Solution Challenge #399: AAI Special Edition – Sales Spotlight: A Deep Dive into Regional Performance

Task:
Create a Mission (KPI Deep Dive Report) using the preloaded **Sales Analysis** dataset (available in the Datasets tab) using the **Revenue** column as your **Measure**.

Here are the answers to your second Auto Insights challenge.

1. How did **Revenue** trend in November 2022 compared to November 2021?
   a. **Increased by $620.06m (33.63%).**
   b. Increased by $2.46b.
   c. Revenue did not increase.

   To get there:
   a. Select **View Page**.
   b. In the **vs** field **Date** select the option **Same period previous year** (Nov 2021).
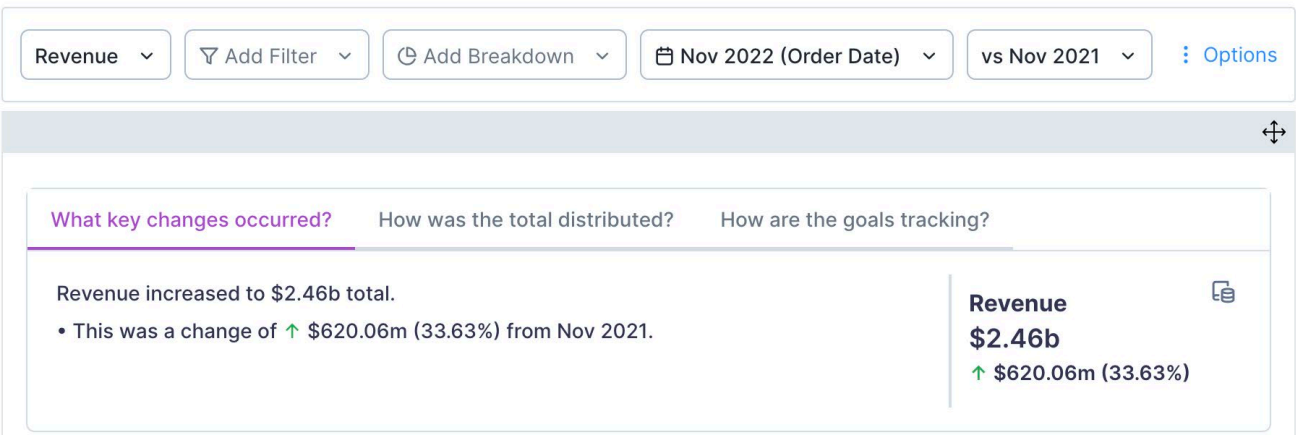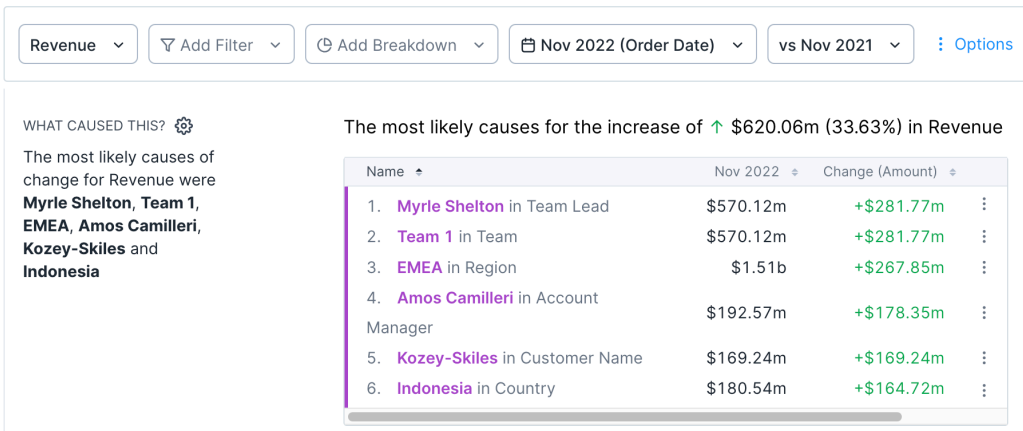

2. What was the top driver of this change in revenue?
   a. **Myrle Shelton in Team Lead**
   b. Team 2 in Team
   c. APAC in Region
   d. Anne Pealing in Account Manager

   To get there:
   a. Query bar same as Q1.
   b. Scroll down the page to **What Caused This?**.

| | Revenue ▾ | ▽ Add Filter ▾ | ⏱ Add Breakdown ▾ | 📅 Nov 2022 (Order Date) ▾ | vs Nov 2021 ▾ | ⋮ Options |

WHAT CAUSED THIS? ⚙

The most likely causes of change for Revenue were **Myrle Shelton**, **Team 1**, **EMEA**, **Amos Camilleri**, **Kozey-Skiles** and **Indonesia**

The most likely causes for the increase of ↑ $620.06m (33.63%) in Revenue

Name ▴	Nov 2022 ⬍	Change (Amount) ⬍	
1. **Myrle Shelton** in Team Lead	$570.12m	+$281.77m	⋮
2. **Team 1** in Team	$570.12m	+$281.77m	⋮
3. **EMEA** in Region	$1.51b	+$267.85m	⋮
4. **Amos Camilleri** in Account Manager	$192.57m	+$178.35m	⋮
5. **Kozey-Skiles** in Customer Name	$169.24m	+$169.24m	⋮
6. **Indonesia** in Country	$180.54m	+$164.72m	⋮

3. Which company sizes trended in the same direction as the overall change? And which company sizes trended in the opposing direction? Select all that apply. (Your objective is to highlight the high growth and opportunity areas to target with different strategies next year.)
   a. **Same Direction: Large Enterprise and Enterprise**
   b. Same Direction: Large Enterprise and Small Medium Business
   c. **Opposing Direction: Small Business with less than 100 employees**
   d. Opposing Direction: Enterprise
   e. **Opposing Direction: Small Medium Business**

To get there:
   a. Query bar same as Q1.
   b. Add Breakdown = Company Size
   c. Change to **How was the total distributed?** view.
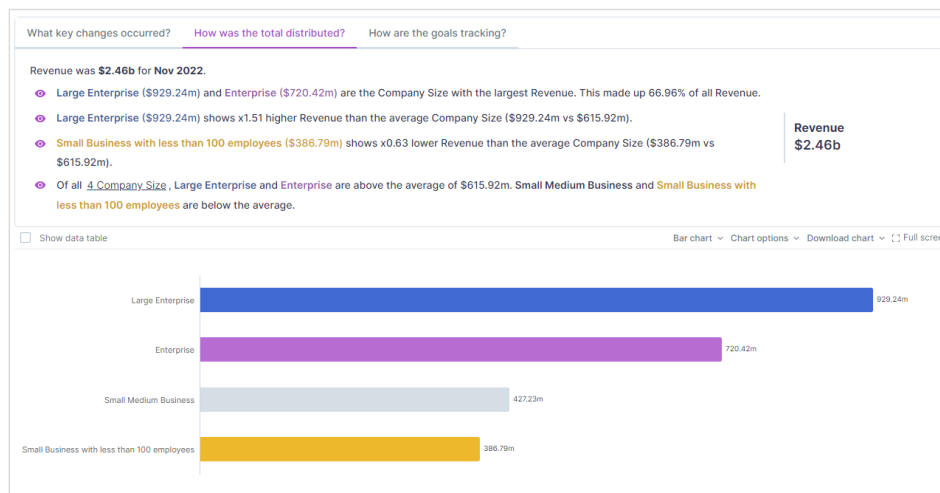
4. How did BAU Tech perform against its goal for revenue?
   a. **$10.87m (0.44%) above goal**
   b. $98.55m (15.85%) above goal
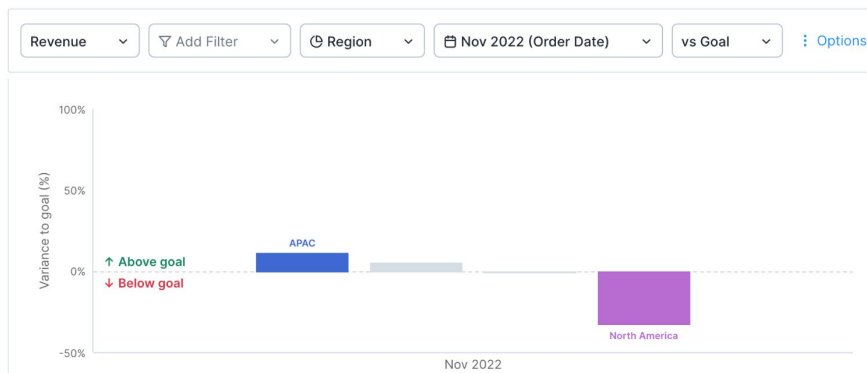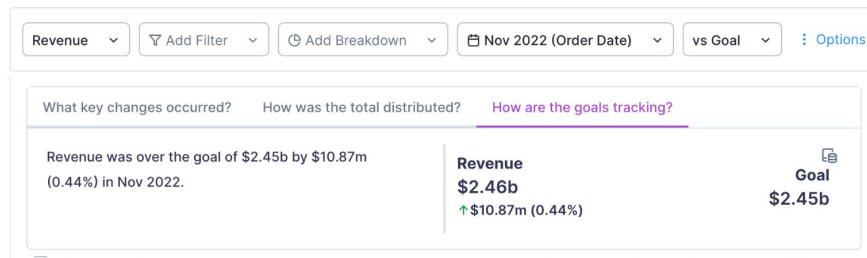   c. $58.3m (5.9%) below goal
   d. $3.9m (0.16%) below goal

   To get there:
   a. Query bar same as Q3.
   b. Change to **How are the goals tracking?** view.

5. Which regions did or did not meet their goal? Select all that apply.
   a. **APAC met their goal.**
   b. **LATAM met their goal.**
   c. North America met their goal.
   d. **EMEA did not meet their goal.**

   To get there:
   a. Add Breakdown = Region
   b. Change to **How are the goals tracking?** view.

6. You would also like to create a Mission for each region and share it with the regional financial controllers. How can you leverage your current Mission as a template to create personalized Missions for each regional financial controller?

Answer: Duplicate your mission and leverage global filters to bulk filter for each region.

a. Navigate back to your Missions page, select the three dots menu, and choose **Make a copy**.	
b. Give your new Mission the name **Regional KPI Report**, and then select **Create Mission**.	
c. Once your new mission is created, select it, and then go to the three dots menu next to **Options**. Choose **Enter edit mode**.	

d. On the left panel, check the box that says **Select pages to edit**.

e. Next to **Edit 7 pages**, select the drop-down menu and choose **Select filters**.

f. Under **Region**, pick one of the available regions and repeat the same process to create missions for the other regions. Select **Apply to selected page**.

g. If needed, you can also update the Mission name to indicate which region it pertains to.

In the Mission Summary page, select **Edit** and modify your Mission's name.

Magic Documents

Your final task is to use Magic Documents to create a PowerPoint presentation for the head of sales, primarily focusing on regional performance. Remember that you are presenting to an executive, so keep your presentation professional!

Answer: Audience = Head of Sales, Objective = Regional Performance, Tone of voice = professional
To get there: Select the Magic Documents tab.