

## Strategic management assignment

Imagine that you are working as a Strategy Analyst: you analyze sales data on a day-to-day basis, and you are specialized on units being sold and installed, meetings with customers (bookings), and individual performance. Just after you have finished your lunch and coffee you receive a list of questions from your Manager, with a note that you should not spend more than an afternoon on it, just get as much insights as you can in four working hours. The next morning you will have to present your findings to the Management Team in a comprehensible manner. **The Management Team is comfortable consuming analyses in both PowerPoint, through Power BI or directly from an Excel, and they prefer to understand the “big picture” first but are also comfortable and keen to dig into the details of any supporting analysis.**

To answer the questions, you will use raw data related to units installed (raw\_inst.xlsx) and customer meetings (raw\_bookings.xlsx). You also have access to salespersons' information and branch data (raw\_salespersons.xlsx, raw\_branches.xlsx, raw\_budgets.xlsx). You also know the following: a salesperson is having a good productivity if their installation per meeting ratio is above 35% in a month, however, for salespersons who started in 2020 this ratio must be over 30%. Additionally, a salesperson is performing if they had at least 12 installation in a month.

The management team is interested in the following questions:

1. How many units were installed between 2020 August and October?
2. Which was the best performing branch in the given period?
3. In which month did the company reach their target?
4. Which branches reached their targets in between August and October?
5. How was our conversion rate in between August and October? (conversion rate: bookings that resulted in a sale, using the original booking date as a base)
6. Who had the best conversion rate over the whole period?
7. If a branch reaches its installation target and conversion rate target, they get a bonus. Which branches should receive a bonus?
8. Who was our best performing salesperson between July and October?
9. Who was our best performing newbie (started in 2020) in the given period?
10. Is there anyone who stands out with their performance among the salespeople?
11. If somebody reaches their installation target, they receive a bonus of 5000 kr, if they reach their productivity target, they receive a bonus of 3000 kr. If somebody reaches both, they get a bonus of 10000 kr. How much bonus was paid per month per branch between August and October?
12. On which weekend did we have the highest number of bookings?
13. Is there any obvious Trend Changes during the whole period?
14. What do you think could be a realistic forecast for the number of installations in November? As input, you know that the number of bookings per branch are expected to be the same as in October and in addition all salespersons will work full time in November (i.e. 8 working hours). Clearly explain other assumptions that you have based the forecast on.

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### **Some clarification about data:**

*Installations and Booking tables are containing unique ID-s for each row – that's how an installation or a meeting can be identified.*

*Salesperson column identifies who was responsible for either a meeting or an installation.*