualify Opportunity	5919500
	Negotiate	899000
	Propose Solution	60000

KPI 5 No of meeting By Account Exe

```
select Account_executive as Executive_name,count(account_executive)
as Meeting_count
from meeting
group by 1
order by 2 desc;
```

Output :

	Executive_name	Meeting_count
▶	Abhinav Shivam	7
	Vinay	5
	Animesh Rawat	4
	Ketan Jain	4
	Shivani Sharma	4
	Gilbert	3
	Manish Sharma	3
	Raju Kumar	2
	Mark	2

KPI 6 Top Open Opportunity

```
select * from opportunity;
select opportunity_name, sum(revenue_amount) as
Revenue_Amount from opportunity
group by 1
order by 2 desc
limit 5;
```

Output :

	opportunity_name	Revenue_Amount
►	Fire	500000
	EL-Group Medidaim	400000
	DB -Mega Policy	400000
	CVP GMC	350000
	FM-Group Medidaim	300000

Opportunity Product Distribution

```
select * from opportunity;
select product_group, count(*) as Poduct_Grp_Opportunity from opportunity
group by 1
order by 2 desc;
```

Output :

	product_group	Poduct_Grp_Opportunity
	Employee Benefits	15
	Fire	13
	Marine	7
	Engineering	6
	Liability	5
	Miscellaneous	2
	Terrorism	1