



Deep Dive Sales Analysis

Case Study

Background

As a portion of intangible valuation following acquisition, our team identified significant sales volatility which required deeper analysis.

Objectives

- + Isolate sales history by product, support and supplemental material sales
- + Analyze customer churn, expansion and new customer conversion
- + Identify expected sales forecast and pacing to inform expected customer relationship expectations
- + Analyze backlog conversion to reforecast sales expectations

Solutions

- + By analyzing the backlog, churn, and conversion data, we developed sales models that contributed to both the valuation and future business planning.

Manufacturing
INDUSTRY

50
EMPLOYEES

\$30M
ANNUAL
REVENUE

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SALES BY CUSTOMER DOCUMENTATION

Top Ten Customers by Assembly Purchases

Customer Name	Part Type	2022	2023	2024	Total '22-'24
	Assembly	2,521,734	2,237,000	-	4,758,734
	Parts	483,847	470,592	137,240	1,091,678
	Nails	268,665	244,939	25,342	538,946
	Assembly	999,305	1,517,348	-	2,516,654
	Parts	63,832	148,218	26,182	238,232
	Nails	76,216	54,168	20,812	151,197
	Assembly	-	904,000	908,800	1,812,800
	Parts	17,499	46,185	9,535	73,218
	Nails	-	-	40,339	40,339
	Assembly	1,365,190	-	-	1,365,190
	Parts	291,366	394,930	63,260	749,556
	Nails	-	-	-	-
	Assembly	-	1,353,000	-	1,353,000
	Parts	-	-	-	-
	Nails	-	-	2,057	2,057
	Assembly	1,340,084	-	-	1,340,084
	Parts	92,112	2,568	8,012	102,692
	Nails	-	-	-	-
	Assembly	-	1,336,170	-	1,336,170
	Parts	16,138	12,226	1,404	29,768
	Nails	-	-	-	-
	Assembly	606,699	693,190	-	1,299,889
	Parts	71,506	61,907	27,164	160,578
	Nails	7,064	-	-	7,064
	Assembly	1,198,125	-	-	1,198,125
	Parts	114,390	47,000	20,718	182,109
	Nails	-	-	-	-
	Assembly	1,112,706	10,800	-	1,123,506
	Parts	111,753	34,272	8,602	154,626
	Nails	-	-	-	-
	Assembly	10,218,418	17,980,637	7,250,560	35,449,615
	Parts	8,883,750	8,662,004	2,607,610	20,153,364
	Nails	19,941,807	9,809,324	3,292,908	33,044,039

Lost Customers

	2022	2023
Parts Customers Lost	(66)	(141)
Annual Revenue	283,303	759,713
Nails Customers Lost	(27)	(46)
Annual Revenue	1,436,869	1,516,540

Assembly/Parts/Nails Statistics

2022
• 29 Customers bought Assemblies
• 12 Bought Nails and Parts
• 17 Bought only Parts
• 0 Bought only Nails
• 0 Didn't buy Nails or Parts
2023
• 39 Customers bought Assemblies
• 17 Bought Nails and Parts
• 17 Bought only Parts
• 4 Bought only Nails
• 1 Didn't buy Nails or Parts

