

Minnesota Interstate Traffic Volume

An in-depth analysis of traffic patterns
on our interstate highways



Traffic congestion continues to grow



... with no end in sight

Analyzing the data in 3 distinct charts



Monthly Volumes

Viewing the monthly traffic patterns allows us to find any potential trends by month.



Weather

Weather can have an impact on many things, including traffic.



Holiday Travel

Our roads may see more travelers (including out of state) than expected.

BI tool used:  **Tableau**

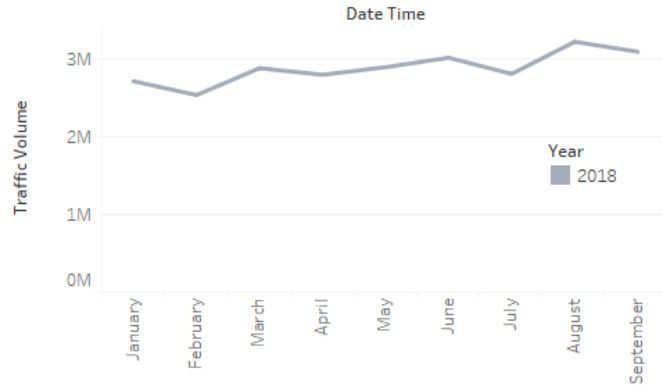
Minnesota Interstate Traffic Volume

[Download PDF](#)

Timescale

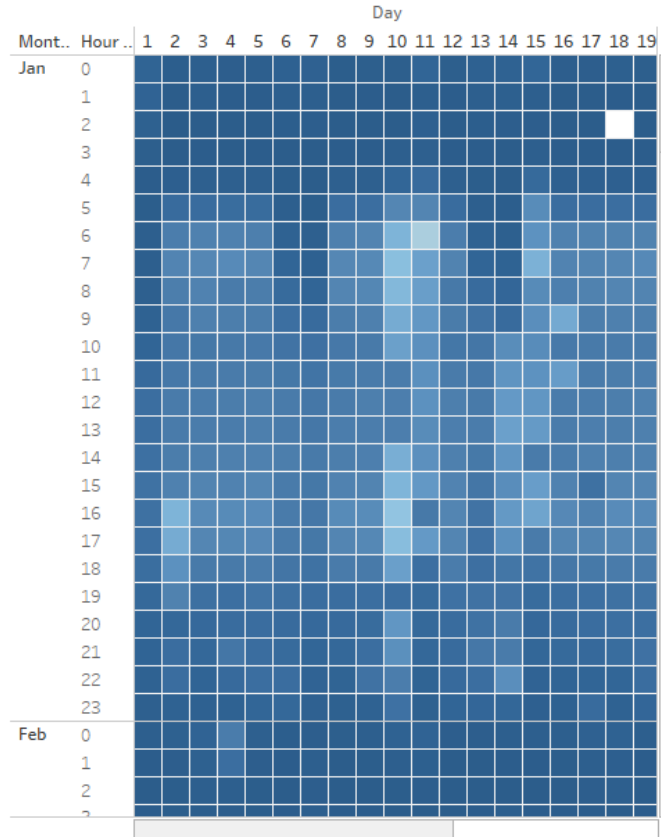
1/1/2018 12:00:00 AM to ..

Traffic Volumes: Month per Year

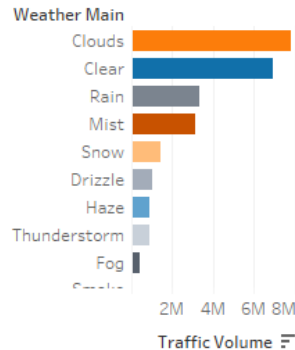


Traffic Volumes: Hours of the Day

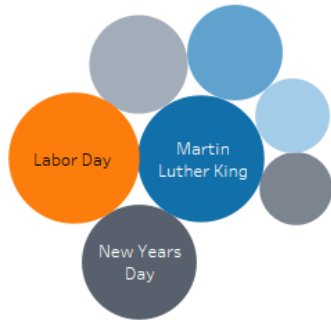
Day of the month with hourly traffic breakdown



Traffic Volumes: Weather Type



Highest Traffic on National Holidays in the United States



Monthly traffic volumes

August - Highest volume, possible end of summer seasonal traffic

February - Lowest volume, best possible month for construction changes

April - Significant decrease in 2018

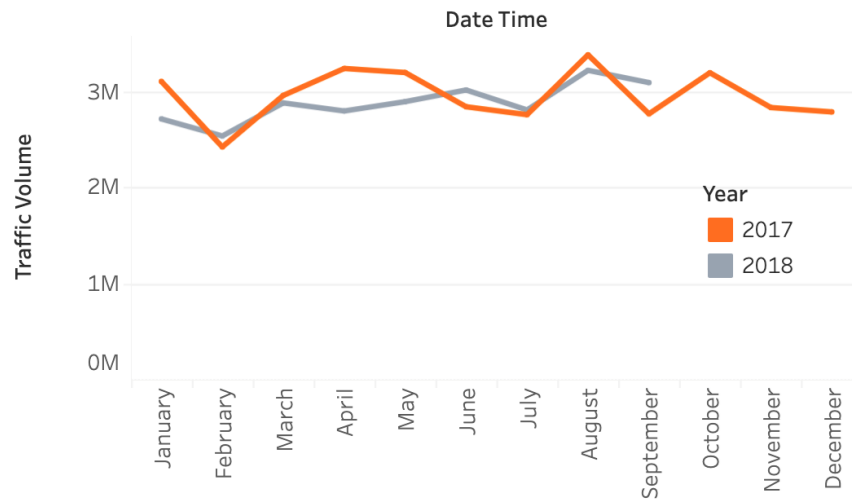
Fairly consistent/predictable patterns

Minnesota Interstate Traffic Volume

Timescale

Last 7 years

Traffic Volumes: Month per Year



What role does weather play?

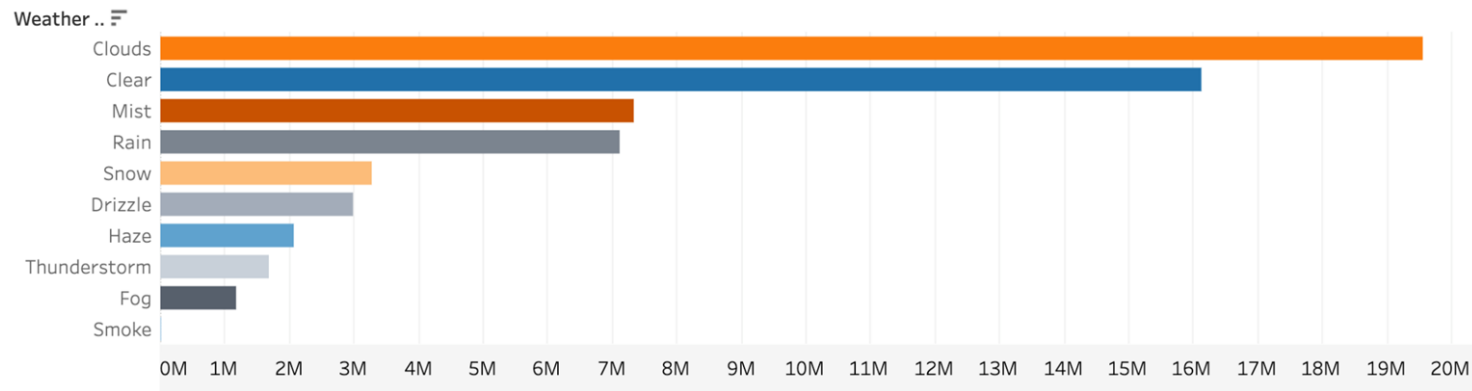
Clear/cloudy conditions result in the highest traffic volume.

Low-visibility conditions result in the lowest traffic volume.

Precipitation has a significant impact on traffic volume, though a surprising number of motorists continue to drive in rain.

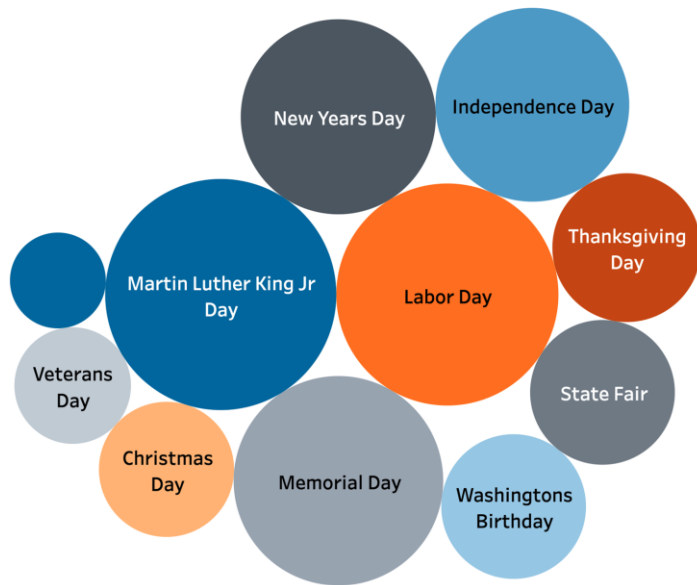
What can we do to alleviate traffic issues on rainy days?

Traffic Volumes: Weather Type



Holiday Travel

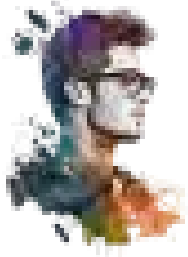
Highest Traffic on National Holidays in the United States



August - State fair starting in August

January - High traffic on New Years and Martin Luther King Jr. Day contribute to most of January's total.

Most holidays have little impact on total traffic volume.



Cyclone Enterprise - BI Solution

My Role: Business Intelligence Analyst

BI Tools: Microsoft Power BI

Project Description: Transform raw data into actionable insights by creating reports and dashboards. These dashboards and Reports help the Management Team track the Key Performance Indicators (KPIs) Compare Regional Performance Analyze Product-level Trends Identify High-Value Customers The ultimate challenge was to enable data-driven decision-making, improving business strategies and operational efficiency.



Project Solution Flow

- 1. Data Preparation (ETL):** Extracting, transforming, and loading data using Power Query. This included shaping data with data connectors, choosing appropriate storage modes, profiling, and performing table transformations to ensure the data was ready for analysis.
- 2. Data Modeling:** Develop a relational data model using techniques such as cardinality, normalization, filter flow, and star schemas. This structured approach facilitated efficient data retrieval and analysis.
- 3. Data Analysis:** Configuring the data model using calculated columns and measures with DAX (Data Analysis Expressions). I implement practically filter functions, iterators, and time intelligence patterns to derive meaningful insights from the data.
- 4. Visualization:** Designed and developed professional-quality reports and dashboards. These visualizations included KPIs, regional performance metrics, product-level trends, and insights on high-value customers. I enhanced interactivity through bookmarks, slicer panels, custom tooltips, and report navigation features.
- 5. Optimization:** Utilized Power BI's native and external optimization tools, including the performance analyzer and optimization presets, to ensure the reports and dashboards were efficient and responsive.



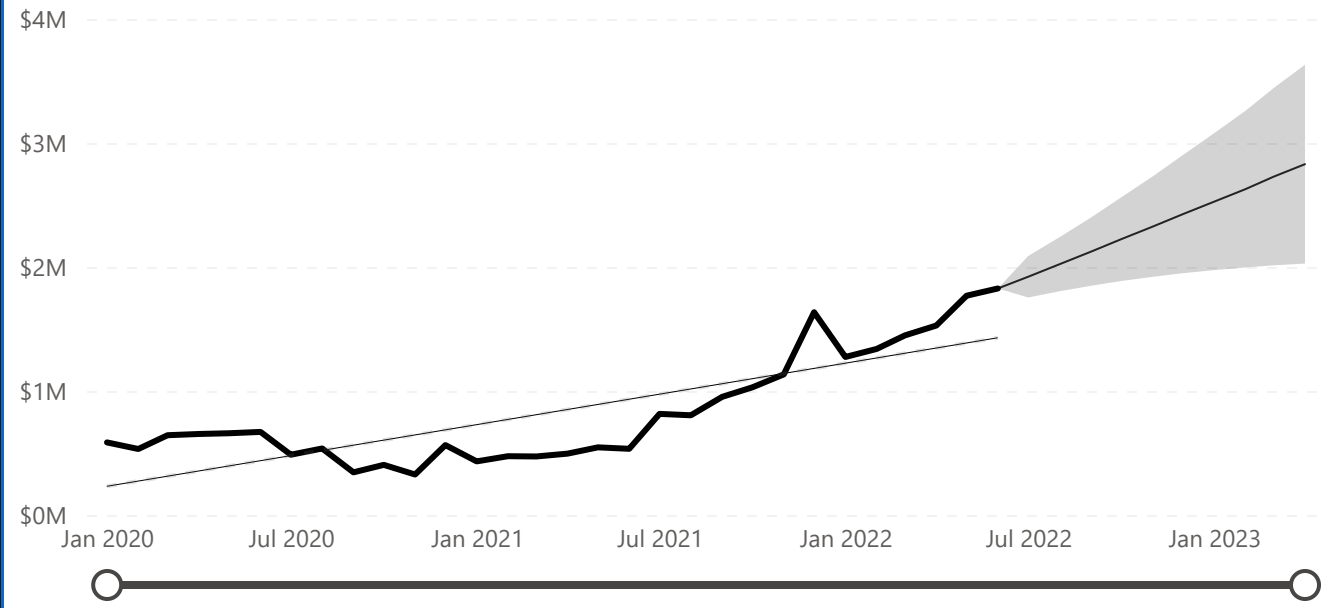
\$24.9M
REVENUE

\$10.5M
PROFIT

25.2K
ORDERS

2.2%
RETURN RATE

Revenue Trending



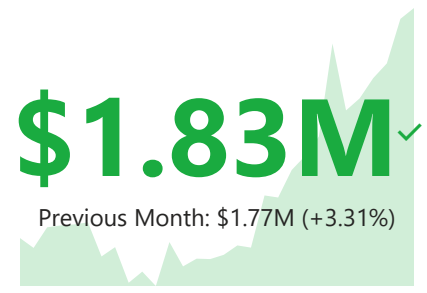
Orders by Category



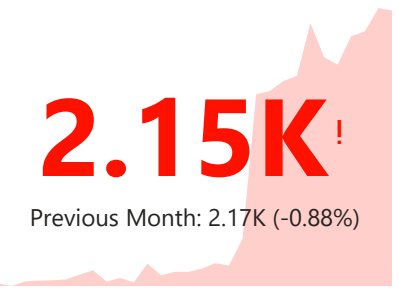
Top 10 Products

	Orders	Revenue	Return %
Water Bottle - 30 oz.	3983	\$39,755	1.95%
Patch Kit/8 Patches	2952	\$13,506	1.61%
Mountain Tire Tube	2846	\$28,333	1.64%
Road Tire Tube	2173	\$17,265	1.55%
Sport-100 Helmet, Red	2099	\$73,444	3.33%
AWC Logo Cap	2062	\$35,882	1.11%
Sport-100 Helmet, Blue	1995	\$67,120	3.31%
Fender Set - Mountain	1975	\$87,041	1.36%
Sport-100 Helmet, Black	1940	\$65,270	2.68%
Mountain Bottle Cage	1896	\$38,062	2.02%

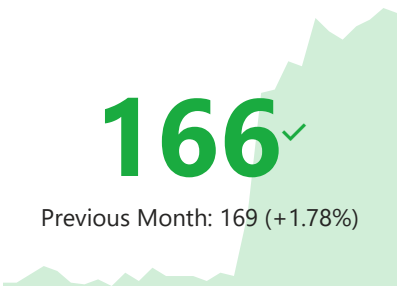
Monthly Revenue



Monthly Order



Monthly Return



Most Order Product Type

Tires and Tubes

Most Returned Product Type

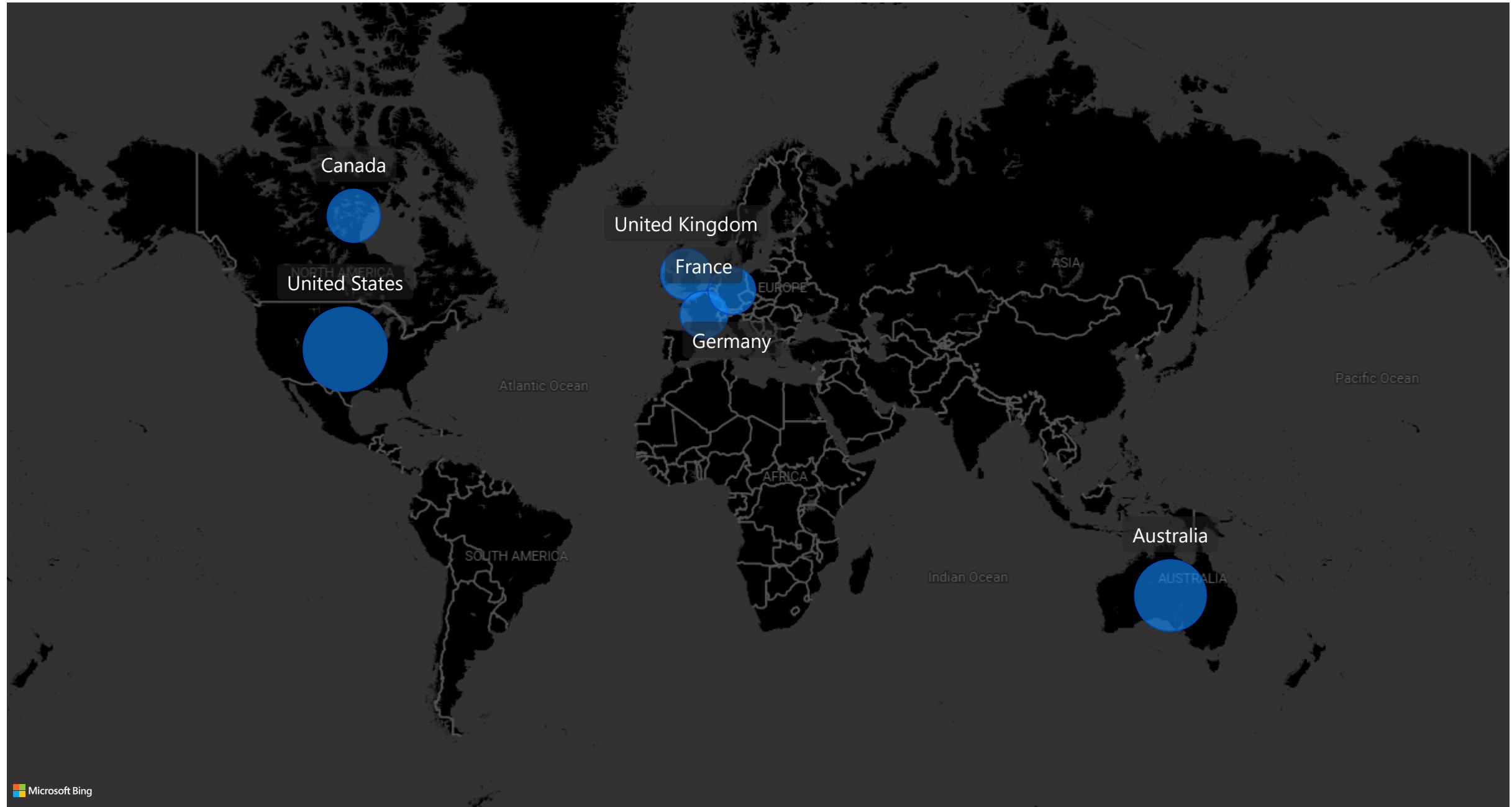
Shorts

Select all

Europe

North America

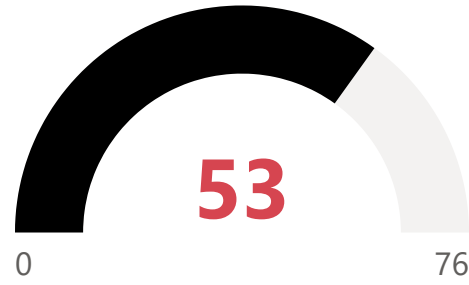
Pacific



Selected Product

Patch Kit/8
Patches

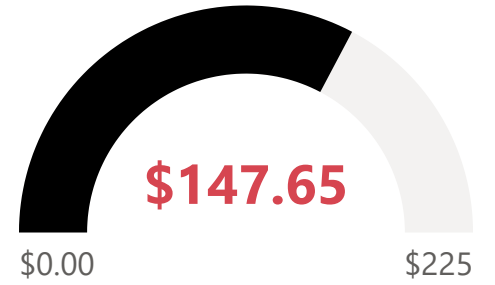
Monthly Orders vs Target



Monthly Revenue vs Target



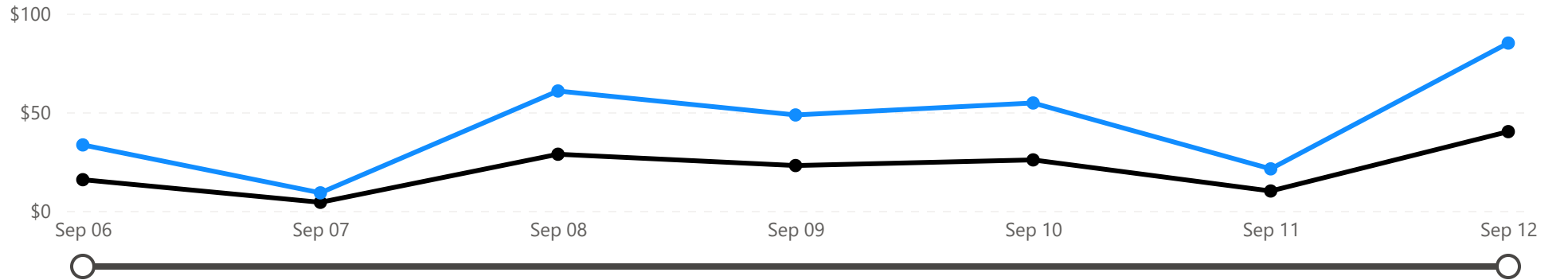
Monthly Profit vs Target



Price Adjustment %

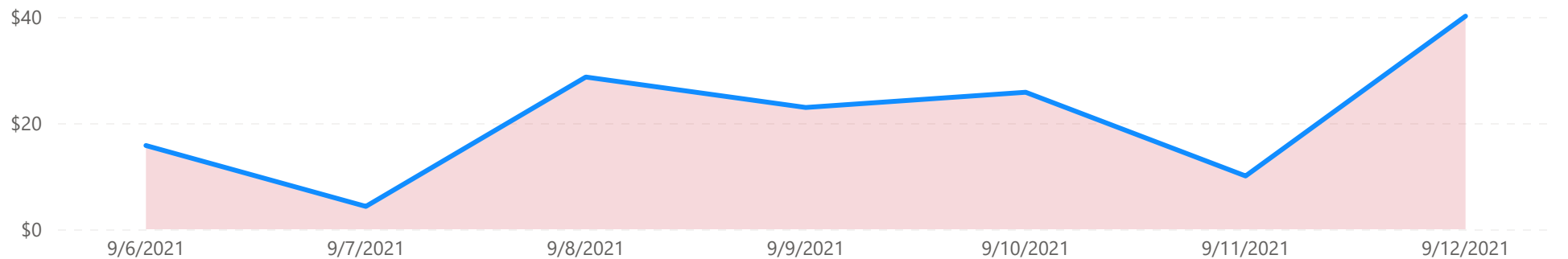
0.70

● Total Profit ● Adjusted Profit



Product Matrix Selection

- Orders
- Revenue
- Profit
- Returns
- Return %



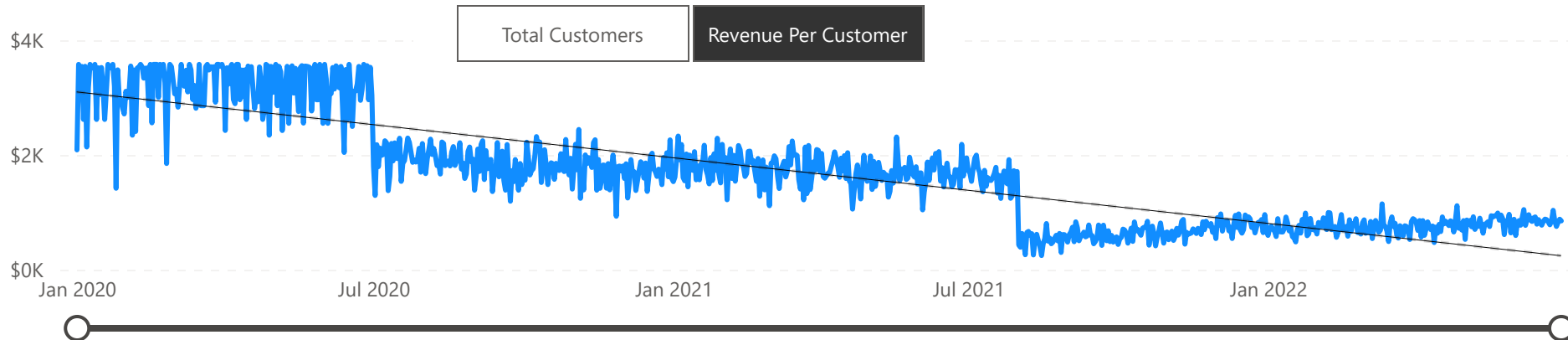


17.4K

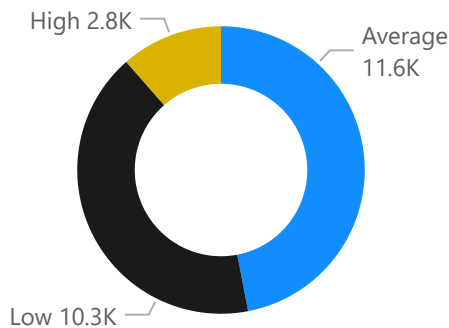
UNIQUE CUSTOMERS

\$1,431

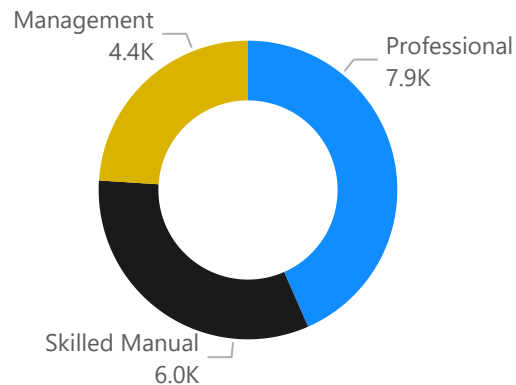
Revenue Per Customer



Orders by Income Level



Orders by Occupation level



Top 100 Customers

CustomerKey	Full Name	Total Orders	Total Revenue
11433	Mr. Maurice Shan	6	\$12,408
11439	Mrs. Janet Munoz	6	\$12,015
11241	Mrs. Lisa Cai	7	\$11,330
11417	Mrs. Lacey Zheng	7	\$11,086
11420	Mr. Jordan Turner	7	\$11,022
11242	Mr. Larry Munoz	7	\$10,852
13263	Mrs. Kate Anand	4	\$10,437
12655	Mr. Larry Vazquez	4	\$10,395
11425	Mrs. Ariana Gray	6	\$10,391
12631	Mr. Clarence Gao	4	\$10,332
12650	Mr. Aaron Wright	4	\$10,329
13405	Mr. Ethan Bryant	4	\$10,309
11429	Mr. Marco Lopez	6	\$10,290
12632	Mrs. Bonnie Nath	4	\$10,283
11245	Mr. Ricky Vazquez	4	\$10,166
11237	Mr. Clarence Anand	4	\$10,065
11428	Mrs. Deanna Perez	4	\$9,762
11427	Mrs. Desiree Dominguez	4	\$9,718
11423	Mrs. Jasmine Stewart	4	\$9,717
11412	Mrs. Sydney Bryant	4	\$9,707
11431	Mr. Bryant Garcia	4	\$9,687
Total		1272	\$615,329

Year

2020

2022

Top Customer by Revenue

Mr. Dalton Perez

Orders

130

Revenue

\$8,304



Average Customer in Skilled Manual Revenue is \$1740



Turn Vision into Reality



Strategic Business Analyst & Business Intelligence

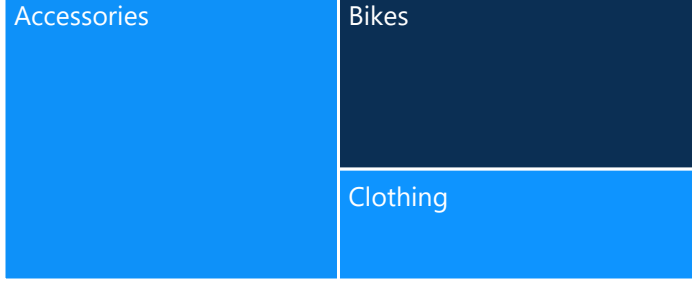
1/1/2016



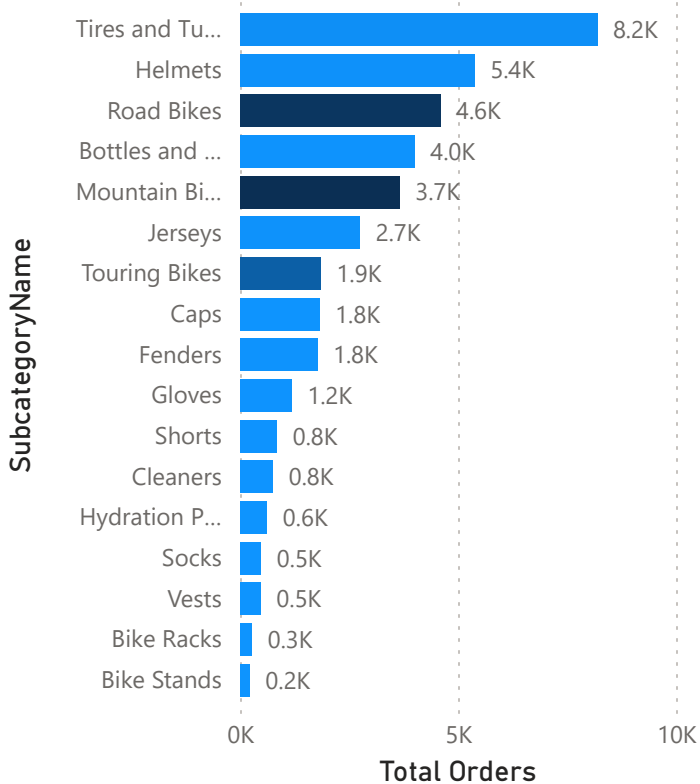
5/30/2017



Total Orders by Category



Total Orders by Subcategory



ProductName	Total Orders	Return Rate
All-Purpose Bike Stand	220	3.64%
AWC Logo Cap	1,819	1.09%
Bike Wash - Dissolver	753	1.53%
Classic Vest, L	161	2.48%
Classic Vest, M	166	3.61%
Classic Vest, S	145	4.83%
Fender Set - Mountain	1,768	1.30%
Half-Finger Gloves, L	362	2.03%
Half-Finger Gloves, M	421	1.67%
Half-Finger Gloves, S	397	1.42%
Hitch Rack - 4-Bike	271	2.95%
HL Mountain Tire	1,168	3.68%
HL Road Tire	737	3.66%
Hydration Pack - 70 oz.	619	3.55%
LL Mountain Tire	719	2.40%
LL Road Tire	868	2.25%
Long-Sleeve Logo Jersey, L	381	3.67%
Long-Sleeve Logo Jersey, M	357	3.92%
Long-Sleeve Logo Jersey, S	344	3.49%
Long-Sleeve Logo Jersey, XL	345	2.61%
ML Mountain Tire	964	1.30%
ML Road Tire	761	1.52%
Mountain Bottle Cage	1,686	2.07%
Mountain Tire Tube	2,560	1.64%
Mountain-200 Black, 38	474	2.95%
Total	20,309	2.15%

[View Product Details](#)



Monthly Revenue



Monthly Orders



Monthly Return



Top Products (Order)

Water Bottle - 30 oz.

Top Products (Profit)

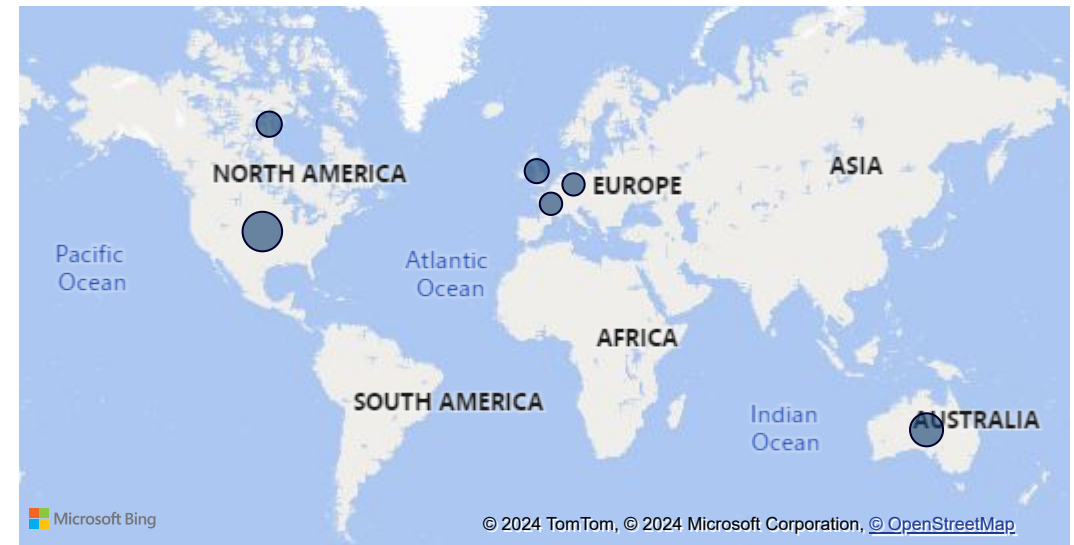
Mountain-200 Black, 46

Select all

Europe

North America

Pacific





Turn Vision into Reality

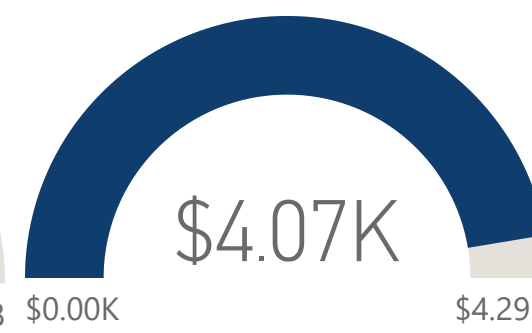


Water Bottle - 30 oz.

Current Month Orders vs Target



Current Month Revenue vs Target



Current Month Orders VS Target



Price Adjustment (%)

0.10

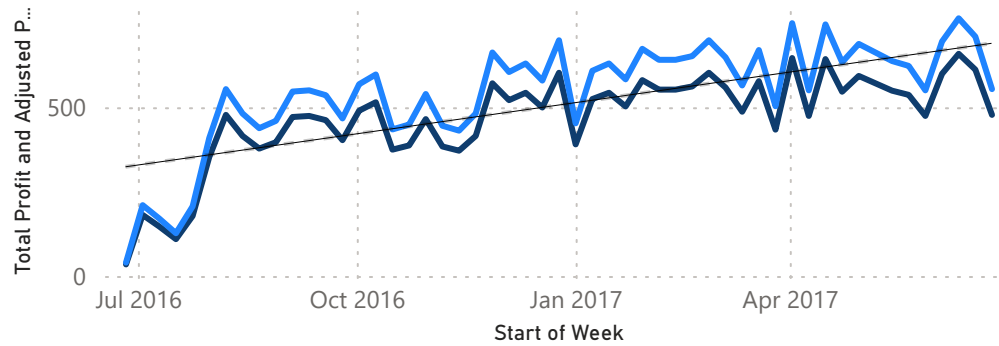


\$4.99
Avg Retail Price

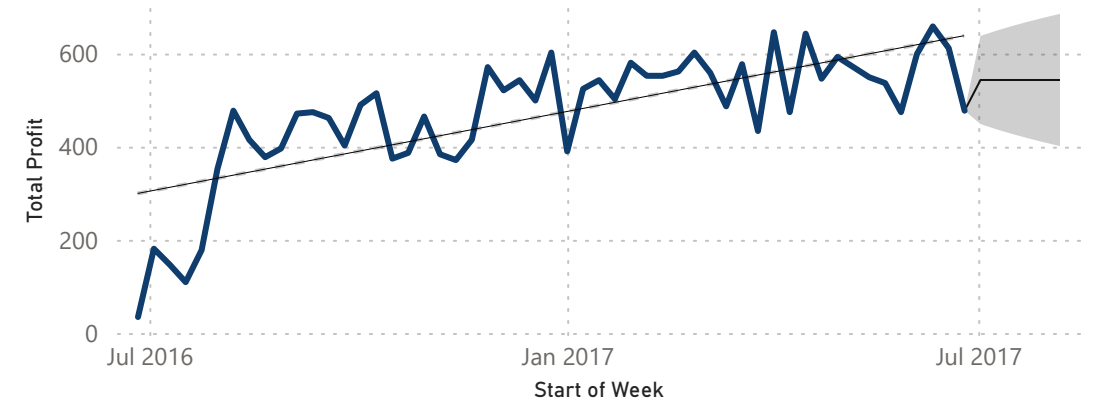
\$5.49
Adjusted Price

Weekly Profit

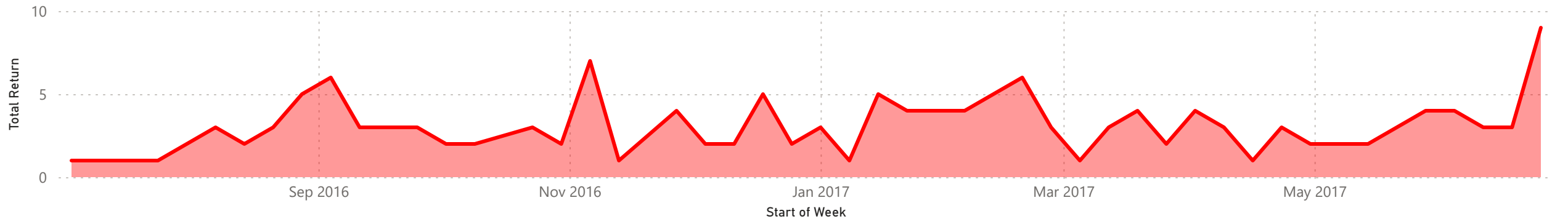
● Total Profit ● Adjusted Profit



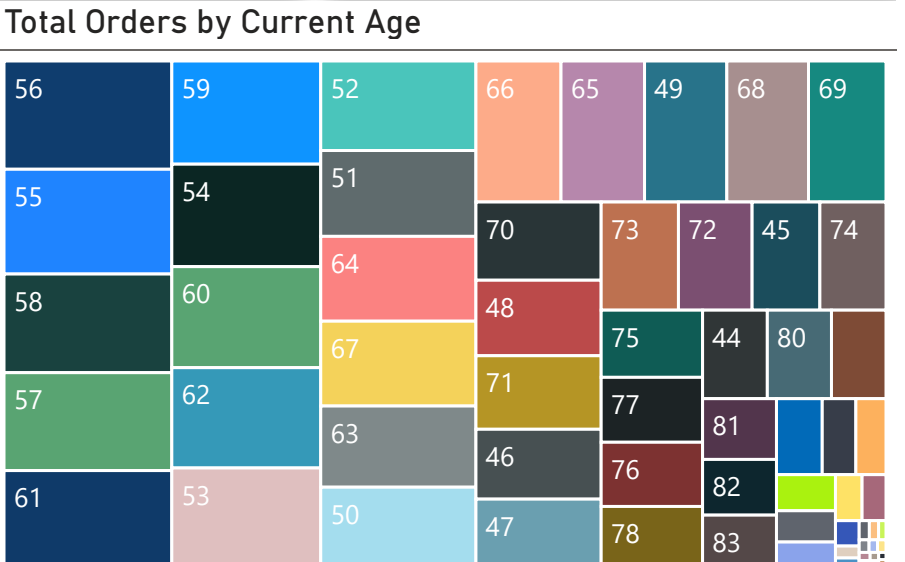
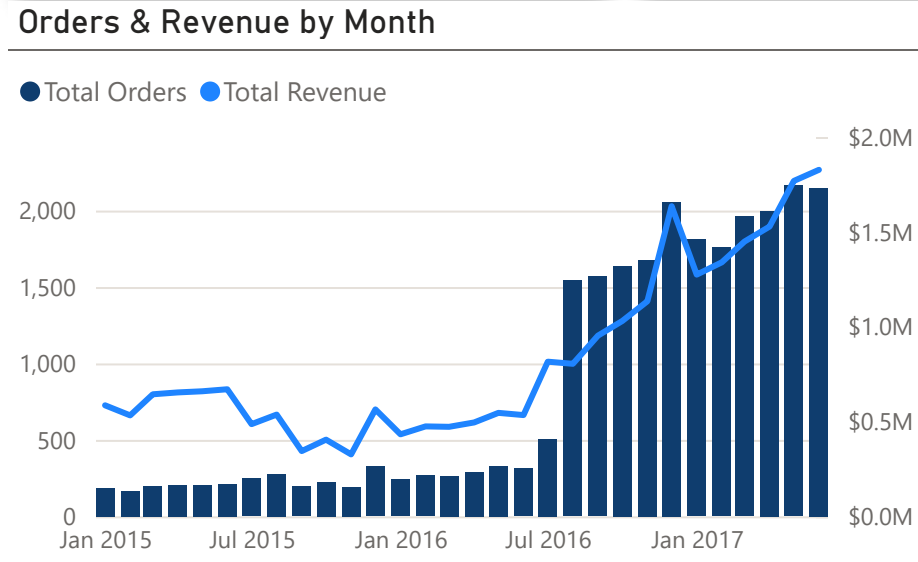
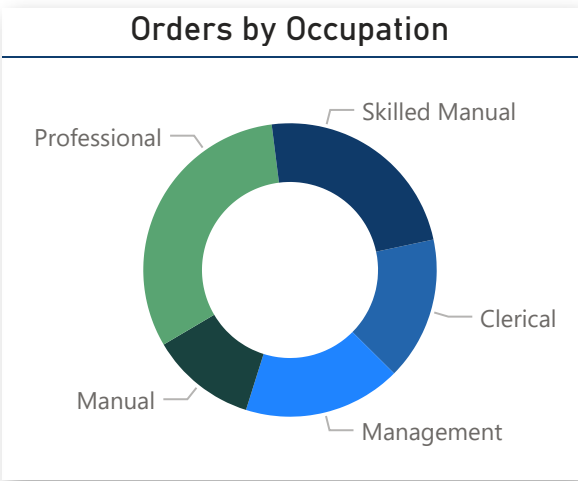
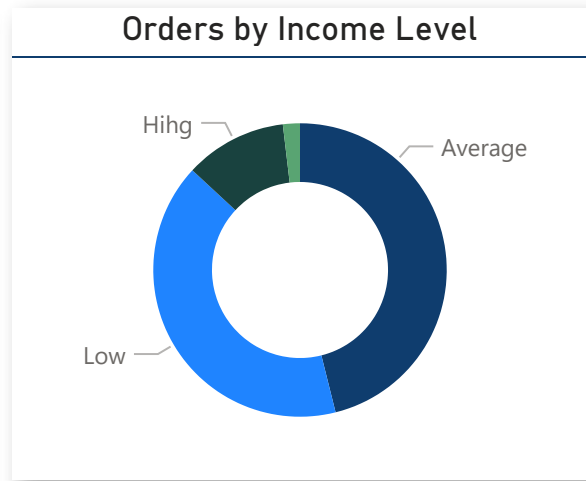
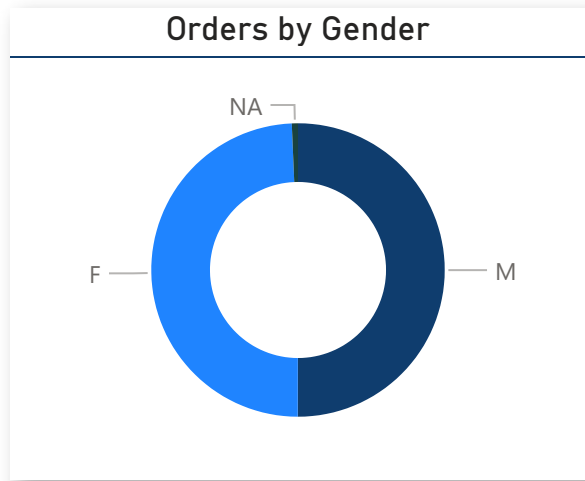
Weekly Profit



Weekly Return Volum



FullName	Total Orders	Total Revenue
Mr. Maurice Shan	6	\$12,407.95
Mrs. Janet Munoz	6	\$12,015.39
Mrs. Lisa Cai	7	\$11,330.44
Mrs. Lacey Zheng	7	\$11,085.74
Mr. Jordan Turner	7	\$11,022.38
Mr. Franklin Xu	6	\$10,863.44
Mr. Larry Munoz	7	\$10,852.04
Mrs. Kate Anand	4	\$10,436.51
Mr. Larry Vazquez	4	\$10,394.98
Mrs. Ariana Gray	6	\$10,391.42
Mr. Clarence Gao	4	\$10,331.73
Mr. Aaron Wright	4	\$10,329.22
Mr. Ethan Bryant	4	\$10,308.52
Mr. Marco Lopez	6	\$10,289.68
Mrs. Bonnie Nath	4	\$10,282.91
Mr. Ricky Vazquez	4	\$10,165.92
Mr. Clarence Anand	4	\$10,065.01
Mrs. Deanna Perez	4	\$9,761.59
Mrs. Desiree Dominguez	4	\$9,717.63
Mrs. Jasmine Stewart	4	\$9,716.98
Mrs. Sydney Bryant	4	\$9,706.89
Mr. Bryant Garcia	4	\$9,687.36
Mrs. Cindy Patel	4	\$9,668.02
Mrs. Amy Sun	4	\$9,534.15
Mr. Willie Xu	5	\$9,424.97
Mrs. Katrina Tang	4	\$9,302.58
Mrs. Margaret He	4	\$9,266.74
Mrs. Kaitlyn Henderson	4	\$9,258.92
Mrs. Nichole Nara	4	\$9,234.66
Mr. Randall Dominguez	4	\$9,210.36
Mrs. Rosa Hu	4	\$9,201.20
Adriana Gonzalez	4	\$9,195.69
Mrs. Gabriella Collins	4	\$9,184.02
Mrs. Dominique Prasad	6	\$9,180.93
Mrs. Brandi Gill	4	\$9,166.18
Total	25,164	\$24,914,567.18



Top Customer

Mr. Maurice Shan

Customer Orders

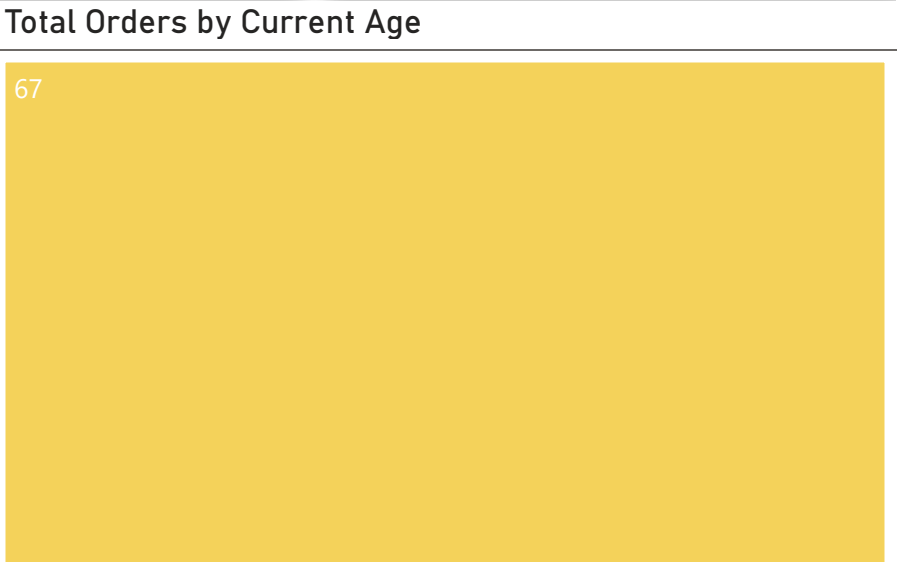
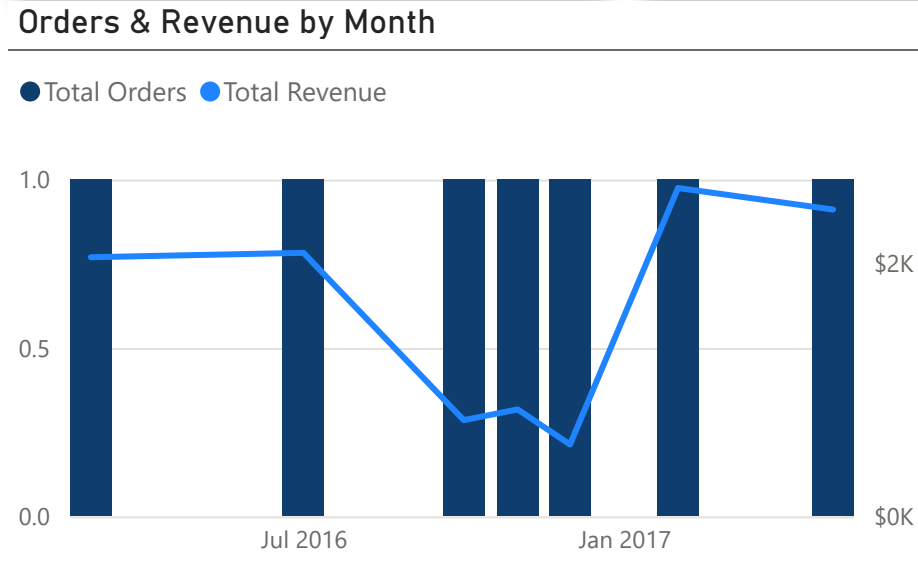
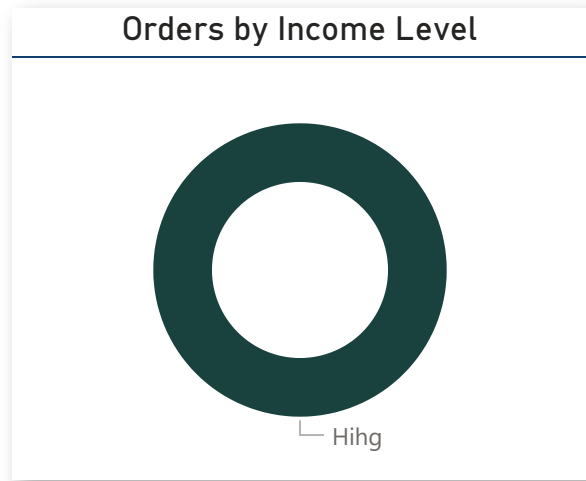
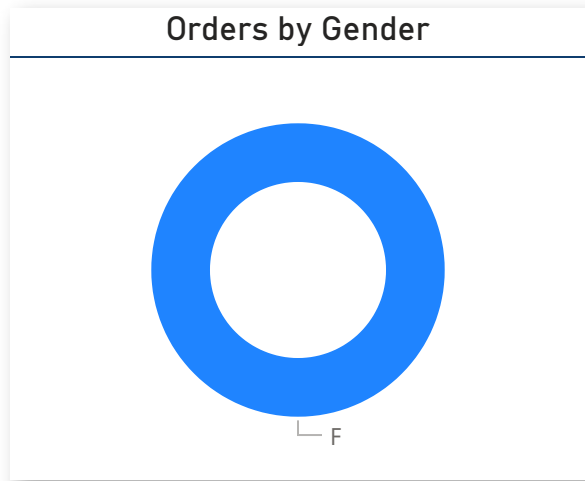
6

Customer Revenue

\$12.41K

Execute Summary →

FullName	Total Orders	Total Revenue
Mr. Maurice Shan	6	\$12,407.95
Mrs. Janet Munoz	6	\$12,015.39
Mrs. Lisa Cai	7	\$11,330.44
Mrs. Lacey Zheng	7	\$11,085.74
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Mrs. Rosa Hu	4	\$9,201.20
Adriana Gonzalez	4	\$9,195.69
Mrs. Gabriella Collins	4	\$9,184.02
Mrs. Dominique Prasad	6	\$9,180.93
Mrs. Brandi Gill	4	\$9,166.18
Total	25,164	\$24,914,567.18



Top Customer

Mrs. Lisa Cai

Customer Orders

7

Customer Revenue

\$11.33K

Execute Summary →

Project: Y61 Auto Services - CRM Implementation

Home About Projects Drones Cars

BA

Turn Vision Into Reality With iamshaaani.

Result-Driven Strategic Business Analyst and Product Designer UI/UX, understand needs, define problem and provide intelligent and SMART workable solutions that meet the needs of customers and stakeholders.

Profile Let Talk

Business Analyst, Product Designer
Hire Me

Portfolio Link:

<https://iamshaaani.co>

Hire me on Upwork:

<https://www.upwork.com/freelancers/~017c54e3d554e32747>

Business Requirement Document 'BRD'

CRM Implementation - Y61 Auto Services

Project name: Y61 Auto Services, CRM Implementation | Prefex CRM

Project manager: Muhammad Zeeshan UI Haq

Date submitted: 20 August 2023

Document status: Draft Proposed Validated Approved

1. Executive summary

Y61 Auto Services plan to implement CRM system to collect, store, manage and interpret data from many business functions to improve the efficiencies across the organization.

2. Project objectives

Improving Customer Relationships, Business Process, Client Interaction Tracking, Sales Automation, Work flow Automation, Database Management, Marketing and Campaign Management, Business Intelligence and Reporting.

3. Project scope

Customer Satisfaction, Improve Customer Experience, Managing customer contact information to developing personalized marketing campaigns to Increase Number of Sales.

4. Business requirements

Priority level	Critical level	Requirement description
1	High	Contact Management
2	High	Business Intelligence & Reporting
3	High	Sales Opportunity Tracking
4	Medium	Data Management
5	Medium	Personalized Marketing Campaigning

5. Key stakeholders

Name	Job role	Duties
Muhammad Zeeshan UI Haq	Project Manager & Developer	CRM Development & Implementation
Mohammed Abueida	Accounts	Clients Contact Entry, Invoice & Report Generating
Ali Raza	Electrical & Mechanical Head	Give details of Clients Electrical & Mechanical Work
Arshad Khan	Painting Head	Give details of Clients Painting Work
Abdul Jabar	Denting Head	Give details of Clients Denting Work

6. Project constraints

Constraint	Description
Budget	Stick to AED 5500/-
Team Availability	Must stick the team member to schedules
Project Risk	Low Adaption Rate

7. Cost-benefit analysis

Cost	Benefit
Team Time	Team Members can create lasting deliverables
CRM Software	Provide inside into the Customer Relationship Management
Clouds Hosting	24/7 and Every Device from Every Where.
Total cost: AED 5500/Month	Expected ROI: AED 9000/Month

CONTENT

CRM Planning and Implementation

- Phase Discovery & Planning Goals
- Phase Design Goals
- Phase Development Goals
- Phase Testing Goals
- Phase Deployment Goals

One Page Planning Process

- Phase Discovery & Planning Plan
- Phase Design Plan
- Phase Development Plan
- Phase Testing Plan
- Phase Deployment Plan

Phase 1: Discovery & Planning

- Phase 1 - Discovery & Planning Goals
- Phase 1 - Discovery & Planning Plan
 - 1.1 Program Plan
 - 1.2 Stakeholder Engagement
 - 1.3 Risk Management
 - 1.4 Scope Management
 - 1.5 Change Management

Phase 2: Design

- Phase 2 - Design Goal
- Phase 2 - Design Plan
 - 2.1 Process Design
 - 2.2 User-Centered Design
 - 2.3 Gap Analysis
 - 2.4 Intergration Planning
 - 2.5 Strategic Alignment

Phase 3: Development

- Phase 3 - Development Goal
- Phase 3 - Development Plan
 - 3.1 CRM Customization
 - 3.2 Change & Data Governance
 - 3.3 Training Materials
 - 3.4 Data Migration
 - 3.5 Quality Assurance

Phase 4: Development

- Phase 4 - Testing Goal
- Phase 4 - Testing Plan
 - 4.1 Software Testing
 - 4.2 Migration Testing
 - 4.3 End-User Training
 - 4.4 Deployment Planning
 - 4.5 Mitigting Deployment Risks

Phase 5: Deployment

- Phase 5 - Deployment Goals
- Phase 5 - Deployment Plan
 - 5.1 User Adoption
 - 5.2 Post Data Verification
 - 5.3 Module Deployment
 - 5.4 Post Deployment Analysis
 - 5.5 Ongoing Support

CMR Implementaiton by lamshaaani

CRM - Master View													Sponsor		PM & Developer			
Goal: To seamlessly implement an CRM system that optimizes organizational processes, enhances data accuracy, improve business process, customer relationships, business intelligence, reporting, and supports strategic objectives.													Y61 Auto Services		lamshaaani			
													Completion Date		Overall Status			
													31 August 2023		Green			
Phases		Workstream Outcomes										Outcomes						
Discovery & Planning		Project Plan Complete & gain approval of a CRM project plan			Stakeholders Engage with stakeholders and gain alignment			Risks Conduct a risk assessment and management			Scope Mgt. Develop clear scope definition and management			Change Mgt. Develop & implement a change mgt. plan			To create a defined CRM project plan with buy-in from stakeholders	
1.0	lamshaaani	1.1	100	G	1.2	100	G	1.3	100	G	1.4	100	G	1.5	100	G	Status	Green
Design		Process Design Develop workflow and process design			User Design Gain feedback for user-centered design			Gap Analysis Perform a gap analysis and customization			Integration Plan Develop integration plans			Alignment Gain strategic alignment and customization			To create a user-centered CRM system design aligns with goals	
2.0	lamshaaani	2.1	100	G	2.2	100	G	2.3	100	G	2.4	100	G	2.5	100	G	Status	Green
Development		Customization Configure and customize CRM script as per need			Governance Implement data governance and Integrity			Training Docs. Create training materials			Data Migration Plan data migration from Quickbook.			Quality Conduct quality assurance and testing			To configure the CRM software to meet specific firm's needs	
3.0	lamshaaani	3.1	100	G	3.2	100	G	3.3	100	G	3.4	100	G	3.5	100	G	Status	Green
Testing		Software Tests Test CRM software thoroughly			Migration Tests Conduct data migration tests			User Training Conduct end-user training and support			Deployment Plan Plan deployment and support			Deployment Risk Mitigate deployment risks			To thoroughly test the CRM system and processes	
4.0	lamshaaani	4.1	100	G	4.2	100	G	4.3	100	G	4.4	100	G	4.5	100	G	Status	Green
Deployment		User Adoption Facilitate user adoption and support			Data Verification Conduct post-deployment data verification			CRM Modules Deploy software modules			Post Analysis Perform post-deployment analysis			Ongoing Support Provide ongoing support and optimization			To successfully deploy the CRM system with smooth transition	
5.0	lamshaaani	5.1	100	G	5.2	100	G	5.3	100	G	5.4	100	G	5.5	100	G	Status	Green
Status Labels		Workstream No.		% complete		Missed milestone, all status red, Going to miss milestone, status orange, All milestones met = Green												

Phase 1: Discovery & Planning Plan

CRM: 1.0 Discovery & Planning Plan											Project Manger & Developer		Business Analyst					
Goal: To create a defined CRM program plan with buy-in from stakeholders.											lamshaaani		lamshaaani					
											Completion Date		Overall Status					
											31 August 2023		Green					
Program Plan		CRM Team Form an CRM Proejct team with key roles			Project Plan Define the project plan and timeline			CRM Partner Full CRM implementation by lamshaaani - No Partner.			Current Issues Develop an understanding of current issues			CRM System Select and acquire an CRM System. Tested: Quickbook Desktop, Deftra ERP.		Complete & gain approval of a CRM project plan		
1.1	lamshaaani	1.11	100	G	1.12	100	G	1.13	100	G	1.14	100	G	1.15	100	G	Status	Green
Stakeholders		Management Involve senior management			Departments Engage department 'Mechanical, Electrical, Painting, & Denting'			Account Specialist Collaborate with Account specialists			Business Issues Understand business issues			Strategy Align with strategic objectives		Engage with stakeholders and gain alignment		
1.2	lamshaaani	1.21	100	G	1.22	100	G	1.23	100	G	1.24	100	G	1.25	100	G	Status	Green
Risk management		Risks Identify and address potential issues and risks			Scope Create a strategy for managing program scope			Monitoring Monitor program data risks			Budget Develop a budget aligned with financial health			Change Invest in change management strategies		Conduct a risk assessment and management		
1.3		1.31	100	G	1.32	100	G	1.33	100	G	1.34	100	G	1.35	100	G	Status	Green
Scope management		Alignment Align with system requirements			Budget Review the budget			Change Align scope with change management.			Quality Implement quality control			Investment Invest in change management		Develop clear scope definition and management		
1.4	lamshaaani	1.41	100	G	1.42	100	G	1.43	100	G	1.44	100	G	1.45	100	G	Status	Green
Change management		Assessment Assess organizational readiness			Stakeholders Identify key stakeholders			Communication Develop a comms plan			Training Create a training plan			Resistance Develop resistance strategies		Develop & implement a change mgt. plan		
1.5	lamshaaani	1.51	100	G	1.52	100	G	1.53	100	G	1.54	100	G	1.55	100	G	Status	Green
Status Labels		Workstream No.		% complete		Missed milestone, all status red, Going to miss milestone, status orange, All milestones met = Green												

Phase 2: Design Plan

CRM: 2.0 Design													Project Manger & Developer		Business Analyst												
Goal: To create a user-cantered CRM system design aligns with goals.													lamshaaani		lamshaaani												
													Completion Date													Overall Status	
													31 August 2023													Green	
Process design		Development Develop processes aligned to CRM system			End-Users Involve end-users in the design phase			Intricacies Address process intricacies and unique quirks			Design Design workflows that leverage the CRM system			Improvements Develop workflow and process design		Develop workflow and process design											
2.1	lamshaaani	2.11	100	G	2.12	100	G	2.13	100	G	2.14	100	G	2.15	100	G	Status	Green									
User design		End-Users Involve end-users in the design phase			Feedback Gather feedback on design proposals			Daily Tasks Align CRM system with day-to-day tasks			User Needs Develop solutions for user-specific needs			User Adoption Aim for seamless user adoption		Gain feedback for user-cantered design											
2.2	lamshaaani	2.21	100	G	2.22	100	G	2.23	100	G	2.24	100	G	2.25	100	G	Status	Green									
Gap analysis		Identification Identify gaps between processes and CRM capabilities			Partners Engage implementation partners or supplier			Customization Customise CRM system aligned to firm's readiness			Outcomes Align customisation with broader software fit			Documentation Document customization decisions		Perform a gap analysis and customization											
2.3	lamshaaani	2.31	100	G	2.32	100	G	2.33	100	G	2.34	100	G	2.35	100	G	Status	Green									
Integration plan		Planning Plan integration with existing business applications			Development Develop interfaces between different systems			Requirements Align the integration with accurate requirements			Cleansing Invest in data cleansing			IT Specialists Involve IT specialists in integration		Develop integration plans											
2.4	lamshaaani	2.41	100	G	2.42	100	G	2.43	100	G	2.44	100	G	2.45	100	G	Status	Green									
Strategic alignment		Assessment Evaluate and define the firm's strategic goals			Alignment Ensure CRM system aligns to strategic goals			Readiness Assess the firm's readiness for CRM system			Risk Mitigation Develop a risk mitigation strategy			Strategy Align CRM system with business strategy		Gain strategic alignment and customization											
2.5	lamshaaani	2.51	100	G	2.52	100	G	2.53	100	G	2.54	100	G	2.55	100	G	Status	Green									
Status Labels		Workstream No.		% complete		Missed milestone, all status red, Going to miss milestone, status orange, All milestones met = Green																					

Phase 3: Development Plan

CRM: 3.0 Development											Project Manger & Developer		Business Analyst					
Goals: To configure the CRM software to meet specific firm's needs.											lamshaaani		lamshaaani					
											Completion Date		Overall Status					
											31 August 2023		Green					
Customization		Configuration Configure the software for process support			Customisation Customize software for organizational fit			Governance Ensure change governance adherence			Documentation Document configuration and customisation decisions			Quality Test software for accuracy and functionality		Configure and customize CRM software		
3.1	lamshaaani	3.11	100	G	3.12	100	G	3.13	100	G	3.14	100	G	3.15	100	G	Status	Green
Change and data governance		Governance Define detailed data governance policies			Change Implement change mgt. governance			Quality Monitor and assess data quality			Assessments Conduct data change impact assessments			Training Conduct stakeholder training on change & governance		Implement data governance and Integrity		
3.2	lamshaaani	3.21	100	G	3.22	100	G	3.23	100	G	3.24	100	G	3.25	100	G	Status	Green
Training materials		Materials Develop training materials			Alignment Align training materials to user responsibilities			Outcomes Align firm's requirements to training materials			Review Review & refine materials based on feedback			Training Develop a detailed plan for training end-users		Create detailed training materials		
3.3	lamshaaani	3.31	100	G	3.32	100	G	3.33	100	G	3.34	100	G	3.35	100	G	Status	Green
Data migration		Assurance Assess the current state of data accuracy			Selection Determine which data is essential for migration			ETL Conduct ETL process management			IT Staff Engage IT specialists in the planning phase			Software Ensure that the data migration aligns to needs		Plan data migration		
3.4	lamshaaani	3.41	100	G	3.42	100	G	3.43	100	G	3.44		G	3.45	100	G	Status	Green
Quality		Software Conduct functional testing			Review Review and adjust based on testing results			Testing Conduct end-user testing for daily activities			Migration Test data migration processes			Training Provide introductory training & support		Conduct quality assurance and testing		
3.5	lamshaaani	3.51	100	G	3.52	100	G	3.53	100	G	3.54	100	G	3.55	100	G	Status	Green
Status Labels		Workstream No.		% complete		Missed milestone, all status red, Going to miss milestone, status orange, All milestones met = Green												

Phase 4: Testing Plan

CRM: 4.0 Testing													Project Manger & Developer		Business Analyst			
Goal: To thoroughly test the CRM system and processes.													lamshaaani		lamshaaani			
													Completion Date		Overall Status			
													31 August 2023		Green			
Software testing		Modules Test modules, features, and functions			Issues Identify and resolve issues from testing			Testing Conduct full- scale system testing			End-Users End-users test system for daily activities			Alignment Ensure testing aligns with requirements		Test CRM software thoroughly		
4.1	lamshaaani	4.11	100	G	4.12	100	4.1		4.11	100	G	4.12	100	4.1		4.11	100	Green
Migration testing		Validation Validate data migration processes for data accuracy			Review Review the results of data migration testing			Alignment Align data migration with business goals			Quality Conduct data quality checks in migration testing			Preparation Prepare end- users for the transition		Conduct data migration tests		
4.2	lamshaaani	4.21	100	G	4.22	100	4.2		4.21	100	G	4.22	100	4.2		4.21	100	Green
User training		Training Provide detailed training to end- users			Materials Create user- friendly training materials			Resources Provide training resources for users' daily tasks			Engagement Conduct end-user training and urge engagement			Readiness Create change readiness assessment tests		Conduct end-user training and support		
4.3	lamshaaani	4.31	100	G	4.32	100	4.3		4.31	100	G	4.32	100	4.3		4.31	100	Green
Deployment plan		Preparation Prepare for potential issues in deployment			Readiness Ensure deployment plans account for change readiness			Monitoring Monitor user adaptation and provide support.			Migration Plan data migration ahead of deployment			Modules Determine module deployment strategy		Plan deployment and support		
4.4	lamshaaani	4.41	100	G	4.42	100	4.4		4.41	100	G	4.42	100	4.4		4.41	100	Green
Risk mitigation		Issues Identify potential deployment issues			End-Users Engage end- users in the transition process			Support Provide post- deployment support			Legacy Set-up plan to run older systems in parallel			Monitoring Monitor user adaptation and track progress		Mitigate deployment risks		
4.5	lamshaaani	4.51	100	G	4.52	100	4.5		4.51	100	G	4.52	100	4.5		4.51	100	Green
Status Labels		Workstream No.		% complete		Missed milestone, all status red, Going to miss milestone, status orange, All milestones met = Green												

Phase 5: Deployment Plan

CRM: 5.0 Deployment														Project Manger & Developer		Business Analyst			
Goal: To successfully deploy the CRM system with smooth transition.														lamshaaani		lamshaaani			
														Completion Date		Overall Status			
														31 August 2023		Green			
User Adoption		User Support Provide support for users during the transition			User Questions Address user questions and issues promptly			User Adoption Encourage users to embrace the new system			Monitor Users Monitor user behaviour and gather feedback			Partner Leverage the expertise of the CRM partner		Facilitate user adoption and support			
5.1	lamshaaani	5.11	100	G	5.12	100	5.1		5.11	100	G	5.12	100	5.1		5.11	100	G	
Data verification		Migration Complete the data migration process			Alignment Verify data requirements			Monitoring Monitor data quality post- deployment			Review Review system performance and functionality			Issues Address post-deployment issues		Conduct post-deployment data verification			
5.2	lamshaaani	5.21	100	G	5.22	100	5.2		5.21	100	G	5.22	100	5.2		5.21	100	G	
CRM Modules		Deployment Determine how to deploy modules - all or in stages			Prioritization Prioritize high- priority modules for deployment			Sequence Plan the module deployment sequence			Legacy Run legacy systems in parallel for risk mitigation			Monitoring Track the progress of deployment and user adaptation		Deploy software modules			
5.3	lamshaaani	5.31	100	G	5.32	100	5.3		5.31	100	G	5.32	100	5.3		5.31	100	G	
Post Analysis		Post Analysis Conduct a post-deployment phase analysis			User Feedback Gather feedback on system performance			Improvement Identify areas for improvement and optimization			Issues Address any issues that arise after deployment			Features Assess enhancing system functionality		Perform post-deployment analysis			
5.4	lamshaaani	5.41	100	G	5.42	100	5.4		5.41	100	G	5.42	100	5.4		5.41	100	G	
Ongoing Support		Support Maintain ongoing support team			Performance Monitor the system's performance			Change Access OCM strategies and governance			Adoption Align long-term adoption with firm's goals			Communication Maintain communication and training		Provide ongoing support and optimization			
5.5	lamshaaani	5.51	100	G	5.52	100	5.5		5.51	100	G	5.52	100	5.5		5.51	100	G	
Status Labels		Workstream No.		% complete		Missed milestone, all status red, Going to miss milestone, status orange, All milestones met = Green													

256,4560 PKR
Sales

565,4560 PKR
Recovery

Return

565,456 PKR

New Customers

12

March 2022 | Sales & Recovery

Recovery	Achieved	12909701
	Target	18464020
Sales	Achieved	24910375
	Target	35550000

Below Sales Target

235,455

Target Met **80%**

Top Salesman | Sale

897,7700 PKRs
Aleem Sab

221.7 K	357.3 K	273.2 K	169.9 K	175.9 K	685.3 K	127.4 K	520.4 K	4,489.9 K	466.6 K	374.4 K	53.4 K	62.3 K
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Top Salesman | Recovery

656,456 PKRs
Shahid Iqbal Sab | Punb

New Customers Development

456,456 PKRs
Javed Sab

Achieved	5
Target	5

"Scorecard Template" Score card FY 21/22

Sr#	Business Measures / KPI	Calculation Formula	Champion	Weight in Role Specific Key Expectation	Measuring Unit	Reporting Period	Conn. With BSC	Target / Actual	FY 21/22												
									Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
1	Sales Achievement / Target	=(Actual Sales/Target Sales)*100		20%	%	Monthly	Financial	TARGET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
								ACTUAL	18%	65%	91%	97%	14%	44%	6%	11%	5%	8%			
								% Achievement	3.60%	13.00%	18.20%	19.40%	2.80%	8.80%	1.20%	2.20%	1.00%	1.60%			
2	New Customer Addition	=Total Customers-Existing Customers		10%	Number	Monthly	Financial	TARGET	12	12	25	20	15	16	10	10	20	40	40	10	
								ACTUAL	2	13	22	20	1	9	0	0	0	0			
								% Achievement	1.67%	10.00%	8.80%	10.00%	0.67%	10.00%	0.00%	0.00%	0.00%	0.00%			
3	Percentage Sales Contribution (Existing Customers)	=(Actual Sales (Existing Customers)/Total Sales)*100		10%	%	Monthly	Financial	TARGET	80%	80%	80%	80%	80%	80%	60%	60%	60%	70%	70%	90%	
								ACTUAL	72%	89%	83%	72%	87%	90%	100%	100%	100%	100%			
								% Achievement	9.00%	10.00%	10.00%	9.00%	10.00%	8.89%	6.00%	6.00%	6.00%	7.00%			
4	Percentage Sales Contribution (New Customers)	=(Actual Sales (New Customers)/Total Actual Sales)*100		10%	%	Monthly	Financial	TARGET	20%	20%	20%	20%	20%	20%	40%	40%	40%	30%	40%	10%	
								ACTUAL	28%	11%	17%	28%	12%	10%	0%	0%	0%	0%			
								% Achievement	10.00%	5.50%	8.50%	10.00%	6.00%	5.00%	0.00%	0.00%	0.00%	0.00%			
5	Route Compliance	=(Number of Actual Client Visits/Number of Planned Client Visits)*100		10%	%	Monthly	Internal	TARGET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
								ACTUAL	60%	85%	78%	78%	78%	88%	15%	31%	37%	37%			
								% Achievement	6%	9%	8%	8%	8%	9%	2%	3%	4%	4%			
6	Department Performance Review Adherence	=(No of employees pass through PM System / Total No of employees) * 100		10%	%	Monthly	Internal	TARGET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
								ACTUAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	37%			
								% Achievement	10%	10%	10%	10%	10%	10%	10%	10%	10%	4%			
7	Average Transaction Value	=Total Sales Value/Number Of Transactions		10%	PKR	Monthly	Financial	TARGET	200000	200000	200000	200000	200000	150000	80000	80000	80000	80000	80000	80000	
								ACTUAL	194805	164206	110509	70993	40437	65069	35000	17500	22500	22500			
								% Achievement	10%	8%	6%	4%	2%	4%	4%	2%	3%	3%			
8	Recovery Acheivement	=(Actual Recovery/Target Recovery)*100		10%	%	Monthly	Financial	TARGET	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%		
								ACTUAL	85%	81%	76%	70%	48%	52%	91%	19%	8%	8%			
								% Achievement	9%	8%	8%	7%	5%	5%	9%	2%	1%	1%			
9	NEW Customer Conversion	=(new customer added/total new customer visited)*100		10%	%	Monthly	Internal	TARGET	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%		
								ACTUAL	2%	14%	51%	77%	7%	8%	0%	0%	0%	0%			
								% Achievement	1%	4%	10%	10%	2%	2%	0%	0%	0%	0%			
100%								Overall Performance	59%	77%	86%	87%	46%	63%	32%	25%	24%	20%	0%	0%	

Updated On:
14-4-2022 01:25 PM

Sale & Recovery Detail Summary April-2022

April Summary

Sr. No	Salesman Name	Sale April			Sale Gap		Recovery April			Recovery Gap		New Customers			Customers Gap	
		Target	Achieved	%	Amount	%	Target	Achieved	%	Amount	%	Target	Achieved	%	No.	%
1	Shahid-Aman	2500000	1144285	46%	-1355715.00	-54%	4080000	1374401	34%	-2705599.00	-66%	4	1	25%	-3.00	-75%
2	Shahid Sab	3000000	2136950	71%	-863050.00	-29%	3432000	1065000	31%	-2367000.00	-69%	4	1	25%	-3.00	-75%
3	Aleem Sab	4000000	3750555	94%	-249445.00	-6%	3720000	671800	18%	-3048200.00	-82%	4	2	50%	-2.00	-50%
4	Boss	4000000	1405191	35%	-2594809.00	-65%	3092000	300000	10%	2792000.00	90%	0	1	0%	-1.00	0%
5	Kashif Sab	3000000	856980	29%	-2143020.00	-71%	2360000	525000	22%	1835000.00	78%	4	0	0%	-4.00	-100%
6	Nouman Sab	3500000	1994840	57%	-1505160.00	-43%	3500000	454950	13%	3045050.00	87%	0	0	0%	0.00	0%
7	Javed Sab KPK	4000000	4302795	108%	302795.00	8%	4400000	611540	14%	3788460.00	86%	4	7	175%	-3.00	0%
8	Javed Sab LHR	2100000	0	0%	-2100000.00	-100%	0	0	#DIV/0!	0.00	#DIV/0!	0	0	0%	0.00	0%
9	Cash Sale	0	0	#DIV/0!			0	0	#DIV/0!			0	0	0%	0.00	0%
		26100000	15591596	60%	-10508404.00	-40%	24584000	5002691	20%	-19581309.00	-80%	20	12	60%	-8.00	-40%

Javed Sab KPK (Timber Girah, Chakdara, Qabal, Matta & Madain) - Recovery List**Days****Visit
9/5/22**

No	Customer Name	Customer Balance	Payment Last Date	Last Payment	Forcast	Actual Recovery			Orders		C. Visit	Promise Action
						Cash	Cheq	Online	Forcast	Achieved		
1	WASEEM FASHION GHAR TIMERGARA	307220	18/04/2022	100,000	184,332							
2	JAN MEGA MALL TIMER GRAH	795410	20/04/2022	100,000	477,246							
3	JOLLY SHOES TIMER GRAH	638415	19/04/2022	15,000	383,049							
4	NEW SARHAD LADIES SHOES CHAKDRA	184480	18/04/2022	25,000	110,688							
5	NEW SARHAD SHOES CHAKDRA	83945			50,367							old ledger
6	WAKEEL SHOPING CENTER MATTA				-							
7	JAMSHED SHOES MATTA				-							
8	DAWOOD SHOES MATTA				-							
9	WATAN SHOES MATTA				-							
10	NAIMAT SHOES MATTA				-							
11	RAHEEM SHAH SHOES MADAIN				-							
12	ADIL SHOES MADAIN SHOES				-							
		2,009,470		240,000	1,205,682				-		#	