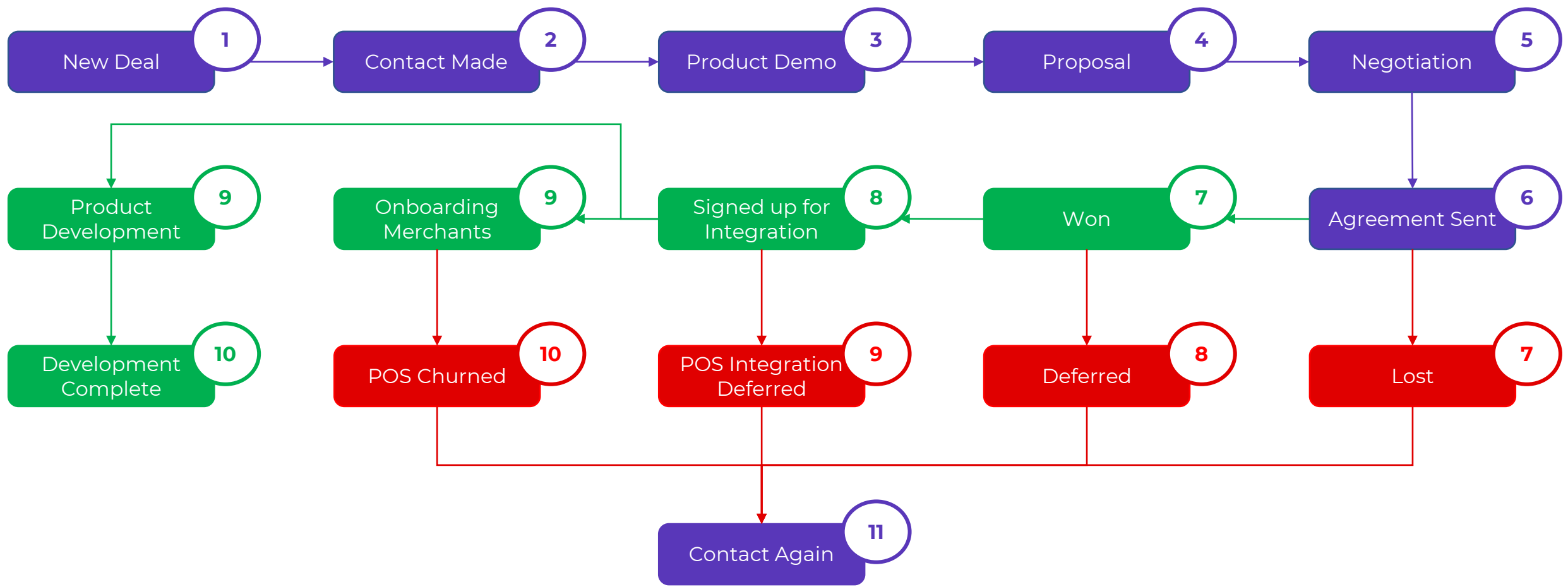


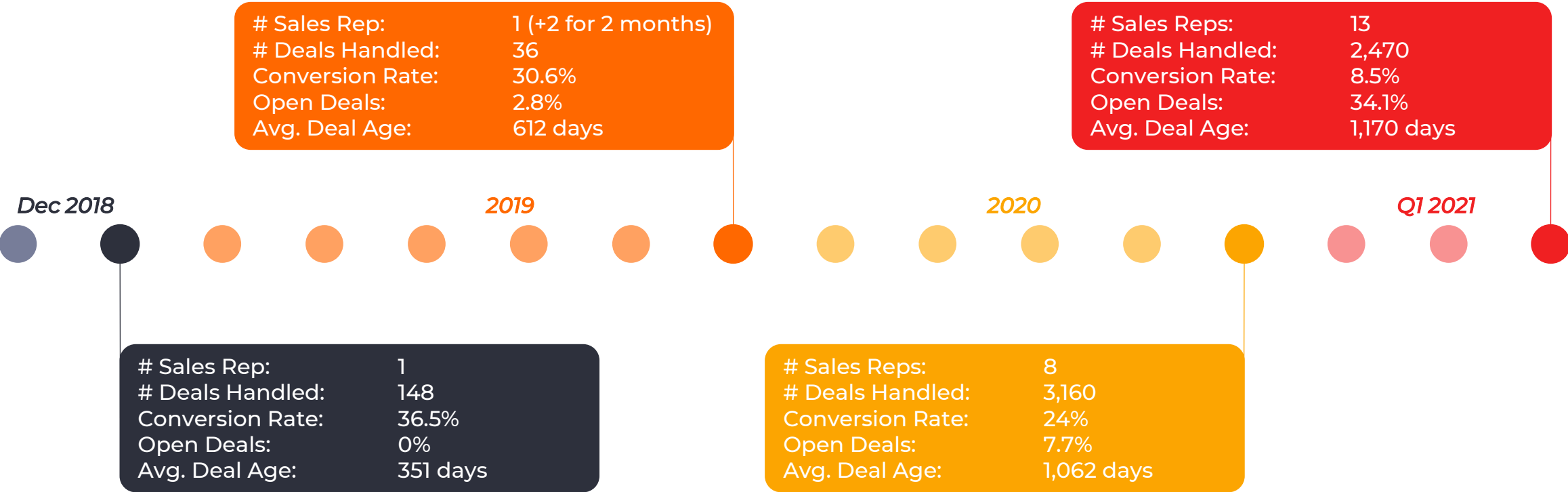
# Sales CRM Analysis

- ❖ Sales Cycle
- ❖ Data Exploration: Summary Statistics
- ❖ Q1: Which cities to focus on?
- ❖ Q2: Monthly Volume Recommendation
- ❖ Q3: # Sales Reps Required to acquire 10,000 Outlets

# Sales Cycle at UrbanPiper



17.8% Conversion Rate over ~5k deals since Dec 2018



**Which cities should we be focusing more on and why?**

# Top 10 focus cities out of 60 based on Potential Outlets (YTD 2021) that could be acquired assuming performance remains consistent from last year

$$\text{YTD 2021 Potential Outlets that could be acquired} = \text{Volume of Open Deals} \times \text{Outlets per Deals Handled in 2020*} \times \text{Past Conversion Rate}$$

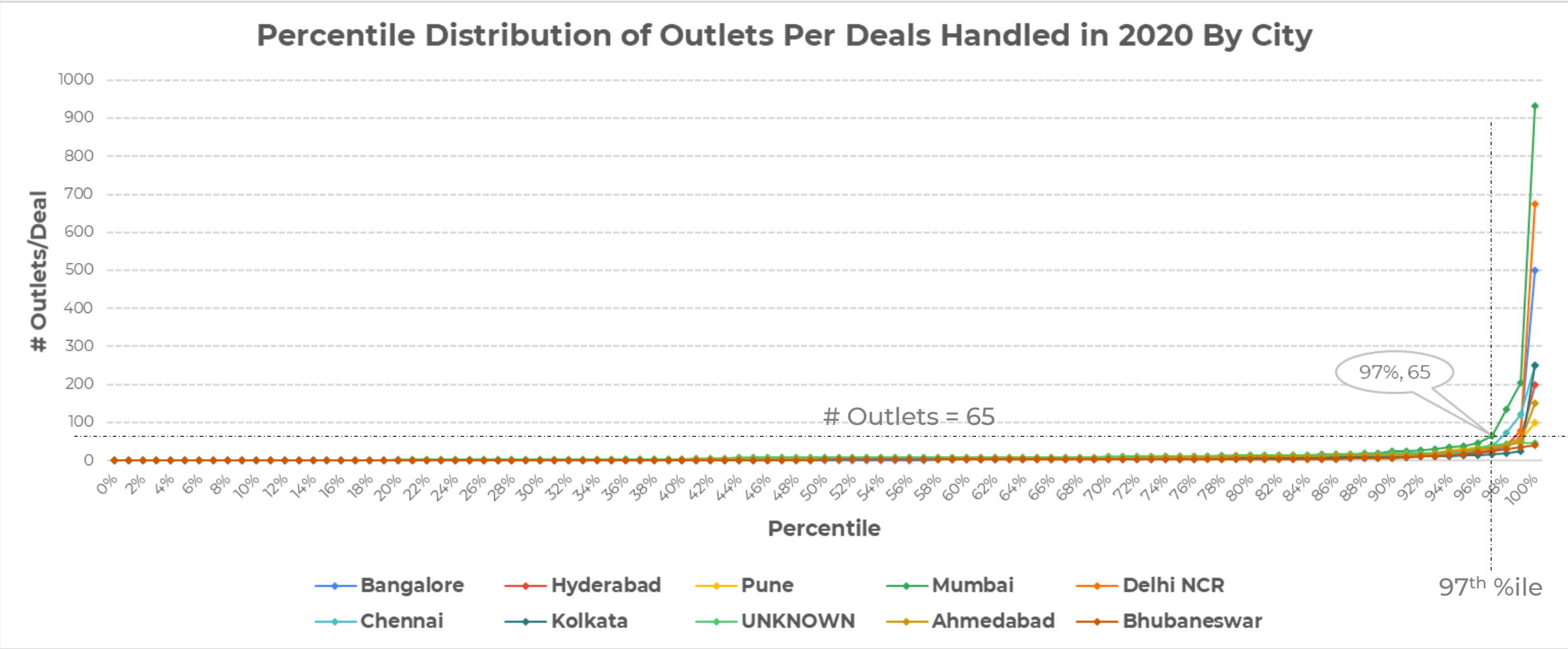
City	Potential Outlets (YTD 2021)	# Open Deals (2021)	Outlets per Deal (2020)	% Deals Won (2020)
Delhi NCR	1337	134	34	29%
Mumbai	1312	85	65	24%
Bangalore	930	153	25	24%
Chennai	821	92	39	23%
Kolkata	587	68	17	52%
Hyderabad	471	65	31	24%
Pune	370	37	39	26%
UNKNOWN	151	80	40	5%
Ahmedabad	114	24	33	14%
Bhubaneswar	99	9	26	43%

Priority

High  
Medium  
Low

\*Outlets per Deal handled in 2020: 97<sup>th</sup> percentile is chosen as the cut-off for each city (refer next slide)

97<sup>th</sup> percentile provides a balanced assumption on outlets handled per deal considering the outliers present in the data



%ile cut-off or median provides a better representation of outlets per deal handled considering the average would be skewed by the few deals with very high outlets (right tailed distribution)

Note: Only top 10 cities from the previous slide are filtered in this chart

**How many deals should be assigned to a sales rep to close 10-15 deals in a month?**

Monthly Performance of sales reps show that some have very few datapoints captured to be analysed and few variation amongst the rest

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- Deals handled per month is fairly consistent for DS and MJ hence their average deals handled per month is close to the 50<sup>th</sup> percentile
- Everyone else handles exceptionally greater volume of deals in a few odd months than their usual monthly performance skewing their overall performance

Deals Handled Per Month by Sale Rep

Statistic	AIB	AR	AS	DJ	DS	JHM	JM	KS	MJ	MPS	PN	SG	SS	UNKNOWN
Average	28	112	4	36	69	25.333	67	75	74	13	127	3	132	7
0 %ile	2	112	4	1	2	5	1	1	1	1	55	3	6	1
25 %ile	3	112	4	2	14	18.5	4	2	12	4	74.5	3	73	1
50 %ile	8	112	4	8	60	32	19	2	89	7	94	3	94	1
99 %ile	134	112	4	336	163	39	339	349	159	38	229	3	371	19

- Most reps meet their monthly target <25% of the time, with the exception of DS (60%) and SS (90%)

Monthly Targets by Sale Rep

KPI	AIB	AR	AS	DJ	DS	JHM	JM	KS	MJ	MPS	PN	SG	SS	UNKNOWN
# Months Worked	9	1	1	20	10	3	13	7	10	8	3	1	10	3
# Months Target Achieved	2	0	0	2	6	0	3	1	2	0	1	0	9	0
% Months Target Achieved	22%	0%	0%	10%	60%	0%	23%	14%	20%	0%	33%	0%	90%	0%

Insufficient Data Points



# By excluding the sales reps with insufficient data, we have a sample set that can be further analysed

Step 1/3: Highlight cells with Conversion Rate greater than 18%

Month	# Deals Handled (% Conversion Rate)														Grand Total
	AIB	AR	AS	DJ	DS	JHM	JM	KS	MJ	MPS	PN	SG	SS	UNKNOWN	
Dec 2018				129 (42%)										19 (0%)	148 (36%)
Jan 2019				20 (15%)											20 (15%)
Feb 2019				1 (100%)											1 (100%)
Mar 2019				2 (50%)											2 (50%)
May 2019							1 (100%)								1 (100%)
Jun 2019				1 (100%)			1 (100%)								2 (100%)
Aug 2019				4 (25%)			2 (50%)							1 (0%)	7 (29%)
Sep 2019				1 (100%)										1 (0%)	2 (50%)
Oct 2019				1 (0%)											1 (0%)
Jan 2020				11 (45%)											11 (45%)
Feb 2020				385 (10%)											385 (10%)
Mar 2020				1 (100%)			129 (22%)			5 (0%)					135 (21%)
Apr 2020										1 (0%)					1 (0%)
Jun 2020					2 (100%)			3 (100%)	1 (100%)	38 (0%)			71 (92%)		115 (62%)
Jul 2020	4 (100%)			11 (0%)	8 (88%)		364 (0%)	2 (100%)	5 (80%)	32 (0%)			6 (17%)		432 (4%)
Aug 2020	26 (100%)			19 (5%)	14 (79%)		101 (0%)	1 (100%)	13 (46%)	1 (0%)			48 (65%)		223 (34%)
Sep 2020	141 (87%)			2 (0%)	14 (93%)		159 (22%)	361 (38%)	11 (82%)				99 (41%)		787 (45%)
Oct 2020	3 (100%)			33 (0%)	33 (70%)		19 (11%)	2 (100%)	162 (16%)				100 (28%)		352 (24%)
Nov 2020	2 (100%)			23 (0%)	114 (6%)		18 (22%)	1 (100%)	114 (4%)				77 (23%)		349 (10%)
Dec 2020	2 (100%)			16 (0%)	86 (6%)		27 (56%)		106 (4%)				133 (12%)		370 (11%)
Jan 2021	14 (0%)			56 (2%)	120 (14%)	5 (0%)	47 (0%)	156 (0%)	124 (4%)	7 (0%)	232 (13%)		376 (3%)		1137 (6%)
Feb 2021	50 (4%)			2 (0%)	131 (11%)	39 (3%)	5 (20%)		71 (13%)	7 (0%)	55 (16%)	3 (33%)	317 (8%)		680 (9%)
Mar 2021	8 (100%)	112 (4%)	4 (50%)	2 (0%)	166 (15%)	32 (25%)	4 (50%)		132 (11%)	10 (0%)	94 (6%)		89 (16%)		653 (13%)
Grand Total	250 (68%)	112 (4%)	4 (50%)	720 (15%)	688 (18%)	76 (12%)	877 (10%)	526 (28%)	739 (11%)	101 (0%)	381 (12%)	3 (33%)	1316 (19%)	21 (0%)	5814 (18%)

- Setting the Overall Conversion Rate (18%) as the benchmark to compare individual sales reps' monthly performance leaves us with the above highlighted datapoints

# By excluding the sales reps with insufficient data, we have a sample set that can be further analysed

Step 2/3: Highlight cells with Conversion Rate greater than 10%

Month	# Deals Handled (% Conversion Rate)														Grand Total
	AIB	AR	AS	DJ	DS	JHM	JM	KS	MJ	MPS	PN	SG	SS	UNKNOWN	
Dec 2018				129 (42%)										19 (0%)	148 (36%)
Jan 2019				20 (15%)											20 (15%)
Feb 2019				1 (100%)											1 (100%)
Mar 2019				2 (50%)											2 (50%)
May 2019							1 (100%)								1 (100%)
Jun 2019				1 (100%)			1 (100%)								2 (100%)
Aug 2019				4 (25%)			2 (50%)							1 (0%)	7 (29%)
Sep 2019				1 (100%)										1 (0%)	2 (50%)
Oct 2019				1 (0%)											1 (0%)
Jan 2020				11 (45%)											11 (45%)
Feb 2020				385 (10%)											385 (10%)
Mar 2020				1 (100%)			129 (22%)			5 (0%)					135 (21%)
Apr 2020										1 (0%)					1 (0%)
Jun 2020					2 (100%)			3 (100%)	1 (100%)	38 (0%)			71 (92%)		115 (62%)
Jul 2020	4 (100%)			11 (0%)	8 (88%)		364 (0%)	2 (100%)	5 (80%)	32 (0%)			6 (17%)		432 (4%)
Aug 2020	26 (100%)			19 (5%)	14 (79%)		101 (0%)	1 (100%)	13 (46%)	1 (0%)			48 (65%)		223 (34%)
Sep 2020	141 (87%)			2 (0%)	14 (93%)		159 (22%)	361 (38%)	11 (82%)				99 (41%)		787 (45%)
Oct 2020	3 (100%)			33 (0%)	33 (70%)		19 (11%)	2 (100%)	162 (16%)				100 (28%)		352 (24%)
Nov 2020	2 (100%)			23 (0%)	114 (6%)		18 (22%)	1 (100%)	114 (4%)				77 (23%)		349 (10%)
Dec 2020	2 (100%)			16 (0%)	86 (6%)		27 (56%)		106 (4%)				133 (12%)		370 (11%)
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Feb 2021	50 (4%)			2 (0%)	131 (11%)	39 (3%)	5 (20%)		71 (13%)	7 (0%)	55 (16%)	3 (33%)	317 (8%)		680 (9%)
Mar 2021	8 (100%)	112 (4%)	4 (50%)	2 (0%)	166 (15%)	32 (25%)	4 (50%)		132 (11%)	10 (0%)	94 (6%)		89 (16%)		653 (13%)
Grand Total	250 (68%)	112 (4%)	4 (50%)	720 (15%)	688 (18%)	76 (12%)	877 (10%)	526 (28%)	739 (11%)	101 (0%)	381 (12%)	3 (33%)	1316 (19%)	21 (0%)	5814 (18%)

- Relaxing the Conversion Rate to 10% helps include instances where a Sales Rep handled an extremely large volume of Deals which seems to impact the quality of Monthly Conversion Rate but still meets the monthly target of 10 Deals

# By excluding the sales reps with insufficient data, we have a sample set that can be further analysed

Step 3/3: Highlight cells with Conversion Rate between 10% and 18% with at least 10 deals won

# Deals Handled (% Conversion Rate)															
Month	AIB	AR	AS	DJ	DS	JHM	JM	KS	MJ	MPS	PN	SG	SS	UNKNOWN	Grand Total
Dec 2018				129 (42%)										19 (0%)	148 (36%)
Jan 2019				20 (15%)											20 (15%)
Feb 2019				1 (100%)											1 (100%)
Mar 2019				2 (50%)											2 (50%)
May 2019							1 (100%)								1 (100%)
Jun 2019				1 (100%)			1 (100%)								2 (100%)
Aug 2019				4 (25%)			2 (50%)							1 (0%)	7 (29%)
Sep 2019				1 (100%)										1 (0%)	2 (50%)
Oct 2019				1 (0%)											1 (0%)
Jan 2020				11 (45%)											11 (45%)
Feb 2020				385 (10%)											385 (10%)
Mar 2020				1 (100%)			129 (22%)			5 (0%)					135 (21%)
Apr 2020										1 (0%)					1 (0%)
Jun 2020					2 (100%)			3 (100%)	1 (100%)	38 (0%)			71 (92%)		115 (62%)
Jul 2020	4 (100%)			11 (0%)	8 (88%)		364 (0%)	2 (100%)	5 (80%)	32 (0%)			6 (17%)		432 (4%)
Aug 2020	26 (100%)			19 (5%)	14 (79%)		101 (0%)	1 (100%)	13 (46%)	1 (0%)			48 (65%)		223 (34%)
Sep 2020	141 (87%)			2 (0%)	14 (93%)		159 (22%)	361 (38%)	11 (82%)				99 (41%)		787 (45%)
Oct 2020	3 (100%)			33 (0%)	33 (70%)		19 (11%)	2 (100%)	162 (16%)				100 (28%)		352 (24%)
Nov 2020	2 (100%)			23 (0%)	114 (6%)		18 (22%)	1 (100%)	114 (4%)				77 (23%)		349 (10%)
Dec 2020	2 (100%)			16 (0%)	86 (6%)		27 (56%)		106 (4%)				133 (12%)		370 (11%)
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Feb 2021	50 (4%)			2 (0%)	131 (11%)	39 (3%)	5 (20%)		71 (13%)	7 (0%)	55 (16%)	3 (33%)	317 (8%)		680 (9%)
Mar 2021	8 (100%)	112 (4%)	4 (50%)	2 (0%)	166 (15%)	32 (25%)	4 (50%)		132 (11%)	10 (0%)	94 (6%)		89 (16%)		653 (13%)
Grand Total	250 (68%)	112 (4%)	4 (50%)	720 (15%)	688 (18%)	76 (12%)	877 (10%)	526 (28%)	739 (11%)	101 (0%)	381 (12%)	3 (33%)	1316 (19%)	21 (0%)	5814 (18%)

✓ **Recommendation:** Assuming 10-18% conversion rate, every sales rep should aim to handle at least 90-130 Deals in a month to hit their monthly targets

**Assuming one person can close up to 10-15 deals in a month, how many salespeople will you need to close 10,000 outlets in a year? to perform this job efficiently. From a company point of view, it is desirable to have the least amount of salespeople**

# To determine this we need to identify the factors that influence the number of outlets acquired in a given month/year

The following factors could be considered:

- Deals Per Rep per Month
- Outlets per Deal
- Proportion of Restaurant Segments Won
- Avg. Deal Handling Time
- City
- Seasonality (Monthly/Quarterly)

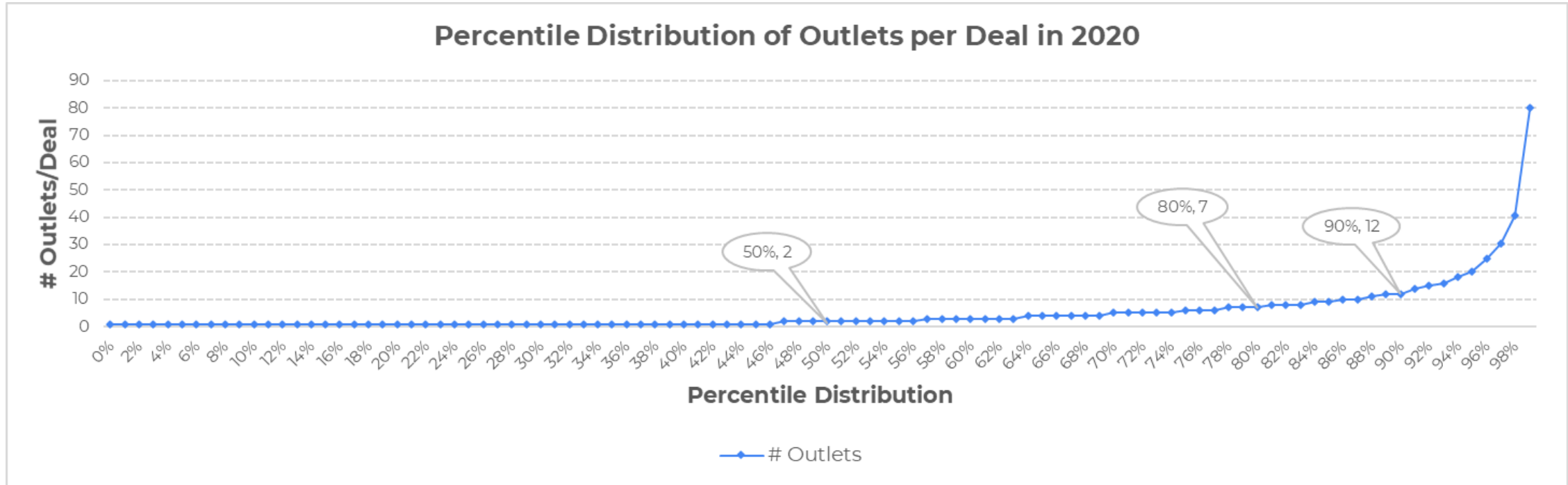
**Objective:** The objective is to optimize the above mentioned parameters to achieve the target of 10,000 deals in a year by minimizing the estimation of number of sales reps required

## Constraints:

1. # Deals Won per Rep: 10 to 15 per month (*Given Assumption*)
2. Outlets per Deal: Upper and Lower bounds for simulation to be determined (*To be calculated using outlets distribution*)
3. # Large, Medium, Small Segment Deals: To be determined based on what is the proportion of Large Segment Deals in 2020
4. # Outlets per Restaurant Segment: To be determined based on the distribution of Outlets per deal in 2020 split by Restaurant Segment

# Sample Estimation using 2 Parameters: # Outlets per deal & # Deals won in a month

- As a simple simulation we can use the below graph to determine the aggregate outlets per deal to consider while calculating minimum number of sales reps required to acquire 10,000 outlets in a year



KPIs	Percentile		
	50%	80%	90%
# Outlets/deal	2	7	12
# Deals/rep/month	15	15	15
Target Outlets	10,000	10,000	10,000
# Sales Reps	28	8	5

This estimate can be improved by adding additional granularity like:

- Restaurant Segment
- City
- Seasonality (Monthly/Quarterly)
- Avg Deal Handling Time... etc.,