

# Bolt

Report - by Farouk Jaziri



# Outline

- Executive Summary
- Introduction
- Methodology
- Code
- Findings
- Conclusion
- Appendix

# Executive Summary

- Prioritize the Outreach channel to enhance acquisition efforts.
- The outreach channel is the leading source of completed orders across all tiers, with Tier 4 transitioning from organic to outreach in the past six months.
- There is generally no relationship between the number of completed orders and new companies, except for Tier 4, which shows a closer correlation.
- There is a strong positive correlation between completed orders and revenue.
- For a more meaningful analysis, compare monthly values with the same period in previous years, as comparing with previous months only reveals value trends.

# Introduction

- In this presentation, we used 2 datasets:
  - Acquisition Data
  - Orders Data
- We want to provide insights from Bolt Business data to inform strategic decisions for top-level management.
- From this we will analyze and understand the data we will use.

# Methodology

- Use Power BI to clean the data and create calculations as well as visuals.
- Analyze acquisition trends and identify patterns by region, channel, and segment.
- Analyze Orders and Revenue trends and identify patterns by region, channel, and segment.
- Understand the relationship between these variables.

# Code

## Cumulative:

```
1 Cumulative_Order =  
2     CALCULATE(  
3         SUM( Orders[Orders] ),  
4         FILTER(  
5             ALL(DateTable),  
6             ISONORAFTER(DateTable[Date], MAX(DateTable[Date]), DESC)  
7             && DateTable[Year] = SELECTEDVALUE(DateTable[Year])  
8         )  
9     )
```

## Previous month value:

```
1 Prev_rev = CALCULATE(  
2     SUM(Orders[Revenue]),  
3     DATEADD(DateTable[Date], -1, MONTH),  
4     REMOVEFILTERS(Months[Month Name])  
5 )
```

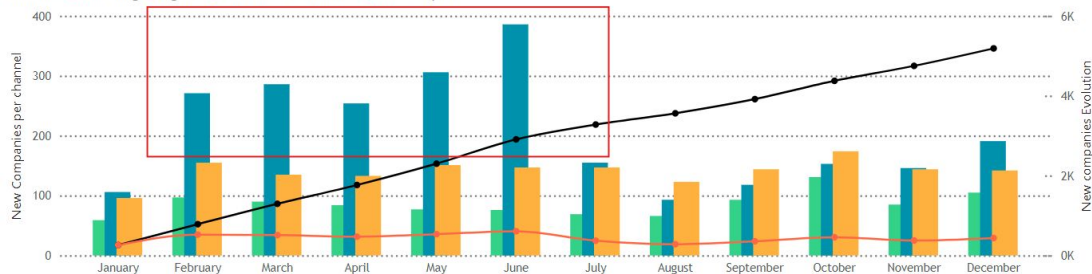
## Average of previous years:

```
1 Avg =  
2 VAR count_years = CALCULATE(COUNTROWS(DISTINCT(DateTable[Year])), DateTable[Year] < SELECTEDVALUE(DateTable[Year]))  
3 RETURN  
4     CALCULATE(SUM(Acquisition[New Companies]), DateTable[Year] < SELECTEDVALUE(DateTable[Year])) / count_years
```

# Findings

Yearly Acquisition vs Channels

Channel ● Marketing ● Organic ● Outreach ● Cumulative ● New Companies



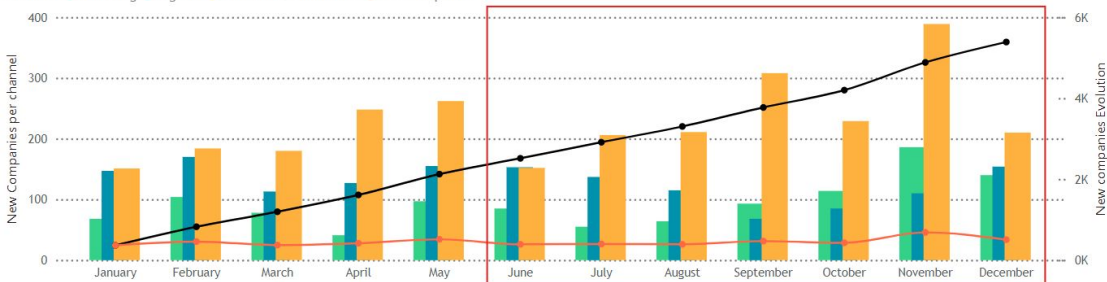
Year

2022

In June, aqising new companies were better in 2022 than 2023, but in December 2023 was the maximum of previous years, thanks to Outreach channels especially in Nov 2023.

Yearly Acquisition vs Channels

Channel ● Marketing ● Organic ● Outreach ● Cumulative ● New Companies

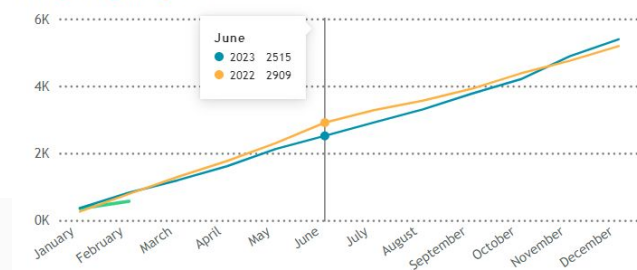


Year

2023

Cumulative New Companies aquired

Year ● 2024 ● 2023 ● 2022



# Findings

## Comparing previous months

Month over Month change vs Acquisition



Starting from Dec 2023, the acquisition of new companies is becoming lower, but comparing to the previous years in the same months, the new companies are rising.

## Same month comparing previous years

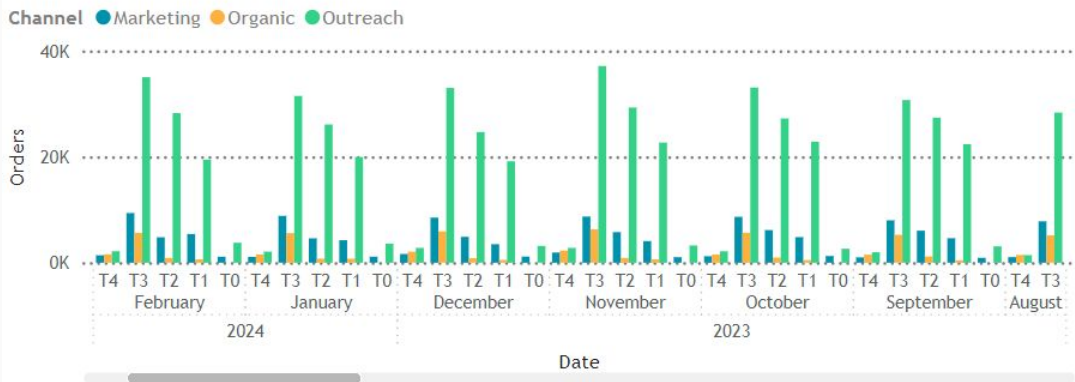
Month	December				
Region	Current	Previous	VS Previous	Avg	VS Avg
Aquilonia	45	65	▼	-20	29
Lumina	109	97	▲	12	103
Novaria	60	101	▼	-41	13
Seraphica	43	55	▼	-12	43
Solsticea	40	65	▼	-25	85
Valoria	33	90	▼	-57	85
Veridia	174	212	▼	-38	80
Total	504	685	▼	-181	438

Month	January				
Region	Current	Previous	VS Previous	Avg	VS Avg
Aquilonia	60	45	▲	15	44
Lumina	68	109	▼	-41	53
Novaria	31	60	▼	-29	17
Seraphica	22	43	▼	-21	14
Solsticea	29	40	▼	-11	44
Valoria	40	33	▲	7	53
Veridia	100	174	▼	-74	91
Total	350	504	▼	-154	314

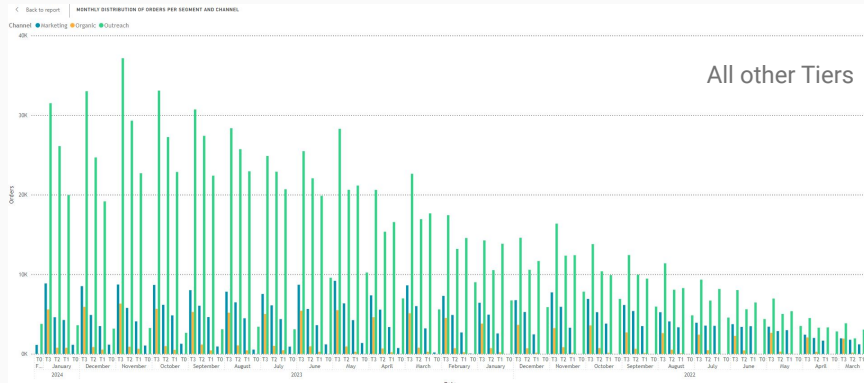
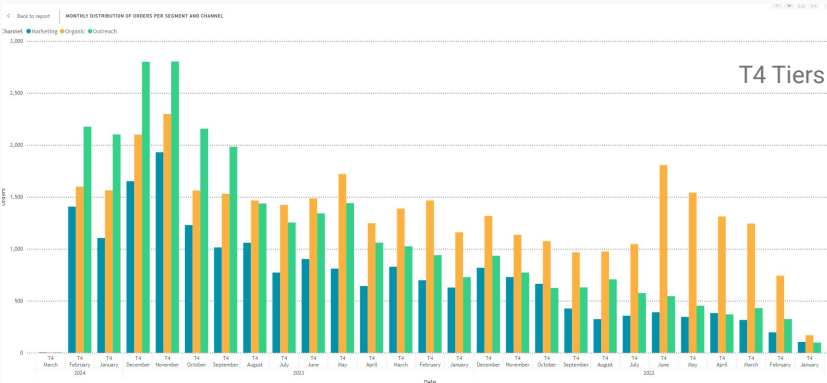


## Findings

### Monthly distribution of Orders per Segment and Channel



Outreach channel ranks first for completed orders across all tiers over the past six months. All tiers have orders from the outreach channel, except T4, which shifted from organic to outreach.



# Findings

There is no relationship between the number of completed orders and new companies; Tier 4 shows the closest correlation, while no relationship exists for the others.

All Tiers selected

Only T4 selected

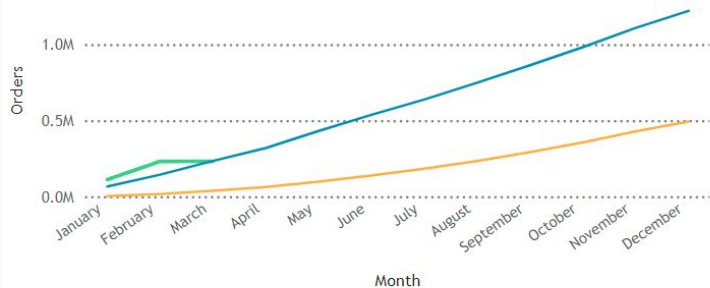


# Findings

A strong relationship between orders completed and revenue.

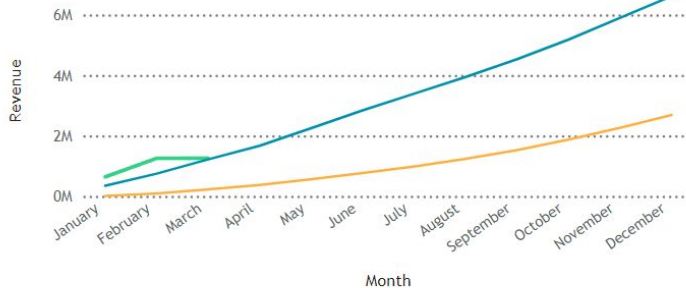
Monthly Cumulative Orders

Year ● 2024 ● 2023 ● 2022



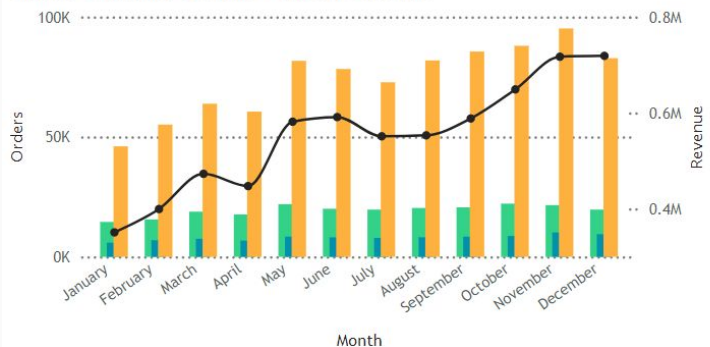
Monthly Cumulative Revenue

Year ● 2024 ● 2023 ● 2022



Orders per Channel vs Monthly Revenue

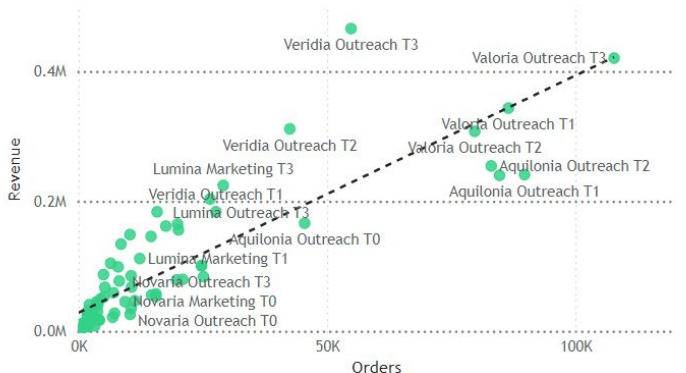
Channel ● Marketing ● Organic ● Outreach ● Revenue



Relationship between Orders and Revenue by Channel Segment & Region

Year

2023



# Conclusion

- Focus on Outreach channel for more acquisition.
- Compare monthly values with the same period in different years, as comparisons with previous months only show the evolution of values.
- Tiers and channels are key features in our datasets that influence relationships between other variables.
- A significant positive relationship between completed orders and revenue.

# Appendix

I have created this dashboard to create a dynamic report where you can interact with different elements of the data:

[Click here.](#)

PS: if the link didn't work please let me know

