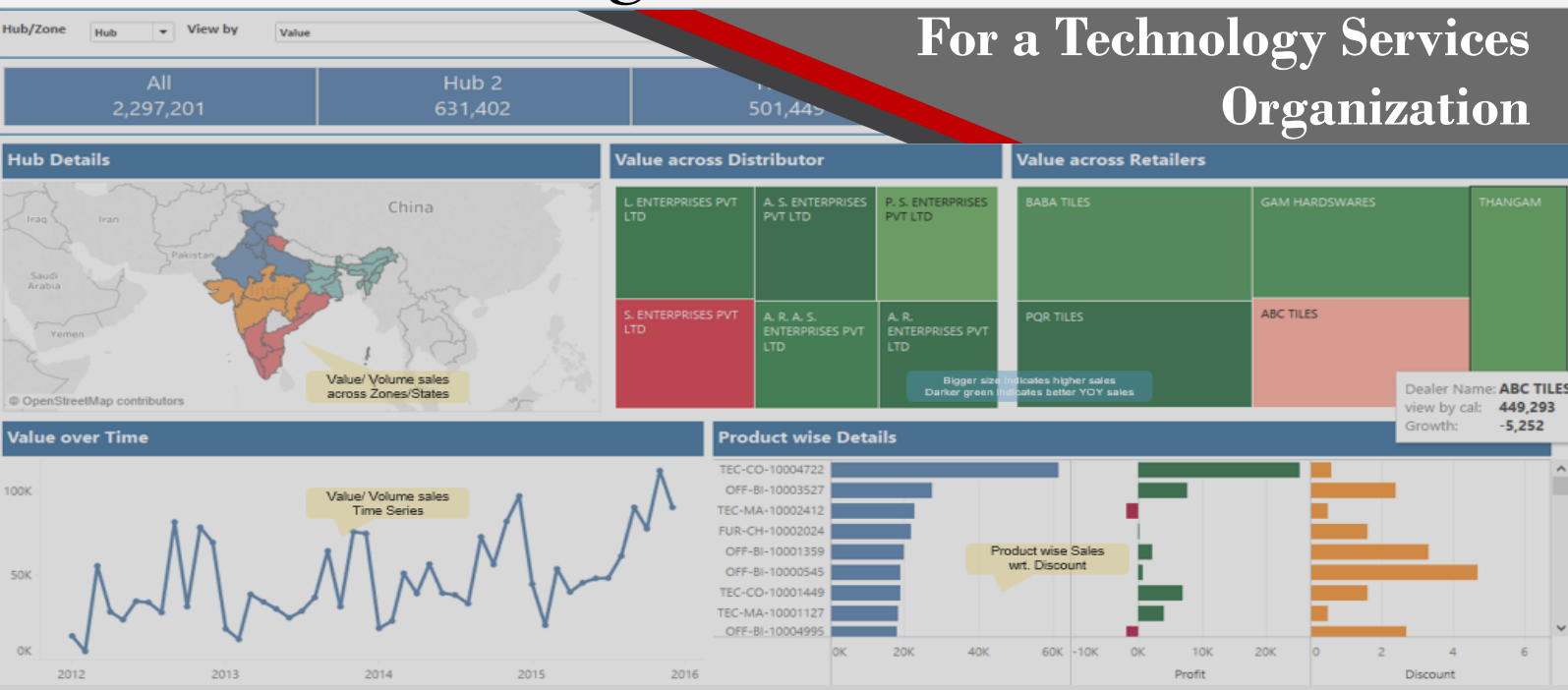


## Using 360° Visualization & Intelligent Dashboarding to drive Sales Excellence

### For a Technology Services Organization



### Client Situation



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- The client is a > USD 1.5 bn revenue B2B technology services firm. The company felt the need to build an intelligent sales analytics dashboard to monitor the sales pipeline and team performance closely, through a drill down of crucial metrics & KPIs. The senior management was looking for a 360° view of Sales, in order to make the right interventions to ensure that the aggressive targets are met.

- Key Challenges in the client's existing environment:



**1** Lack of a consolidated view of the Sales pipeline, leading to inaccuracies in Sales Forecasting



**2** Lack of a comprehensive sales team performance monitoring system



**3** Limitations in Insights generated from the dashboards generated through the leads management tool



**4** Sales Decisions being taken on an adhoc basis, without closely observing long term trends and seasonalities

- The Client engaged Avalon Consulting to develop an analytics framework and implement automated Business Intelligence dashboards to help address these challenges

- We initiated our intervention through **workshops with key client stakeholders**, to define key metrics and KPIs in the lead to order cycle. There was a lack of a unified interface to track all the KPIs since the client teams were using multiple tools to manage different kinds of data.
- Avalon developed an **analytics framework** to unify all key KPIs under a consolidated dashboard view
- Data was aggregated from multiple sources, and a detailed analysis was done to **identify key attributes of interest** for the client
- Exploratory data analysis was done using MS Power BI and R(analytical tools) - which included **data cleaning, outlier treatment, and data transformation** - to identify insights affecting sales
- Extensive data analysis (comparison of forecasts vs. actual sales) was **done across product ranges and customer segments** for better visibility of the sales forecast
- **Dynamic dashboards** were created with different views for team members, mid-management and senior management. Special templates were designed which involved **complex data modelling** and coding to automate the processes to the extent possible
- The **dynamic dashboards** designed also doubled as a systematic record of data regarding sales forecasting and other related activities – which could be useful for future analysis and to derive **strategic initiatives**. Earlier, such dashboards were not maintained at all or informally by certain teams

Throughout the execution of the project, Avalon worked closely with a diverse set of internal and external stakeholders across different hierarchies to design and setup the sales performance & analytics dashboard.

## Impact of our Interventions



***Comprehensive 360° view of Sales Pipeline & Forecast***



***Tracking of individual and sales team performance on a real-time basis***



***Enhanced visibility of key focus areas for the senior management***



***10% increase in bookings\* &  
12% increase in win ratios\****

*\* YoY growth from 2020 to 2021*

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