

Enhancing Sales Team Performance and Analytics Capabilities with Tableau Reporting



Case Study



Business Objective

- The client required the TekLink Team to consolidate or replace existing reports
- The client also looked to enhance the three important sales pillars; these are:
 - Performance Assessment that can give access to the data and tools to understand their employees' performance
 - Coaching the managers on a constant basis who can in-turn coach their employees in a consistent, data-driven and goal-oriented manner
 - Help the managers plan future sales and set accurate goals/targets effectively

Client

- The client is one of the largest food companies and a leading foodservice distributor

Industry

- Food Service

Function

- Sales and CRM, Sales Analytics

Technology

- Snowflake



The Solution

The solution entails developing Tableau dashboards that illustrate:

- Scorecards, which help to measure the progress of the Territory Managers and District Sales Managers for the goals set for a fiscal year; the scoreboards consider more than twenty metrics to determine the score.
- Further, the dashboards help in ranking the Territory Managers and District Sales Managers. The ranking ensures an easy comparison between the tenure cohort (Fellow Employees at the same level of seniority/markets and across the company).
- Two aggregate metrics were developed using the Snowflake data warehouse, which also helps in scoring and ranking based on the parameters.
- Further, it aids in cluster analysis to determine natural thresholds for various parameters such as goals, and for segmentation of individuals by tenure, market, route size, and many others.



Outcomes and Benefits

- With the new dashboards, the managers can assess their team's sales performance more objectively and holistically.
- The managers can also decide on providing training or coaching to their team members who are not at par in some of the metrics considered for evaluation.
- Consolidation of other existing reports results in time savings, process improvements, and the overall streamlining of operations.
- It further enhances the business reporting and analytical capabilities: performance assessments, consistent coaching, and effective planning.
- It allows the sellers to plan their workstreams more effectively.
- There is now only one centralized source of data, which yields a standardized format for the reports with the standardized metrics.