Adventure Works BI Project

Business Process Interviews

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Our reseller and Internet sales channels are managed independently because of the distinct differences in the two sales models. I’m ultimately responsible for both channels, but on a day-to-day basis, the Internet sales Web site is managed by IT. The finance team get the revenue figures from the database, and the marketing team do some analysis of the data generated by the Internet sales site to help them plan future marketing campaigns. I want to be more aware of what’s happening in our Internet sales channel, particularly in terms of the geographic breakdown of customers; but the main focus of my team for the next fiscal period is to improve sales performance in our reseller channel. We have a number of sales representatives who manage reseller sales accounts. Each sales representative is responsible for reseller sales in a particular sales region, which is in turn broken down into territories. I need to be able to see monthly and quarterly sales revenue by regional sales manager, and be able to drill down to see figures for individual sales representatives.

Brian Welcker

Vice President of Sales



The North America region is broken down into two countries: the US and Canada. Then, within the US there are five sales territories. I manage a sales representative for each territory. The other regions have a similar structure, though I don’t think they all break countries down into individual territories.

The sales representatives manage relationships with resellers within their territory, and regularly talk to the buyers at those resellers. The buyers place orders by email, fax, or telephone and we process the orders on the Monday before the last Friday of each month. That gives us time to assemble the ordered items and get them shipped on the last Friday of the month. Resellers can cancel part or all of any order right up until it is shipped, so we don’t consider the sales complete until the order has shipped.

We need to be able to compare sales across the regions, so ideally we’d like to be able to view total sales revenue broken down by region, country, and territory. I also need to see sales revenue by salesperson.

We typically compare sales by month, but it’s good to be able to roll up the figures into fiscal quarters or fiscal years. I also want to be able to view sales by reseller, based on the country, state or province, and city where they’re located; and by reseller type.

Stephen Jiang

Sales Manager for North America



The marketing team really participates in two aspects of the business. We work with the sales team to try to analyze and understand what our customers are buying, and how effective our Internet sales promotions have been. We then use those insights to help us plan campaigns and promotions.

Campaigns are long-term marketing initiatives that we use to reach customers and position our products, like a TV advertisement or a poster campaign. Promotions are specific offers that customers can take advantage of, like a special discount or a free gift with purchase. Some campaigns are designed to support a specific product, promotion, or both. Others are more generic.

At the moment, the Internet sales site captures promotion response, and we have a working database where those are managed.

David Bradley

Marketing Manager

My role is to manage the transfer of sales transaction data from the Internet sales application to the accounts system. I use a Web application to export each day’s sales transactions from the Internet sales database, and reconcile that with the electronic payments processed by the e-commerce site. Then I make sure that the cost and revenue is entered into the accounts ledger.

Each sales transaction can include multiple line items, and for each line item there is a unit cost, unit price, and a quantity. The total cost for the sale is the unit cost multiplied by the quantity, and similarly, the sales amount is the unit price multiplied by the quantity.

Candy Spoon

Accounts Receivable Specialist

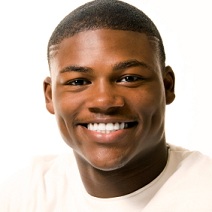


Although I work in the marketing department, my main focus is on Internet sales. I manage the active promotions and ensure that they get included in the Internet sales site so that we can evaluate their effectiveness. When customers place orders in response to specific promotions, the e-commerce site tracks those and I can analyze the results. Additionally, the customer profiles in the e-commerce site capture a lot of useful demographic information that can be really useful for analyzing sales and planning future promotions and campaigns.

I want to be able to see the revenue and profit for Internet sales by calendar (not fiscal) year, and then drill into individual months and even days to try to find patterns. I’d like to be able to cross-analyze that by product, customer, and promotion. Products are categorized and subcategorized, so I’d like to be able to summarize sales at each level, and similarly, I’d like to summarize promotions by type as well as by individual promotion. For customers, I want to be able to summarize by country, state or province, and city – but I’d also like to be able to filter and slice by any other demographic information that is tracked in the e-commerce site.

Jill Williams

Marketing Specialist



I’m working on a team to try to formalize our approach to campaign planning. Until now, it’s been a bit disorganized, so I’m trying to put a process in place for us to store details of campaigns in a database, so that when the campaigns are over we can analyze how the actual cost of the campaign compared to budget. Ultimately, I’d like to be able to slice and dice those figures by the products and promotions the campaigns were designed to support to see if there’s a correlation between campaign costs and particular product categories or types of promotion. Each campaign has a specific start and end date, so we could also see if the starting or ending year, quarter, or month has an impact.

However, we’re only in the very early stages of putting the database together, so there’s not really enough data to analyze yet.

Sariya Harnpadoungsataya

Marketing Specialist

I manage the databases for both the reseller sales system and the Internet sales site. The reseller system is an internal Windows application that we built using the Microsoft .NET Framework, and its database is named **ResellerSales** and hosted on the **MIA-SQLRSLR** database server. The Internet sales site is an ASP.NET Web application, and its database is named **InternetSales** on the **MIA-SQLWEB** server.

We used to store product data in both systems, but it quickly got out of sync, so we’ve implemented SQL Server Master Data Services and use that as a central hub for all product data. The MDS database is named **ProductsMDS** and is on the **MIA-SQLMDM** database server.

The Marketing team uses a small database on **MIA-SQLMKTG**, but it’s not centrally managed and rarely used. I think it was created to store the names and types of promotions for Internet sales customers. The team started to store data about marketing campaigns there as well, but I don’t think that’s been completed.

I’ve ensured that your Windows account has sufficient access to examine the data in these databases. I can’t give to access to the financial accounts system, but there’s an example of the kind of text exports we can get from it in the D:\Accounts folder on your computer.

François Ajenstat

Database Administrator

Our accounts system currently gives us the financial reporting we need, which is basically to compare financial figures across accounts and departments. I’d like to be able to analyze financial figures by scenario more easily, so that we can compare actual figures against budgeted figures; but I can get by with what we have for the moment.

The key thing that concerns me as a member of the executive board is that our reseller sales channel seems to be struggling to match the performance of the Internet sales site. Our top priority is to analyze what’s happening in the reseller sales territories and identify opportunities to improve sales performance.

Laura Norman

Chief Financial Officer