USE CASE · SALES PERFORMANCE · FICTIONAL TRAINING DATA

Showroom Sales Funnel Review

Leads are up. Bookings are not. Where is the funnel leaking, and what should we fix first?

The situation

- A car dealer group runs **6 showrooms** in 3 regions: North, Central and South.
- Each month, every showroom reports its sales funnel: **leads, test drives, bookings and deliveries**.
- Marketing spend went up, and leads grew in every showroom. But total bookings stayed almost flat.
- The **Head of Sales** asks you to find out why before the sales review on **15 November 2026**.

13,663
leads, Apr to Sep 2026

1,765
bookings, Apr to Sep 2026

6
showrooms, 3 regions

Your role and task

You are a sales analyst. Use Microsoft 365 Copilot as your thought partner. You design the work and decide; Copilot does the heavy lifting.

Step	What you produce
1 Discover	P.R.E.P: make the data trustworthy. S.C.A.N: find the signals that matter. Result: 3 insights (WHAT + WHY + WHAT to do)
2 Develop	A short story in S.T.O.R.Y form and one Big Idea with a clear ask
3 Design	Data, then story, then visual: one clean chart with a hybrid title
4 Slide	One slide for the Head of Sales

NOTE Works for everyone. **Basic** users use Copilot Chat with the file attached. **Premium** users can also use Copilot in Excel (Chat only, Plan and Allow editing modes) and Copilot in PowerPoint.

The data

File: `Showroom_Sales_Funnel_Apr-Sep_2026.xlsx`. The sheet **Showroom_Sales** is a raw CRM export. It has some data quality problems on purpose. The sheet **Control_Totals** holds the CRM totals you check against.

Column	Meaning
Month	Month, Apr to Sep 2026
Showroom / Region	Penang, Ipoh (North); Petaling Jaya, Shah Alam (Central); Johor Bahru, Melaka (South)
Leads	New sales enquiries
Test_Drives	Test drives completed

Bookings	Cars booked with a deposit
Deliveries	Cars delivered to customers
Avg_Discount_RM	Average discount per booking
Demo_Cars	Demo cars available for test drives
Avg_TD_Wait_Days	Average days a customer waits for a test-drive slot

Key terms

Term	Meaning
Test-drive rate	Test_Drives divided by Leads
Booking rate	Bookings divided by Leads. The main funnel measure.
Close rate	Bookings divided by Test_Drives. How well sales advisors convert after a test drive.

The company, showrooms and figures are fictional. For training only. Real work: follow the company policy for AI tools and customer data.