



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

Task:

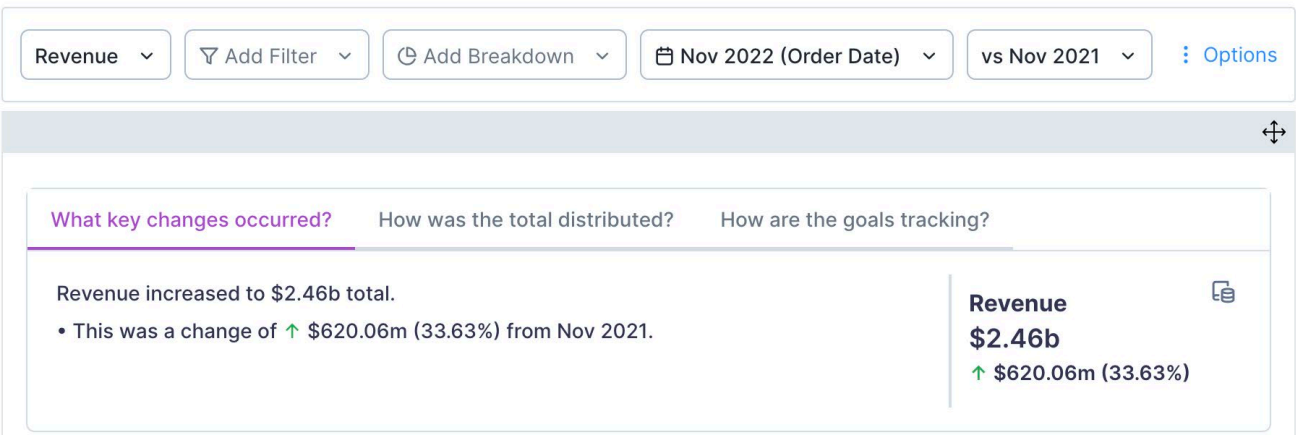
Create a Mission (KPI Deep Dive Report) using the preloaded **Sales Analysis** dataset (available in the Datasets tab) using the **Revenue** column as your **Measure**.

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)**.

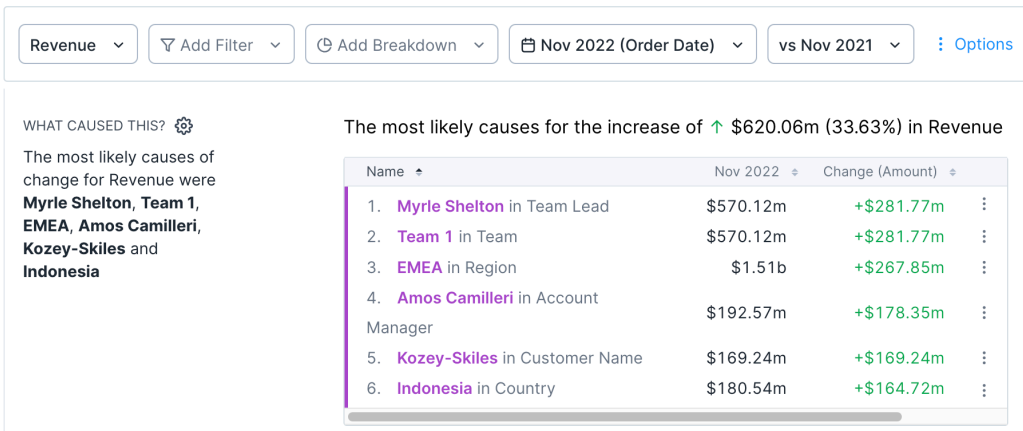


2. What was the top driver of this change in revenue?
 - a. **Myrle Shelton in Team Lead**
 - b. Team 2 in Team
 - c. APAC in Region
 - d. Anne Pealing in Account Manager

To get there:

- a. Query bar same as Q1.
- b. Scroll down the page to **What Caused This?**.

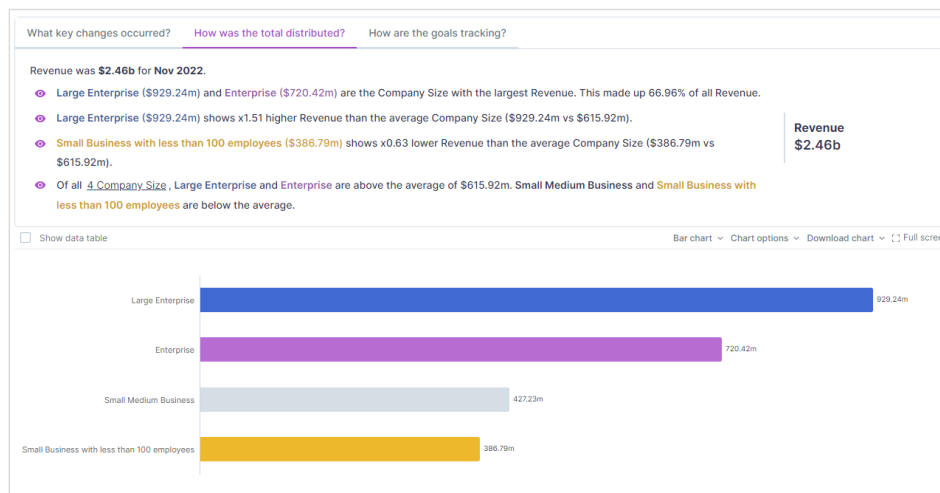




3. Which company sizes trended in the same direction as the overall change? And which company sizes trended in the opposing direction? Select all that apply. (Your objective is to highlight the high growth and opportunity areas to target with different strategies next year.)
- Same Direction: Large Enterprise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

To get there:

- Query bar same as Q1.
- Add Breakdown = Company Size
- Change to **How was the total distributed?** view.





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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

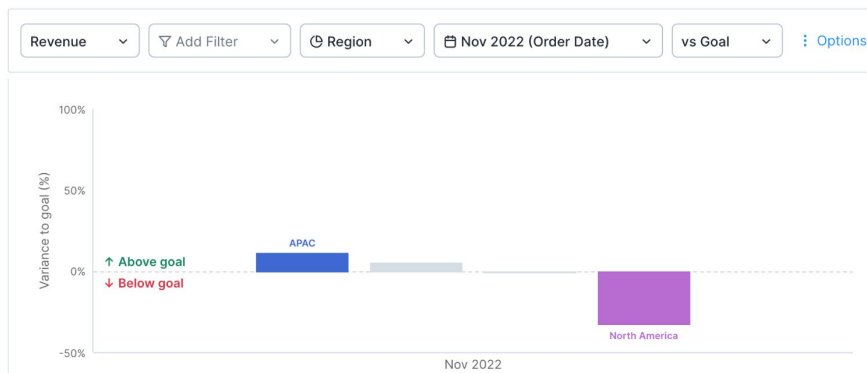
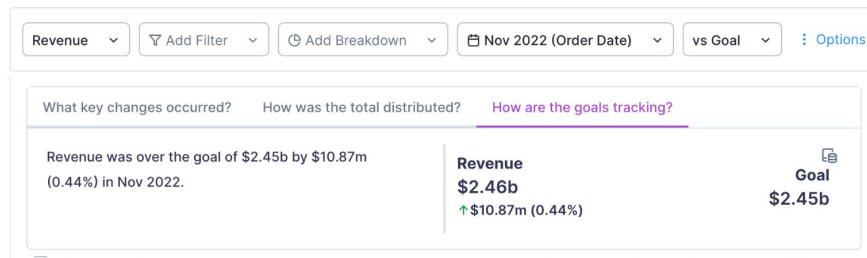
To get there:

- 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.





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- 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.

- Navigate back to your Missions page, select the three dots menu, and choose **Make a copy**.

Missions Start Guide
Quickly identify trends and patterns with auto-generated insights and visualizations.

Choose a Mission template to begin:

- KPI Deep Dive Report: Understand key drivers in detail. Set up in 15 sec.
- Executive Summary: An overview across KPIs. Set up in 10 sec.
- Correlation Analysis Report: Explore links between KPIs. Set up in 30 sec. **New**
- New Mission: Make your own easily. **Create new**

All Missions | My Missions | Shared with me | Sort by Owner | Filter by All Datasets | Search Missions

Name	Owner	Mission Access	Datasets	
Regional Sales Analysis	Sylvia Pereira	Invite only	Sales Analysis Sample Data	⋮
KPI Deep Dive Report 2023-10-28 at 03:47:10	Sylvia Pereira	Invite only	Call Centre Operations Analysis Sample Data	⋮
Sales Monthly Report	Sylvia Pereira	Invite only		⋮
Executive Summary 2023-10-25 at 00:47:22	Sylvia Pereira	Invite only	Cost Analysis Sample Data	⋮

Context menu for 'Regional Sales Analysis':
CREATED: 07 Nov 2023 4:23pm
EDITED: 07 Nov 2023 5:32pm
Edit Mission details
Make a copy...
Delete

- Give your new Mission the name **Regional KPI Report**, and then select **Create Mission**.

Missions Start Guide
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All Missions | My Missions | Shared with me | Sort by Owner | Filter by All Datasets | Search Missions

Make a copy of 'Regional Sales Analysis'

Mission Name 100 characters max
Region KPI Report

Cancel | Create Mission

- Once your new mission is created, select it, and then go to the three dots menu next to **Options**. Choose **Enter edit mode**.

MISSION SUMMARY
Region KPI Report

Revenue: \$2.46b (Nov 2022) vs \$978.02m (65.83%) (Oct 2022)

What caused this \$978.02m increase in Revenue?

Category	Value	% Change
EMEA Region	\$728.05m	+92.92%
Myria Shelton Team Lead	\$358.69m	+109.65%
Team 1	\$358.69m	+109.65%
United Arab Emirates Country	\$171.62m	+100%
Kozey - Skiles Customer Name	\$169.24m	+100%
Freeman Huska Account Manager	\$147.87m	+121.67%

Revenue for Oct 2022 to Nov 2022

Options: Enter edit mode, Open page in Search, Add page to Mission





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

MISSION SUMMARY
Region KPI Report

Revenue

Revenue \$2.46b Nov 2022 vs Oct 2022 ↑ \$978.02m (65.83%)

What caused this ↑ \$978.02m increase in Revenue?

Region	Revenue	% Change
EMEA	\$729.05m	+92.92%
Myrle Shelton	\$358.69m	+169.65%
Team 1	\$358.69m	+169.65%
United Arab Emirates	\$171.62m	+100%
Kozey-Skiles	\$169.24m	+100%
Freeman Huske	\$147.87m	+212.67%

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

MISSION SUMMARY
Region KPI Report

Revenue

Revenue \$2.46b Nov 2022 vs Oct 2022 ↑ \$978.02m (65.83%)

What caused this ↑ \$978.02m increase in Revenue?

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Kozey-Skiles	\$169.24m	+100%
Freeman Huske	\$147.87m	+212.67%

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

MISSION SUMMARY
Region KPI Report

Revenue

Revenue \$2.46b Nov 2022 vs Oct 2022 ↑ \$978.02m (65.83%)

What caused this ↑ \$978.02m increase in Revenue?

Filter

0 selected

- Region (0/4)
 - Select all
 - APAC
 - EMEA
 - LATAM
 - North America
- Strategic Priority (0/4)
- Team (0/13)

Apply to selected pages

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.

MISSION SUMMARY
Region KPI Report

Revenue

Revenue \$2.46b Nov 2022 vs Oct 2022 ↑ \$978.02m (65.83%)

What caused this ↑ \$978.02m increase in Revenue?

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EMEA	\$729.05m	+92.92%
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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.

