Excel case – Sales Commissions at Snake Corp.

Introduction

Snake Corp. sells appointment management software for veterinarians.

Therefore, its sales reps close new business contracts every month, or upsell existing accounts. Four types of accounts are targeted: offices, clinics, specialized centers and hospital centers.

Each month, each salesperson has a target of monthly recurring revenue (MRR). Depending on their target achievement, they earn a bonus according to the following table:

Target achievement	Bonus
0 → 50%	0 €
50% → 70%	1 000 €
70% → 100%	1 800 €
+100%	2 500 €

Boosted MRR

As some types of accounts are of higher priority for the company, the amount of MRR taken into account to calculate the achievement of the objective is "boosted" according to the type: each euro on specialized centers is multiplied by 1.2, and by 1.5 for hospital centers.

🎯 **The goal of this business case is to calculate the bonus of your Snake Corp. sales reps, and to run some analysis on it.**

Instructions

☝️ You can choose to use Microsoft Excel or GoogleSheet.
The evaluation of your work will take into account your use of formulas, the global approach and clarity (more than the results themselves).

You have at your disposal a .xlsx file with 4 tabs which are extracts from the company's CRM:

Serpentin exercice Qobra.xlsx

- Deals: id_deal, name, close date, id_salesrep, amount, id_account, type, status
- Sales Reps: id_salesrep, name, email, team, country, start date
- Targets: email_salesrep, month, value
- Accounts: id_account, name, sector
- ▼ NB: in tab "accounts", here is the FR <> EN translation for column C:

  Cabinet = office

  Clinique = clinic

  Centre hospitalier = hospital center

  Centre spŽcialisŽ = specialized center

1. Describe the type of data in each column (as it would be in a CRM or a database).

2. Enrich the Deals table with the name of the Sales Rep and the sector of the account.

3. Calculate for each deal, the "boosted" amount to be used for commission calculation.

4. In the Sales Reps table, calculate for each Sales the total closed won MRR on new business deals, only those in February (a tip here). Calculate the non-boosted total and the boosted total.

5. In the Sales Reps table, display the February target for each Sales Rep.

6. Calculate the target achievement in February.

7. How would you easily show these same values for January, December...? (without duplicating everything)

8. Calculate the commission amount for each person in February.

9. Improve the presentation at your convenience, and sort the Sales Reps by order of their target achievement.

10. Using a Pivot Table, calculate the total and average commission paid by country and by team, and the average target achievement.

11. Snake Corp. would like to better reward its top performers, without increasing its total commissions paid. What do you recommend?