QBurst

TOP MANAGEMENT DASHBOARD

Clear All Filters   Last Refresh : Dec 31, 2019 07

Sales Target	Actual	Variance	Hit Rate
320 M	200 M	120 M	11.9%

Budget Vs Actual   Tender Register

CM1 %	CM1 %	CM1 %	CM4 %
15%	8.9%	6.1%	7.2%

Order Intake   Sales by Locations

Sal
Pers
Activ

How our Sales Person Spending Time?
● Call ● Visits ● Meeting ● Email ● Other

Sajith	47.06%	27.45%	19.61%
Arun	28.57%	42.86%	
Anees	34.72%	27.08%	27.78%
Kiran	55.56%	22.22%	
Georgy	19.60%	35.18%	
Sajeesh	36.84%	21.05%	21.05%
Fahad	30.38%	22.15%	22.15%
Kumar	21.62%	37.84%	27.03%

0%   50%   100%

What is our Sales Person Visits vs Meetings Status?
● Visits ● Meeting

Arun 90 / 10
Sajith 70
Fahad 48 / 20
Anees 39 / 40
Georgy 35 / 20
Sajeesh 20 / 10
Kiran 10 / 20
Kumar 40

0   20   40   60   80   100

Where our Sales Person Spending more?
● Call ● Email ● Meeting ● Other ● Visits

Visits 23.73%   Call 29.
Other 16.09%
Meeting 12.35%   Email 18

Our Sales Person Open Tenders?

Project Name	Est. Value	Account
Project 1	20K	ABX Company
New Bahrain	300K	ABX Company
Plant Furnishing	50K	B2C Company
Test project 18 dec	10K	ABX Company

Power BI Implementation
Delivering actionable insights for contracting, forecasting, and resource-allocation

Project Overview

The project involved developing highly interactive dashboards in Power BI for various levels of management. This included capturing data from the CRM system and transforming it into rich interactive visuals while prioritizing data security. Intuitive visualizations were created for top management and salespersons by integrating data sources from various systems. By providing actionable insights, the solution helped the client make better contracting, forecasting, and resource-allocation decisions across their locations in the Middle East.

Client Profile

Based in the Middle East, the client provides technical industrial services on build and maintenance projects across industries such as construction, oil, gas, pharmaceuticals, mining and marine.

Highlights

- Data transformation and modeling to suit reporting requirements
- Transformed data from around 20 tables and built the data model in Power BI
- Created calculations and measures using DAX Queries
- Power Queries to render data in required format while loading
- Developed visually interactive reports
- Developed drill-down reports for the KPI dashboard
- Developed role-based dashboards as per framework given
- Power BI gateway configuration, data scheduling, report access/restriction
- Maintaining data security and data refresh in reports

Key Features

- ★ Summarized cards for current target, actual, variance, and hit rate
- ★ View salesperson's activities
- ★ Tender Register displays orders per client with estimated value/profit
- ★ Sales budget versus actual with variance; sales by location
- ★ Order intake by service (for example, insulation, scaffolding, painting)
- ★ Order intake forecast and estimator
- ★ Filter by country, salesperson, and tender type

Technologies

- ❏ Microsoft Power BI
- ❏ Data Analysis Expressions (DAX) Queries
- ❏ CRM

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