

Sales Performance Monitoring Report

Sales Performance & Growth Monitoring Report

(推广增长团队业绩监控分析报告)

Disclaimer: This project simulates a real-world scenario for an Internet Finance (Fintech) offline sales team. The analysis focuses on KPI tracking, efficiency analysis, and product portfolio optimization.

1. Data Preparation & Logic (数据准备与逻辑)

To ensure accurate performance tracking, complex SQL queries were written to clean and aggregate data.

Key Logic Implemented (SQL):

- **2ms Performance Calculation:** Defined "Effective Performance" as transactions occurring within **2 months** of the user's first successful loan. This filters out low-quality or delayed conversions.
 - **Employee Status Handling:** Used case when logic to dynamically categorize staff as "Active", "Resigned", or "New Joiner" based on the snapshot date (June 2020).
 - **Commission Computation:** Calculated performance bonuses based on product duration (e.g., **2.0%** for 12-month products vs. **0.5%** for 3-month products).

```

select
,2msjx.销售ID
,2msjx.职务
,2msjx.小组
,2msjx.分行
,2msjx.入职日期
,2msjx.离职日期
,2msjx.6月份在职情况

,2msjx.满标月份
,sum(2msjx.amount)
,sum(2msjx.amount_2ms)

,sum(case when 2msjx.产品期限 = 1 then 0*2msjx.amount_2ms
        when 2msjx.产品期限 = 3 then 0.005*2msjx.amount_2ms
        when 2msjx.产品期限 = 6 then 0.015*2msjx.amount_2ms
        when 2msjx.产品期限 = 9 then 0.018*2msjx.amount_2ms
        when 2msjx.产品期限 = 12 then 0.02*2msjx.amount_2ms
        when 2msjx.产品期限 = 18 then 0.02*2msjx.amount_2ms
        else -1 end
) 2ms绩效

from
(
    select
    midw.listing_id 标ID
    ,midw.user_id 用户ID
    ,midw.bid_sale_id 销售ID

    ,sif.job_name 职务
    ,sif.team 小组
    ,sif.branch 分行

    ,cast(sif.reg_time as date) 入职日期
    ,cast(sif.leave_time as date) 离职日期

    ,case when cast(sif.reg_time as date) < '2020-06-01' and (cast(sif.leave_time as date) > '2020-06-01' or cast(sif.leave_time as date) is null)
        then '在职'
        when cast(sif.reg_time as date) < '2020-06-01' and cast(sif.leave_time as date) < '2020-06-01'
        then '离职'
        when cast(sif.reg_time as date) between '2020-06-01' and '2020-06-30'
        then '在岗'
        when cast(sif.reg_time as date) > '2020-06-30'
        then '未入职'
        else '未知' end 6月份在职情况

    ,substring(midw.fullbid_date,1,7) 满标月份
    ,midw.amount amount
)
```

```

, case when cast(midw.cre_dt as date) <= date_add(cast(uif.cmdat_mmv_suc_ft as date),interval 2 month) then midw.amount
      else 0 end amount_2ms
      ,midw.months          //产品期限

from edw.dsx_listing_info midw
left join edw.s_dsx_user_info_daily uif
on midw.user_id = uif.user_id
left join edw.s_dsx_saler_info sif
on midw.bid_sale_id = sif.sale_id #发标销售信息

where midw.fullbid_date != 'null'
and substring(midw.fullbid_date,1,7) = '2020-06'
and uif.cmdat_mmv_suc_ft != 'null'
and cast(uif.cmdat_mmv_suc_ft as date) <= '2020-06-30'
#order by midw.fullbid_date
) 2msjx
group by 1,2,3,4,5,6,7,8
order by 10 desc

```

2. Branch KPI Achievement (分行目标达成情况)

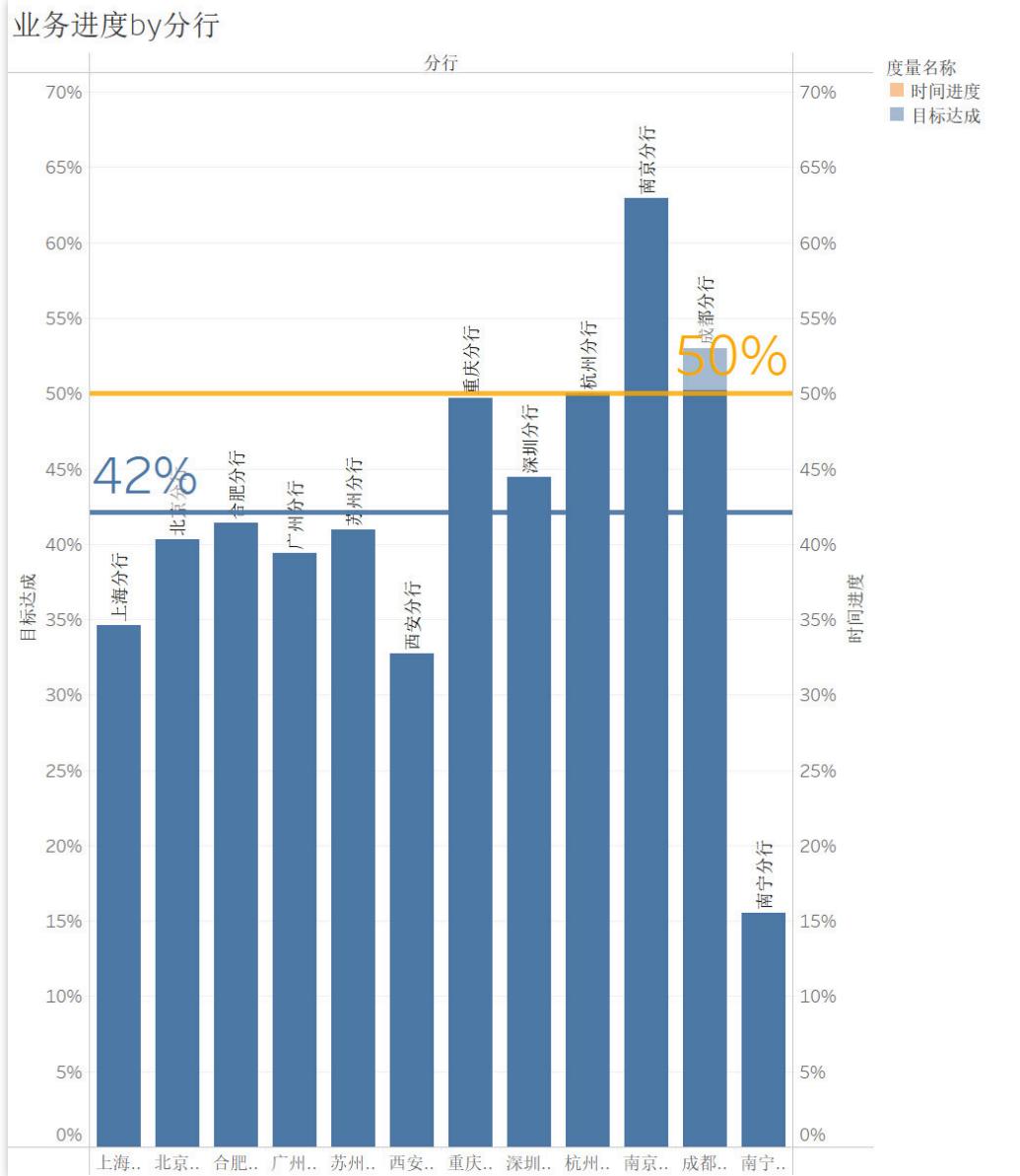


Chart Title: Figure 1: Monthly Target Achievement Rate by Branch (June 2020)

Key Insights:

- **Top Performer:** Nanjing Branch achieved **63%** of the target, significantly outperforming the company average (42%).
- **Underperformer:** Shanghai Branch only reached **35%**, dragging down the overall region.

- Time Progress Alert:** With **50% of the month passed** (assuming mid-month review), most branches are behind schedule (avg. 42%). Urgent intervention is needed for Shanghai and Xi'an branches.
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3. Sales Efficiency Analysis (人效分析)

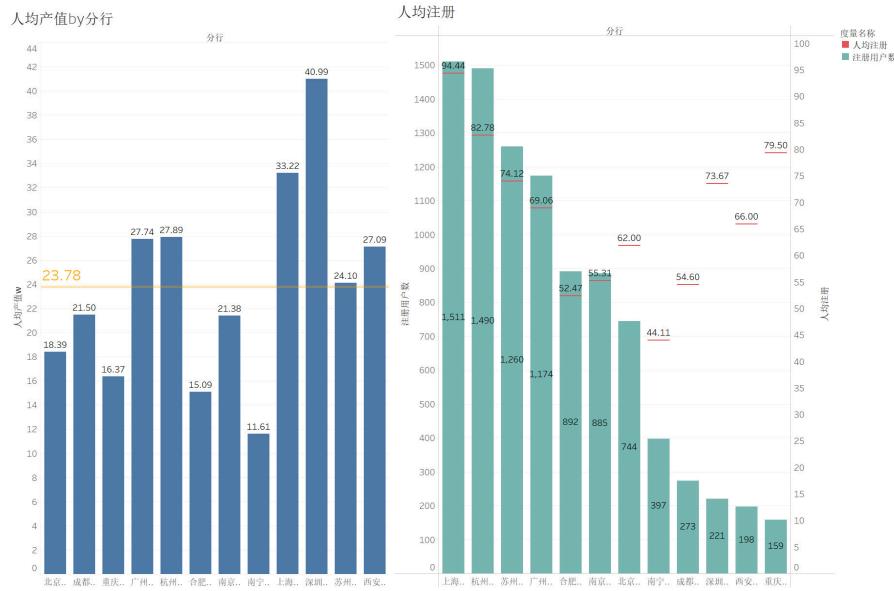


Chart Title: Figure 2: Revenue Per Capita & Acquisition Efficiency

Key Insights:

- High Efficiency: Shenzhen Branch** leads with **40.99w RMB** revenue per capita, almost double the average (21.95w). This suggests a highly effective sales team or high-value client base.
 - Low Conversion: Shanghai Branch** has the highest "Acquisitions Per Capita" (94.44 users) but low revenue per capita (11.61w). This indicates a **quality issue**: sales are bringing in many users, but they are not converting into high-value loans.
 - Action:** Shanghai team needs to shift focus from "Quantity" (Acquisition) to "Quality" (Conversion).
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4. User Acquisition Drill-down (获客下钻分析)

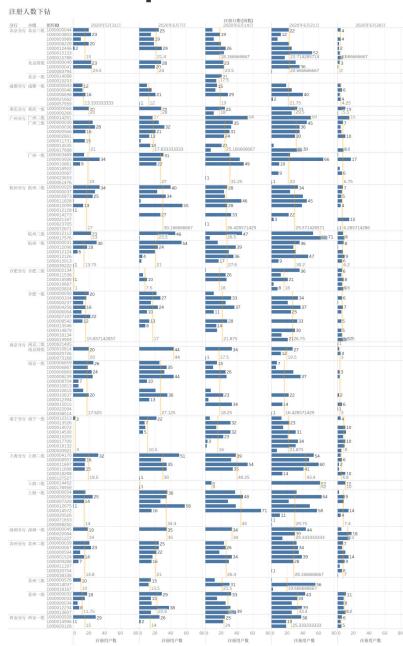


Chart Title: Figure 3: Weekly User Registration Trend by Sales Group

Key Insights:

- Traffic Decline:** A noticeable drop in user registrations was observed in **Week 3 of June** across multiple branches (e.g., Beijing Group 1, Chengdu Group 1).
- Root Cause:** The drill-down view allows us to pinpoint specific sales groups responsible for the decline, enabling targeted coaching.

5. Product Portfolio Analysis (产品结构分析)

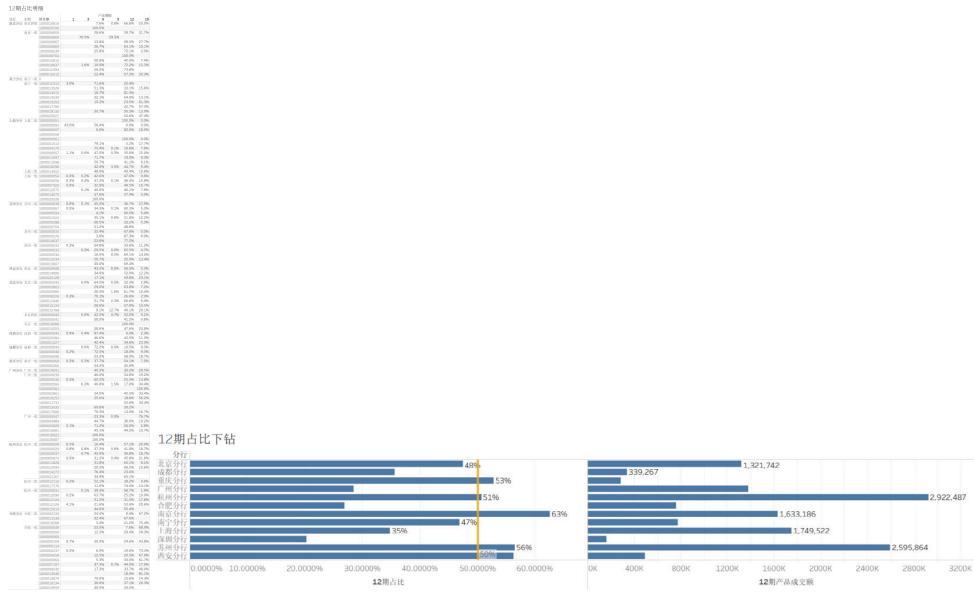


Chart Title: Figure 4: 12-Month Product Contribution by Branch

Key Insights:

- Product Strategy:** The **12-month product** is the most profitable for the company.
- Regional Variance:**
 - Nanjing (63%) and Suzhou (56%) have successfully pushed long-term products.

- Shenzhen (21%) relies heavily on short-term products. While their sales volume is high, the profit margin might be lower due to the product mix.
 - **Action:** Shenzhen branch should introduce incentives to upsell 12-month products to maximize profitability.
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6. Strategic Recommendations (策略总结)

Based on the data insights, the following strategic actions are proposed to the management team:

1. **Restructure Incentives for Shanghai Branch:**
 - a. **Issue:** High acquisition but low revenue (low quality).
 - b. **Action:** Shift KPI weights from "Raw Registrations" to "Conversion Rate" and "Net Invested Capital". Stop rewarding "vanity metrics" to filter out low-quality traffic.
2. **Scale Best Practices (Nanjing & Shenzhen):**
 - a. **Nanjing Model:** Standardize Nanjing's sales scripts for **upselling 12-month products** and train other branches to improve overall profit margins.
 - b. **Shenzhen Model:** Analyze Shenzhen's channels for acquiring **High Net Worth Individuals (HNWI)** and replicate these channels in other Tier-1 cities (e.g., Beijing, Shanghai).
3. **Implement Granular Monitoring:**
 - a. **Issue:** Sudden traffic drop in Week 3.
 - b. **Action:** Establish a **Daily Stand-up Review** mechanism for underperforming teams. Monitor "Leads-to-Registration" conversion daily to identify and resolve bottlenecks immediately during the month-end sprint.