



Introduction to the report

Annual Overview Report: Universal Export Operations – 2023

Universal Export, a major manufacturing firm situated in Southampton, United Kingdom, specializes in producing plain, unmarked clothes for retailers, distributors, and other businesses. As we begin the New Year, it is critical to reflect on the company's performance during the previous year and identify areas of strength and chances for progress.

The external-facing report is intended to provide shareholders with a detailed overview of Universal Export's operations throughout 2023. It encompasses an analysis of sales and profit patterns over the year, insights into product performance, a comparative review of sales across different countries, and an assessment of our commitment to reducing air shipments from July to December 2023.

The internal report is designed to provide the management team with a complete review of salespeople's performance in 2023. It focuses on crucial measures such as individual sales and profit contributions, performance in obtaining new consumers, and a product analysis to best profit to the least.

Technical Report

The objectives of this report are twofold: firstly, to provide stakeholders with a comprehensive overview of Universal Export's operational status in 2023, and secondly, to offer insights into key aspects of the company's performance, including sales and profit dynamics, product analysis, comparative sales performance across countries, and the impact of sustainability initiatives.

The data utilised for this report comprises various formats Transactions.csv, Salespeople.json, Products.csv, Logistics.txt, Customers.xlsx. Where the data was of different formats which is loaded into Power BI. Subsequently, the data was structured into relationships across different tables. The relationships between these tables are needed to create accurate calculations and to display the information used in the report. The tables are linked based on their unique identification columns, ensuring coherence and reliability in our analysis.

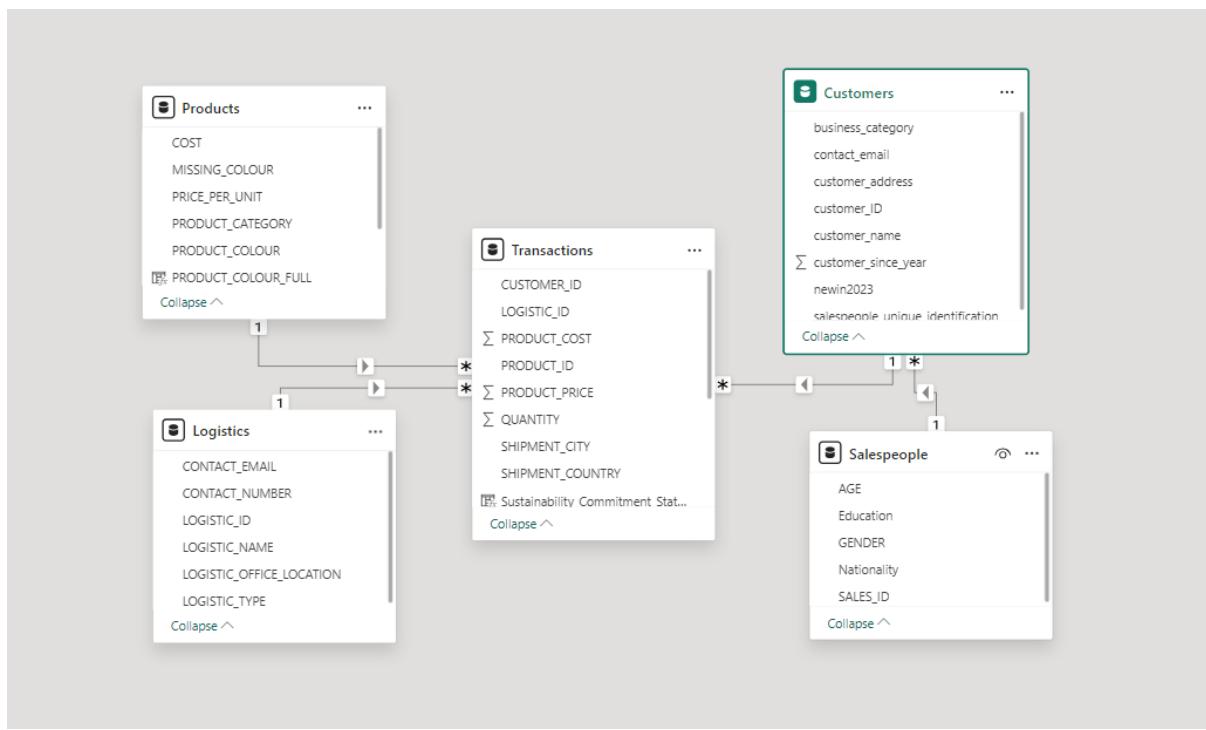
Data Extraction

FILE NAME	DESCRIPTION	ROWS	COLUMNS	ADDITIONAL INFO
TRANSACTIONS.CSV	Contains information about individual garment orders.	1,10,187	11	Comma separated file
CUSTOMERS.XLSX	Contains information about customers.	48	8	Excel file
PRODUCTS.CSV	Contains information about products.	109	6	Comma separated file
LOGISTICS.TXT	Contains information about logistic suppliers.	20	5	Text file
SALESPEOPLE.JSON	Contains information about salespeople.	18	5	JSON format

Management of Data:

Subsequently, the data was structured into relationships across different tables. The relationships between these tables are needed to create accurate calculations and to display the information used in the report. The tables were linked based on their unique identification columns, ensuring coherence and reliability in our analysis.

Data Model View:



These relationships are integrated into each of the datasets to enable comprehensive data analysis. By forming these relationships, we ensure that the data analysis process is streamlined and that the resulting insights are reliable and actionable. Properly connected data enables the production of more meaningful and dynamic visualizations by allowing for precise filtering, sorting and drilling down into the data.

Transformation:

Dax formulas are formulated to make some calculations, as a new measure and column.

1. Total cost – To identify the total cost of the company from the transaction table, the Total cost is found by the sum function to Product_Cost.

```
Total Cost = sum(Transactions[PRODUCT_COST])
```

2. Total Price - To identify the total price of the company from the transaction table, the Total price is found by the sum function to Product_Price.

```
Total Price = sum(Transactions[PRODUCT_PRICE])
```

3. Profit - To identify the profit generated from the price and cost of the products, the Total Price is subtracted from the Total Cost.

```
Profit = [Total Price]-[Total Cost]
```

4. Week – To separate the dates into weeks.

```
Week = WEEKNUM(Transactions[TRANSACTION_DATE],1)
```

5. The dates are split into 2, then using the IF function in DAX is used to perform a logical test and return one value if the test evaluates to TRUE, and another if it evaluates to FALSE. The AND function is used to test multiple conditions. It returns TRUE only if all conditions are TRUE.
- Within Commitment Period: Transactions made from July 1, 2023, to December 31, 2023, inclusive.
 - Outside Commitment Period: Transactions made before July 1, 2023, or after December 31, 2023. This is done to make the transactions from 2024, if they are added into the data not be considered for this report.

```
1 Sustainability_Commitment_Status =
2 IF(
3   AND(
4     'Transactions'[TRANSACTION_DATE] > DATE(2023, 6, 30),
5     'Transactions'[TRANSACTION_DATE] <= DATE(2023, 12, 31)
6   ),
7   "Within Commitment Period",
8   "Outside Commitment Period"
9 )
```

Missing Values

JCT_ID	A ^B C_PRODUCT_NAME	A ^B C_PRODUCT_CATEGORY	A ^B C_PRODUCT_COLOUR	1 ² E_PRICE_PER_UNIT	1.2_COST
100% 0% 0%	● Valid ● Error ● Empty	100% 0% 0%	● Valid ● Error ● Empty	100% 0% 0%	96% 0% 4%
t, 109 unique	109 distinct, 109 unique	6 distinct, 0 unique	15 distinct, 0 unique	11 distinct, 1 unique	11 distinct, 1 unique
1	Unisex T-Shirt in White	T-Shirt	White	6	3
2	Unisex T-Shirt in Grey	T-Shirt	Grey	6	3
3	Unisex T-Shirt in Black	T-Shirt	Black	6	3
4	Unisex T-Shirt in Pink	T-Shirt	Pink	6	3
5	Unisex T-Shirt in Red	T-Shirt	Red	6	3
6	Unisex T-Shirt in Orange	T-Shirt	Orange	6	3
7	Unisex T-Shirt in Beige	T-Shirt	Beige	6	3
8	Unisex T-Shirt in Brown	T-Shirt	Brown	6	3
9	Unisex T-Shirt in Green	T-Shirt	Green	6	3
10	Unisex T-Shirt in Yellow	T-Shirt	Yellow	6	3
11	Unisex T-Shirt in Blue	T-Shirt	Blue	6	3
12	Unisex T-Shirt in Purple	T-Shirt	Purple	6	3
13	Unisex T-Shirt in Navy	T-Shirt	Navy	6	3
14	Unisex T-Shirt in Aqua	T-Shirt	Aqua	6	3
75	White Alpha V2 Unisex T-Shirt for Special Comfort	T-Shirt	White	10	6.5
76	Grey Alpha V2 Unisex T-Shirt for Special Comfort	T-Shirt	Grey	10	6.5

1. Missing colors

The missing color are found from the name of the product, the name of the column is split into 2 with the right most delimiter is split with the use of space. This would give the color of each product. Then using 'If' function the columns can merged with the complete data.

PRODUCT_ID	PRODUCT_NAME	PRODUCT_CATEGORY	PRODUCT_COLOUR	PRICE_PER_UNIT	COST	MISSING_COLOUR	PRODUCT_COLOUR_FULL
54	Unisex Polo Shirt in Purple	Polo Shirt	Purple	15	7	Navy	Navy
55	Unisex Polo Shirt in Aqua	Polo Shirt	Aqua	15	7	Aqua	Aqua
103	Alpha V2 Polo Shirt for Special Comfort in White	Polo Shirt	White	22	15	White	White
104	Alpha V2 Polo Shirt for Special Comfort in Grey	Polo Shirt	Grey	22	15	Grey	Grey
105	Alpha V2 Polo Shirt for Special Comfort in Yellow	Polo Shirt	Yellow	22	15	Yellow	Yellow
106	Alpha V2 Polo Shirt for Special Comfort in Blue	Polo Shirt	Blue	22	15	Blue	Blue
107	Alpha V2 Polo Shirt for Special Comfort in Purple	Polo Shirt	Purple	22	15	Purple	Purple
108	Alpha V2 Polo Shirt for Special Comfort in Navy	Polo Shirt	Navy	22	15	Navy	Navy
109	Alpha V2 Polo Shirt for Special Comfort in Aqua	Polo Shirt	Aqua	22	15	Aqua	Aqua
56	Cardigan Fake Knitted White	Cardigan	White	30	17.5	White	White
57	Cardigan Fake Knitted Grey	Cardigan	Grey	30	17.5	Grey	Grey
58	Cardigan Fake Knitted Brown	Cardigan	Brown	30	17.5	Brown	Brown
59	Cardigan Fake Knitted Green	Cardigan	Green	30	17.5	Green	Green
60	Cardigan Fake Knitted Yellow	Cardigan	Yellow	30	17.5	Yellow	Yellow
61	Cardigan Fake Knitted Blue	Cardigan	Blue	30	17.5	Blue	Blue
62	Cardigan Fake Knitted Purple	Cardigan	Purple	30	17.5	Purple	Purple
63	Cardigan Fake Knitted Navy	Cardigan	Navy	30	17.5	Navy	Navy
64	Cardigan Fake Knitted Aqua	Cardigan	Aqua	30	17.5	Aqua	Aqua
65	Bomber Jacket White	Jacket	White	40	25	White	White
66	Bomber Jacket Grey	Jacket	Grey	40	25	Grey	Grey
67	Military Jacket Black	Jacket	Black	40	25	Black	Black
68	Red V1 Bomber Jacket	Jacket	Red	40	25	Jacket	Red
69	Sunlight V1 Bomber Jacket	Jacket	Orange	40	25	Jacket	Orange
70	Tan V1 Bomber Jacket	Jacket	Brown	40	25	Jacket	Brown
71	Military Jacket Green	Jacket		40	25	Green	Green
72	Military Jacket Navy	Jacket		40	25	Navy	Navy
73	Military Jacket Blue	Jacket		40	25	Blue	Blue
74	Bomber Jacket Aqua	Jacket		40	25	Aqua	Aqua

2. Correcting error values

Some error values were identified in the dataset, as well as some missing entries. These discrepancies were resolved by referring to the cost and price information in the transaction table, which allowed for the correction of erroneous values. It is important to note that these corrections were made solely to enhance the overall data quality and were not utilized in the analysis for this report.

These methods were adopted only to improve the overall data, these data are not used in the analysis of this report.

Data Presentation

Shareholder's report:

Overall sales and profits for the year

To provide a comprehensive overview of the year's sales and profits, line graphs were utilized to represent the time series analysis on a monthly basis. The drill-down function enhances this visualization, allowing for detailed weekly and monthly profit and sales insights.

Detailed Analysis of Various Product Categories

The funnel chart illustrates the production volume across six distinct product categories, offering an ideal representation of their quantities. Additionally, a column chart combined with a line graph representing profit was used. This visualization compares the sales and costs of each category, effectively highlighting the most and least profitable and cost-efficient products.

Revenue Breakdown of Countries

To analyse the geographical distribution of profits, a graph showcasing the top 10 countries by profit was created. Both a world map and a tree map were employed to visualise the profits and sales figures for each country, providing a clear comparative analysis.

Air Shipment Reduction Achievement

Given the time series nature of this data, a line graph was employed to illustrate the monthly exclusive air shipment data from July 1, 2023, onward. The data was divided into two segments to clearly demonstrate the impact of the initiative. A column chart with the new 'Sustainability Status' feature was used to further represent this difference. Additionally, another column chart displaying the monthly profits filtered by air shipment logistics was included to showcase the profit generated from these shipments.

Sales report:

Since the report is formatted in a black and white printout, highly contrasting colours are taken to make the visual more understandable and clear.

Salesperson Performance: Profit and Revenue Overview

A column chart is utilised to display the profit and total revenue generated by each salesperson. This visualization highlights the performance of individual sales team members, allowing for an easy comparison of their contributions to the company's overall profitability.

New Customer Acquisition in 2023

A column chart displays the sales ID along with their respective new customers and the total sales generated by them in 2023. This visualisation focuses on the ability of salespeople to acquire new customers, a critical metric for growth.

Profit Breakdown by Salesperson and Product Category

A stacked column chart is used to show the profit generated by each salesperson, broken down by product category. This detailed view highlights which products contribute most to the profitability of each salesperson.



UNIVERSAL EXPORT

BRIEF OVERVIEW OF UNIVERSAL EXPORT'S OPERATIONS IN 2023

Report 1

This report is crafted to offer our esteemed shareholders a detailed insight into the performance and strategic direction of Universal Export, with a particular focus on key areas of interest and significance. Throughout this report, we aim to highlight notable achievements, challenges, and strategic initiatives undertaken by Universal Export during the reporting period. From an analysis of sales and profit trends to an exploration of product portfolio strengths and weaknesses, our objective is to provide shareholders with actionable insights that reflect our commitment to delivering sustainable value and growth.

Part 2: External-Facing Report for Shareholders

Topic Highlights

2023 Highlights

- Overview of business operations in 2023
- Snapshot of overall sales and profits for the year
- Detailed analysis of various product categories
- Sales performance across different countries
- Results of the initiative to reduce exclusive air shipments from July 1, 2023, to December 31, 2023



1040M

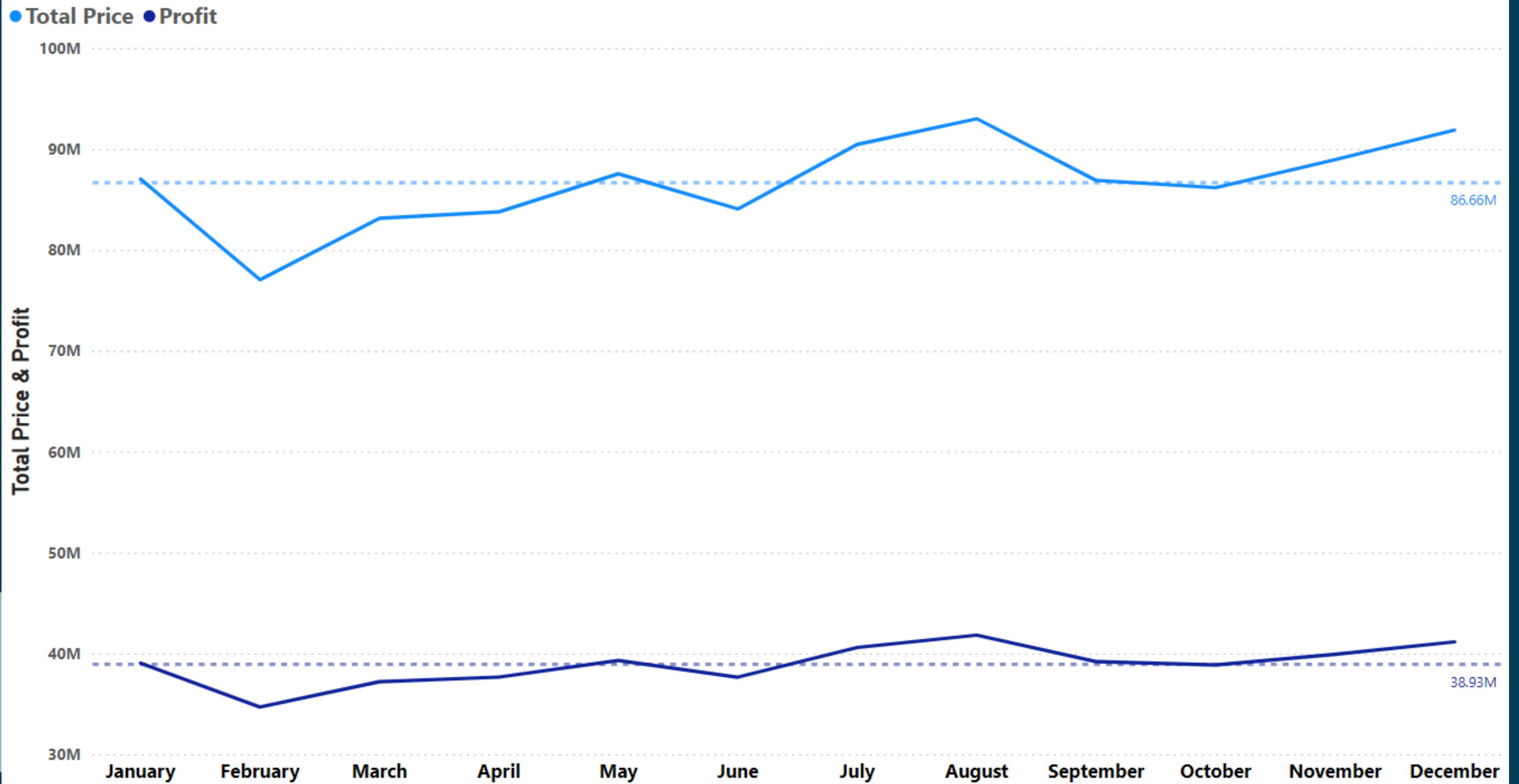
REVENUE IN 2023

467M

PROFIT IN 2023

OVERALL SALES AND PROFITS FOR THE YEAR

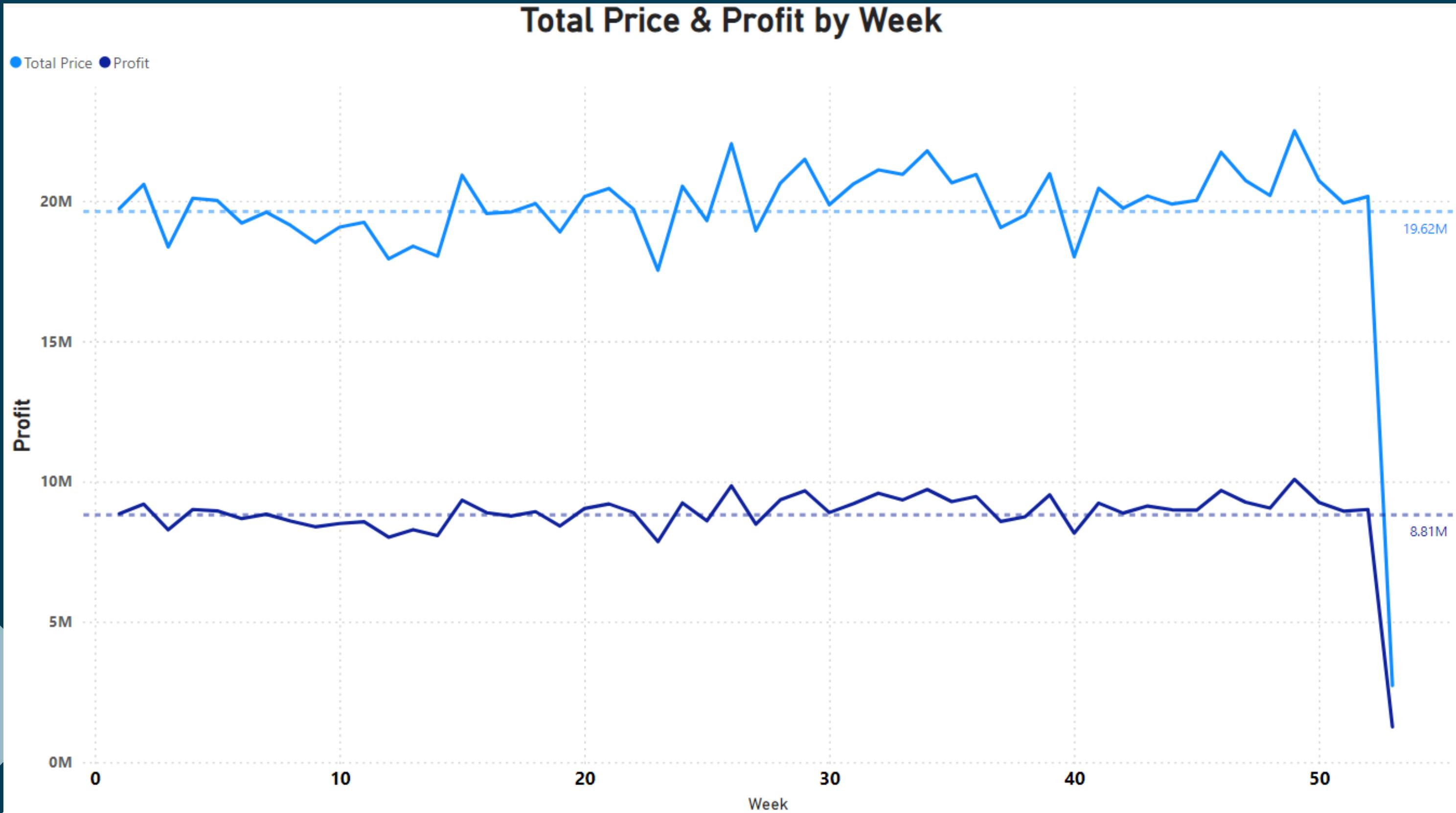
Total Price & Profit by Month



OVERVIEW

Total Sales and Profit for 2023: Universal Export achieved significant sales growth with a total revenue of £1040 million and a net profit of £467 million.

OVERALL SALES AND PROFITS FOR THE YEAR

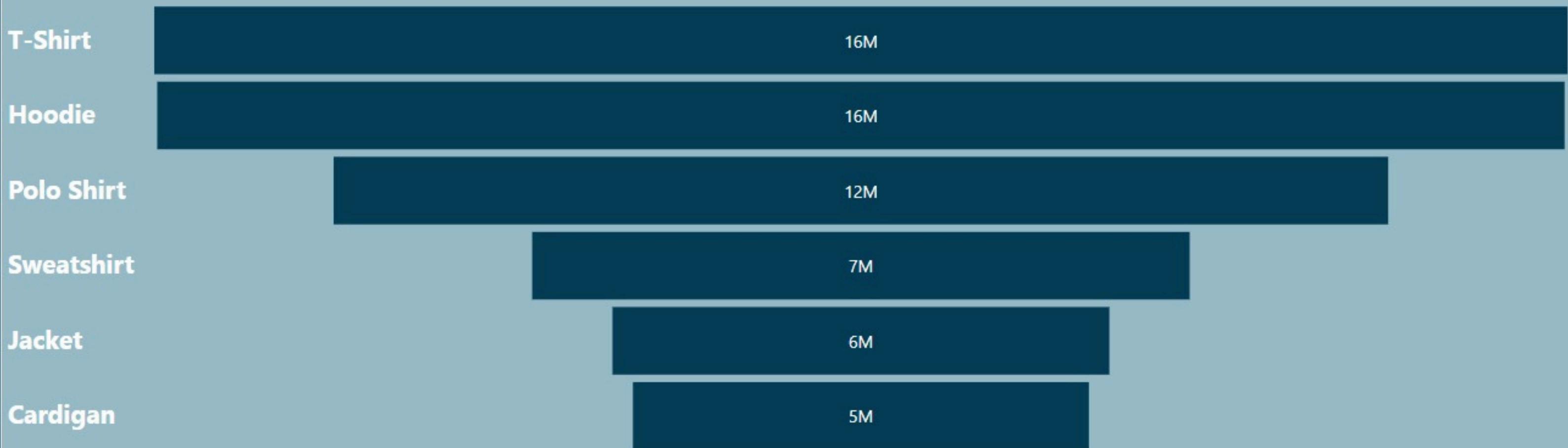


OVERVIEW

Sales Trends: The months of August and December were particularly strong, with peak sales weeks being 26 and 49. The following graph illustrates the monthly and weekly sales trends.

Detailed Analysis Of Various Product Categories

Product Category Sales Volume



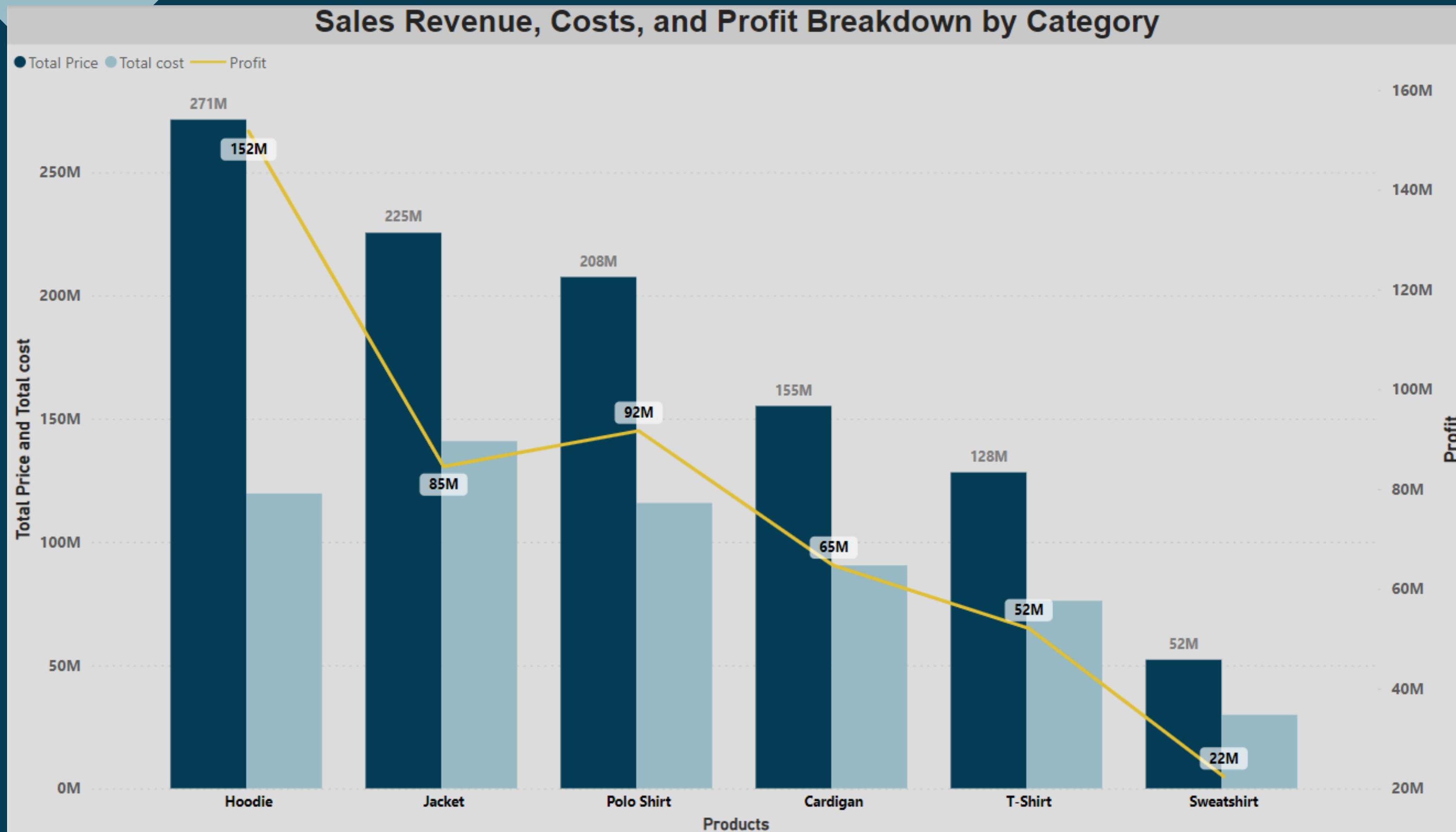
TOP PRODUCTS

T- Shirts and Hoodies are the most ordered products with each having 16 Million orders.

KEY HIGHLIGHT

Jackets, while lower in volume, generate substantial revenue and profit, indicating a higher price point and value perception.

Product Category Financial Overview



OVERVIEW

Hoodies and polo shirts have demonstrated exceptional profitability, with significantly higher profit margins compared to their costs.

Jackets have less cost to profit ratio

KEY INDICATORS



Strengths:

Hoodies: High sales volume, revenue, and profit margins make these categories the standout performers.

Polo Shirts: Strong performance in both volume and profitability.

Jackets: High revenue with moderate profits, indicating a premium product category.

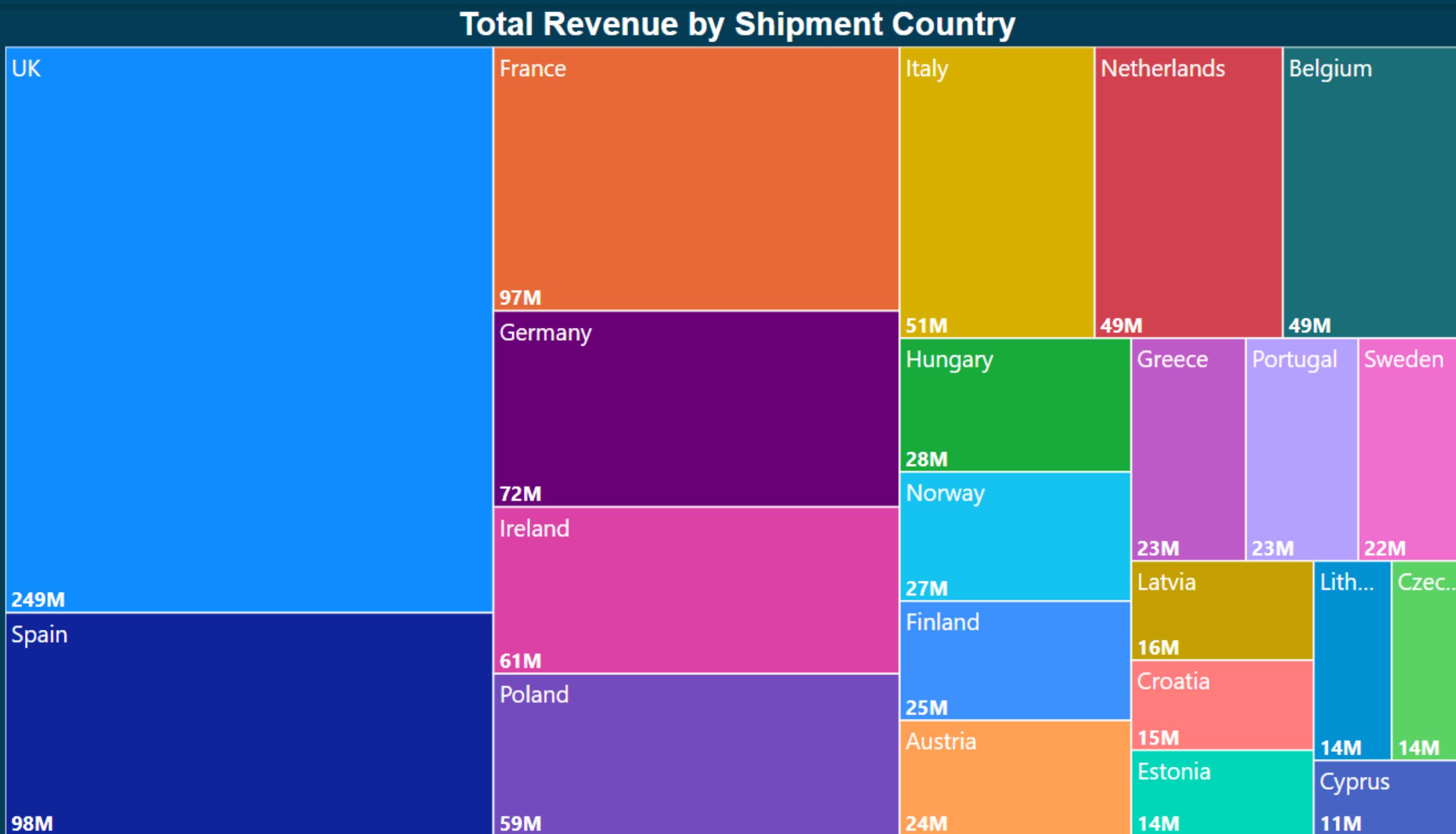
Weaknesses:

Sweatshirts & Cardigans : Lower sales volume and revenue, though still profitable, suggesting potential areas for growth and marketing focus.

T-Shirts: Compared to the quantity sold this category does have a high profit margin. More focused strategy to improve product's overall profitability.



Revenue Breakdown Of Countries

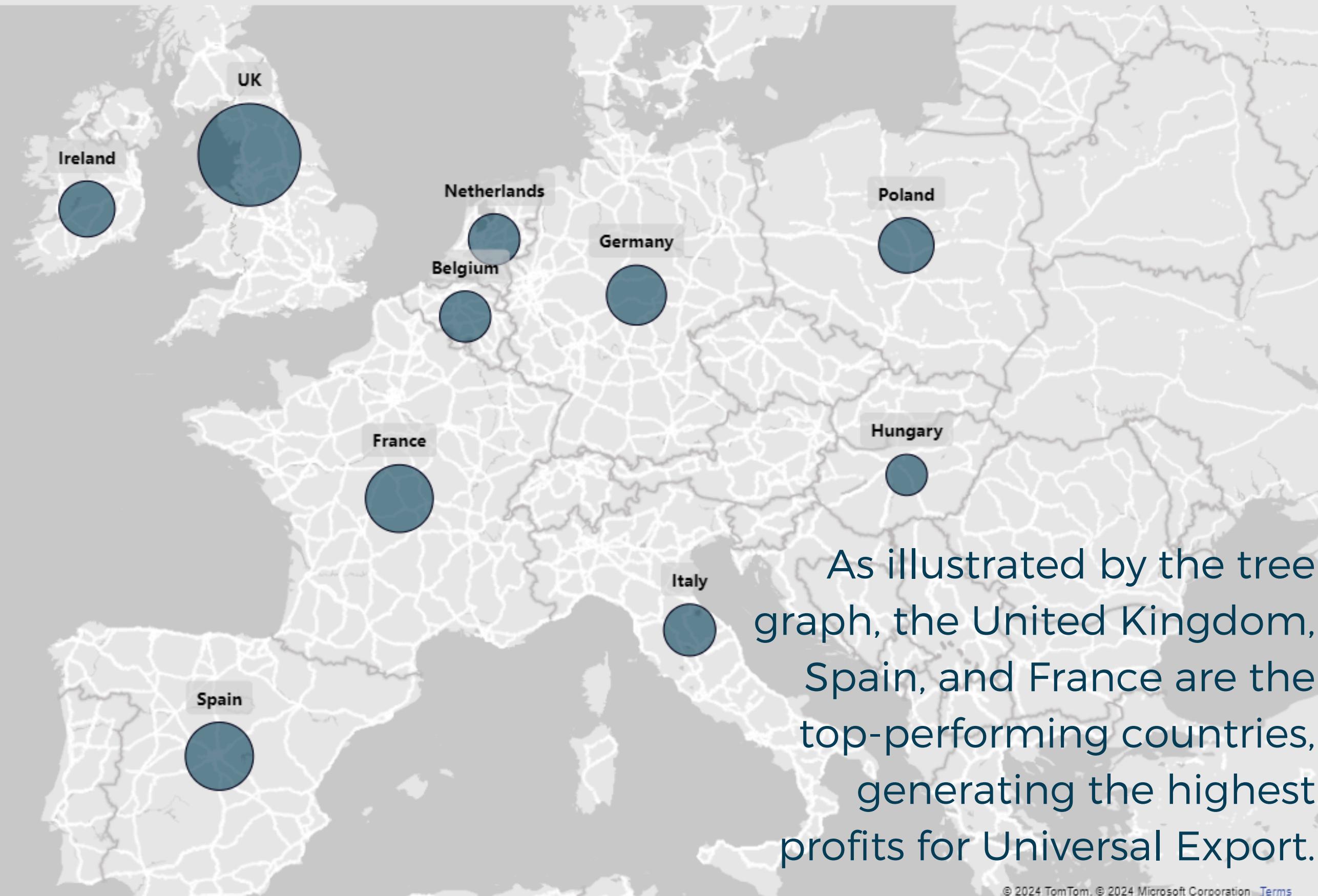


OVERVIEW

The tree graph highlights the United Kingdom, Spain, and France as the top-performing countries in sales. The UK leads with £249 million, followed by Spain with £98 million, and France closely behind with £97 million.

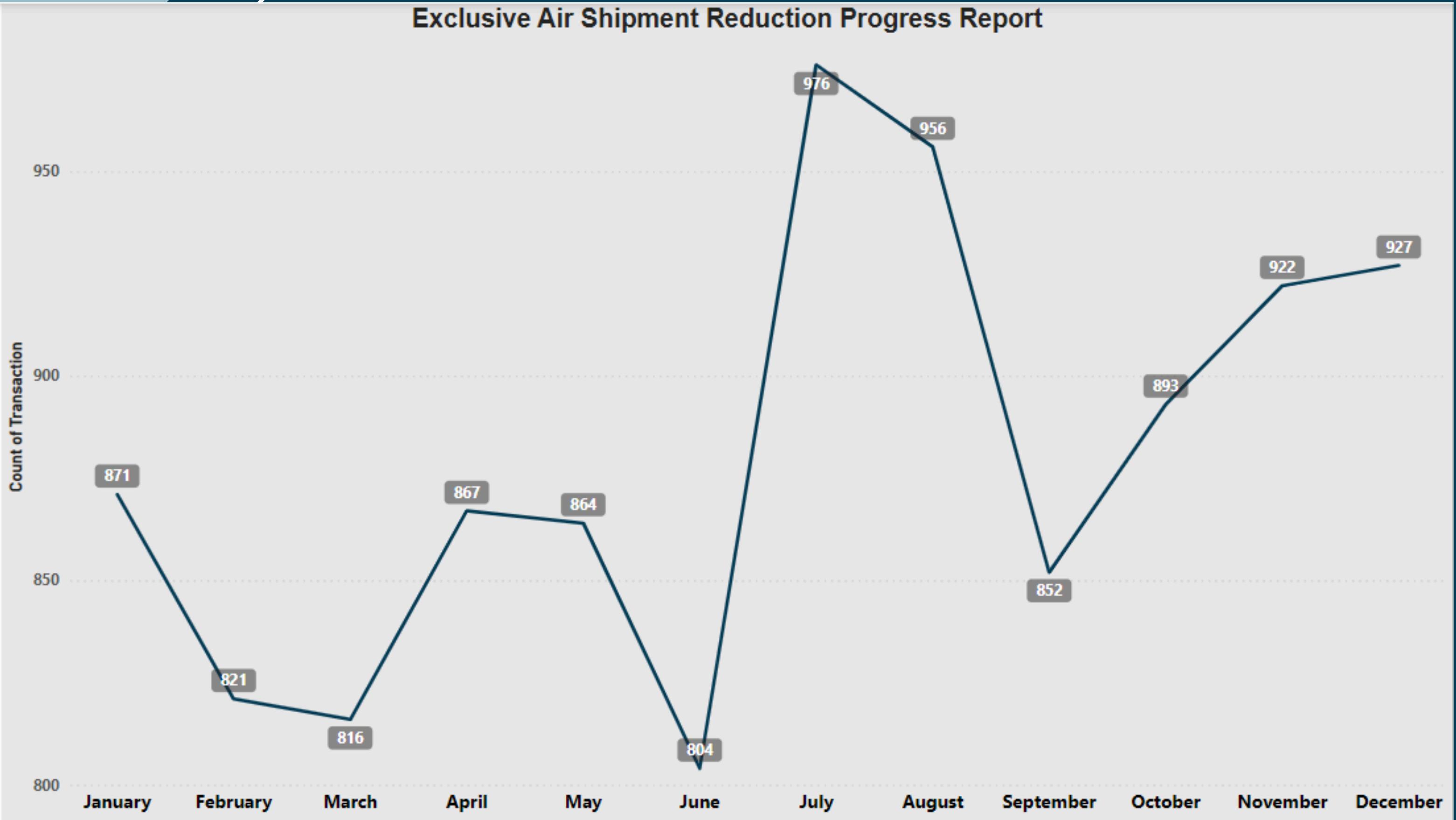
Top 10 Countries to their Profits

Profit Distribution by Country



Air Shipment Reduction Achievement

Exclusive Air Shipment Reduction Progress Report



OVERVIEW

Despite the initial increase in July and August, which may be attributed to transitional adjustments or unforeseen operational needs, the subsequent months show a noticeable decline, averaging 921 transactions per month.

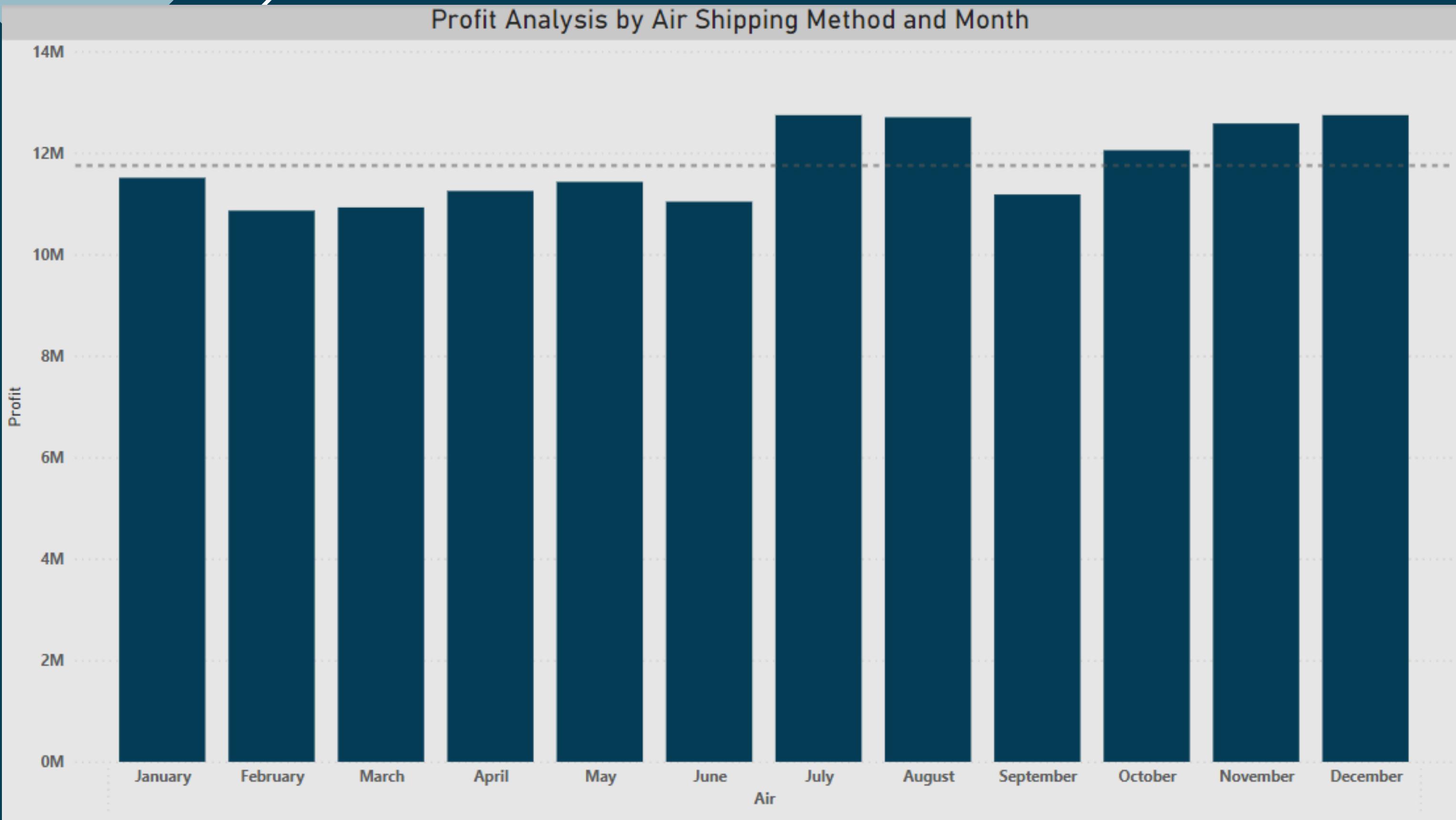
Air Shipment Reduction Achievement



OVERVIEW

As illustrated, there has been a 10% increase in the number of air shipments despite our commitment to reduce their use. Moving forward, continuous monitoring and adjustment of logistics strategies will be essential to sustain and further this progress.

Air Shipment Reduction Achievement



OVERVIEW

Despite the increased number of air shipments, profit margins have not decreased; in fact, there has been an increase in profit. The reference line in the chart indicates the average profit.

KEY FINDINGS

SALES BY WEEK AND MONTH

We perform best in the months of August and December, with the best sales weeks being 26 and 49.

TOP PRODUCTS

Our top products are hoodies, polo shirts, and cardigans, even though jackets show more profit when compared with cost; other products perform better overall.

TOP COUNTRIES

The UK, Spain, and France are the top countries in terms of sales and profit, with the UK being the top performer.

SUSTAINABILITY COMMITMENT

When compared with the data from July to December, the sustainability commitment has not been successful. However, the usage has shown slightly better profit.



Thank you

Report 2

INTERNAL-FACING REPORT ON SALESPeOPLE
PERFORMANCE



A G E N D A

- Profit and Revenue Analysis by Salesperson
- New Customer Acquisition in 2023
- Profit Analysis by Product Category and Salesperson
- Conclusion

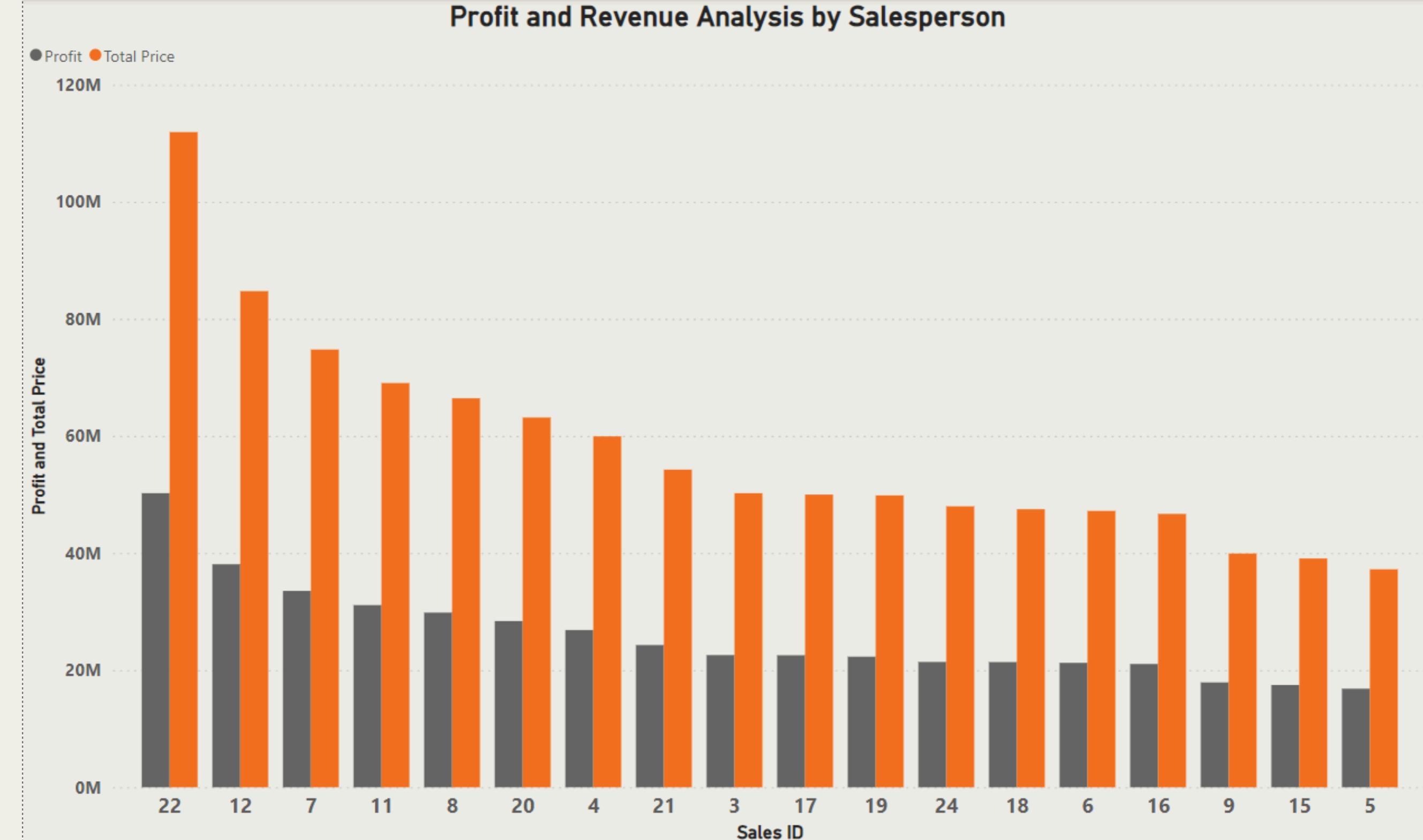


SALESPERSON PERFORMANCE: PROFIT AND REVENUE OVERVIEW

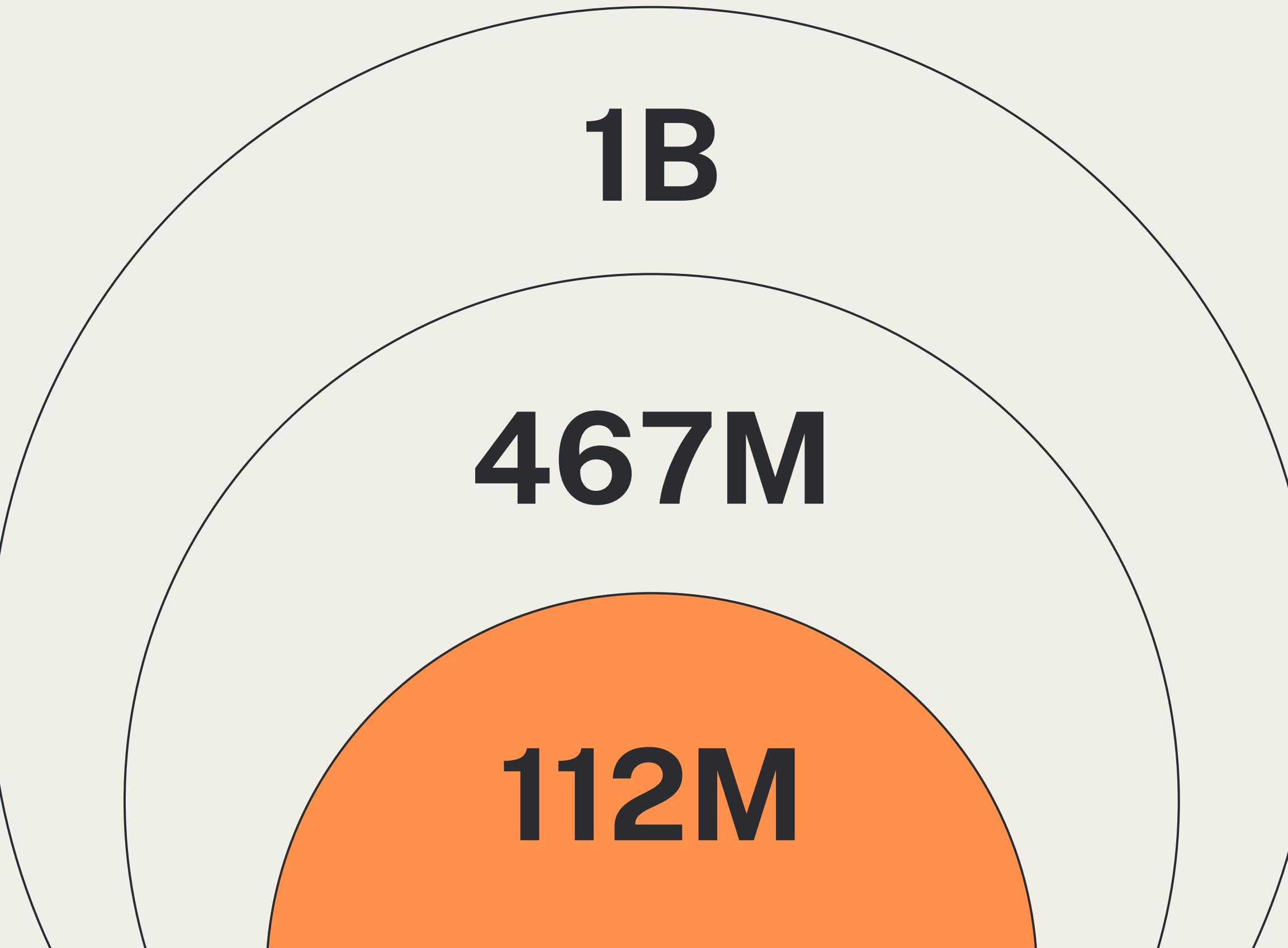
The salesperson with Sales ID 22 stands out as the top performer, generating the highest revenue at over 100M and the highest profit exceeding 40M.

Salesperson 12 and 7 follow, showing significant contributions to revenue, both around 80M, and substantial profits close to 30M.

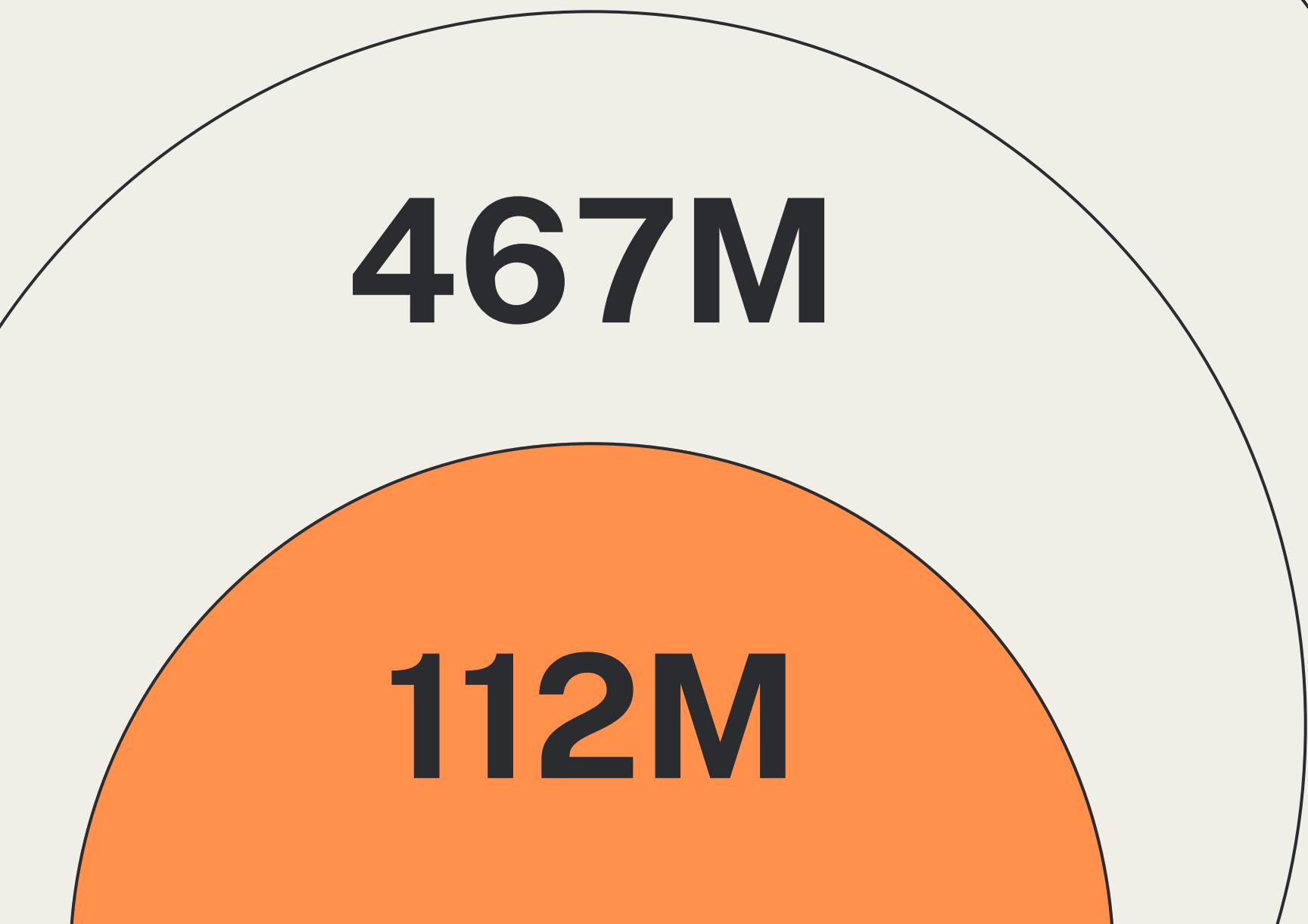
Profit and Revenue Analysis by Salesperson



TOP PERFORMER



1B



467M



112M

Total Sales

We had around 1 billion total revenue in this financial year

Total Profit

With around 467 Million in profits.

Top Performer

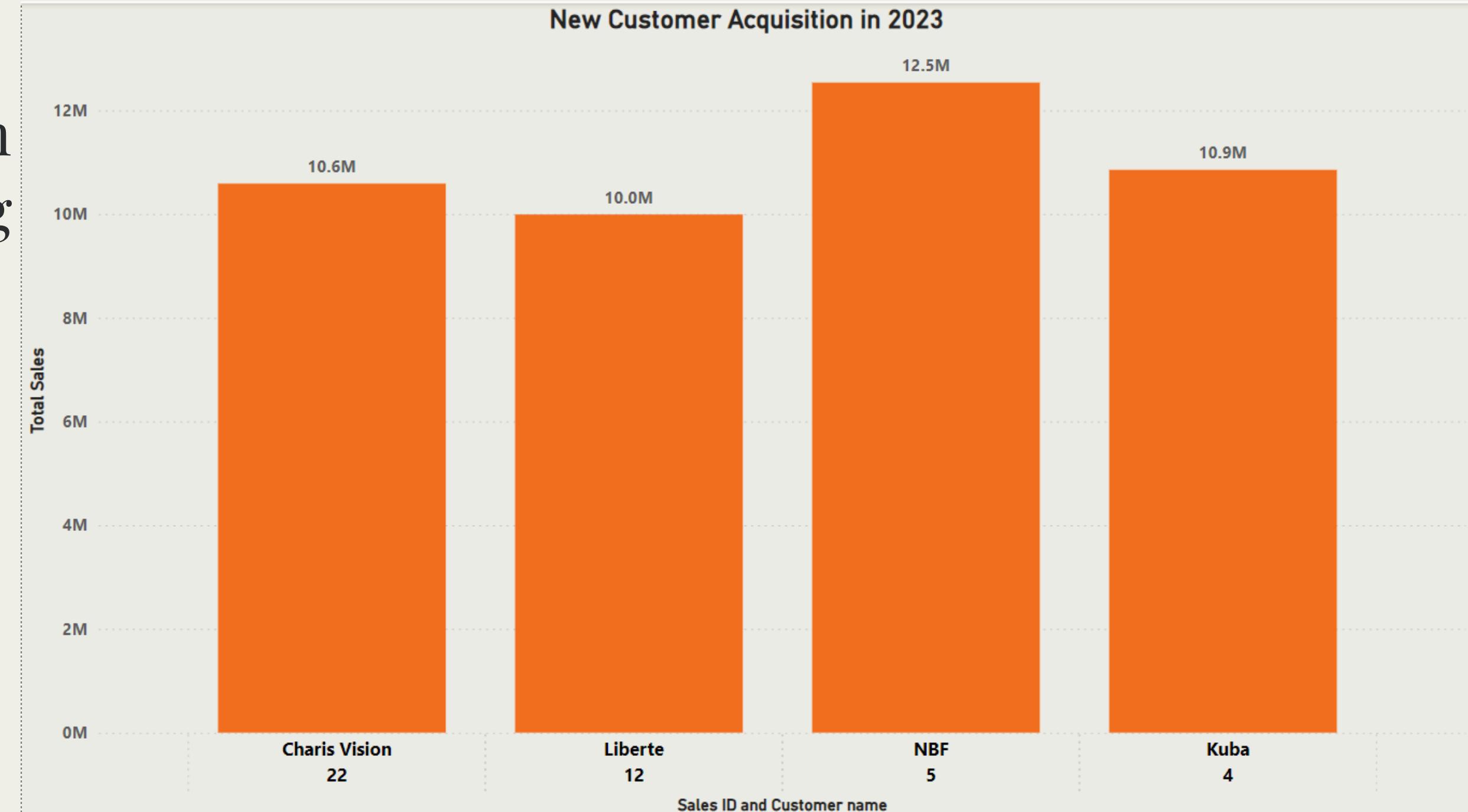
Around which the top performer of the year achieved around 112 million in sales and around 50 Million in profits.



NEW CUSTOMER ACQUISITION IN 2023

Sales ID 5 (NBF) achieved the highest total sales from new customers, amounting to 12.5M.

Sales ID 4 (Kuba) followed closely with total sales of 10.9M



OVERALL REVIEW

NBF

Sales ID : 5

This indicates strong performance in acquiring and onboarding new clients. Highest total sales from new customers.

But considering the overall performance through the year, Sales ID 5 has not been the best choice

Kuba

Sales ID 4

Even though the demonstrating significant success in attracting new business. Through the year the performance does not match the others.

Charis Vision

Sales ID 22

Generating 10.6M with the newly acquired sales and out performing through the year with 112 million revenue with 50 million profits.
Sales ID 22 has an overall strong performance.

Liberte

Sales ID 12

Generating 10.0M and coming second to Sales ID 22 in overall sales performance, Sale ID 12 has done strong as well.

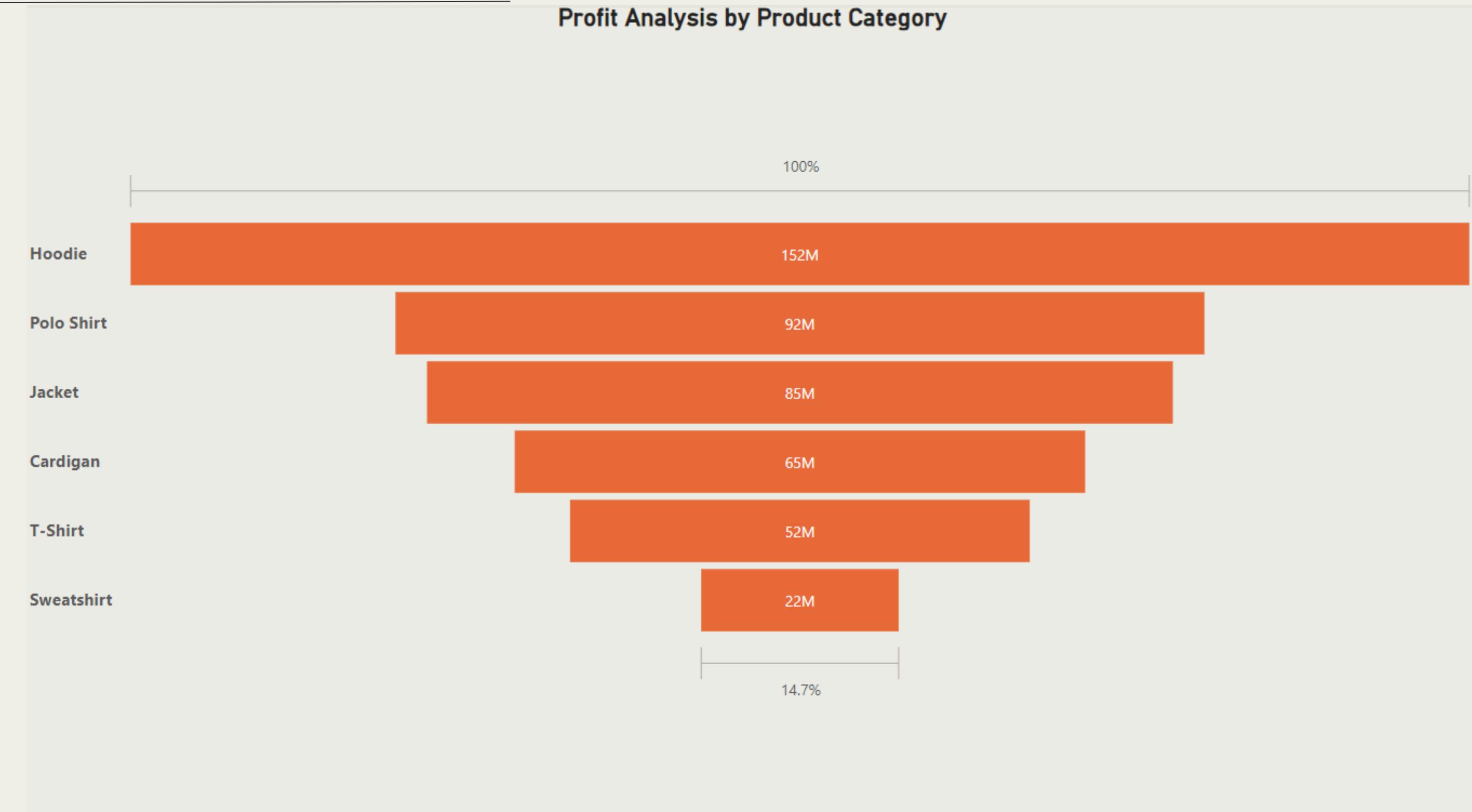


**UNIVERSAL
EXPORTS**

PROFIT BREAKDOWN BY SALESPERSON AND PRODUCT CATEGORY

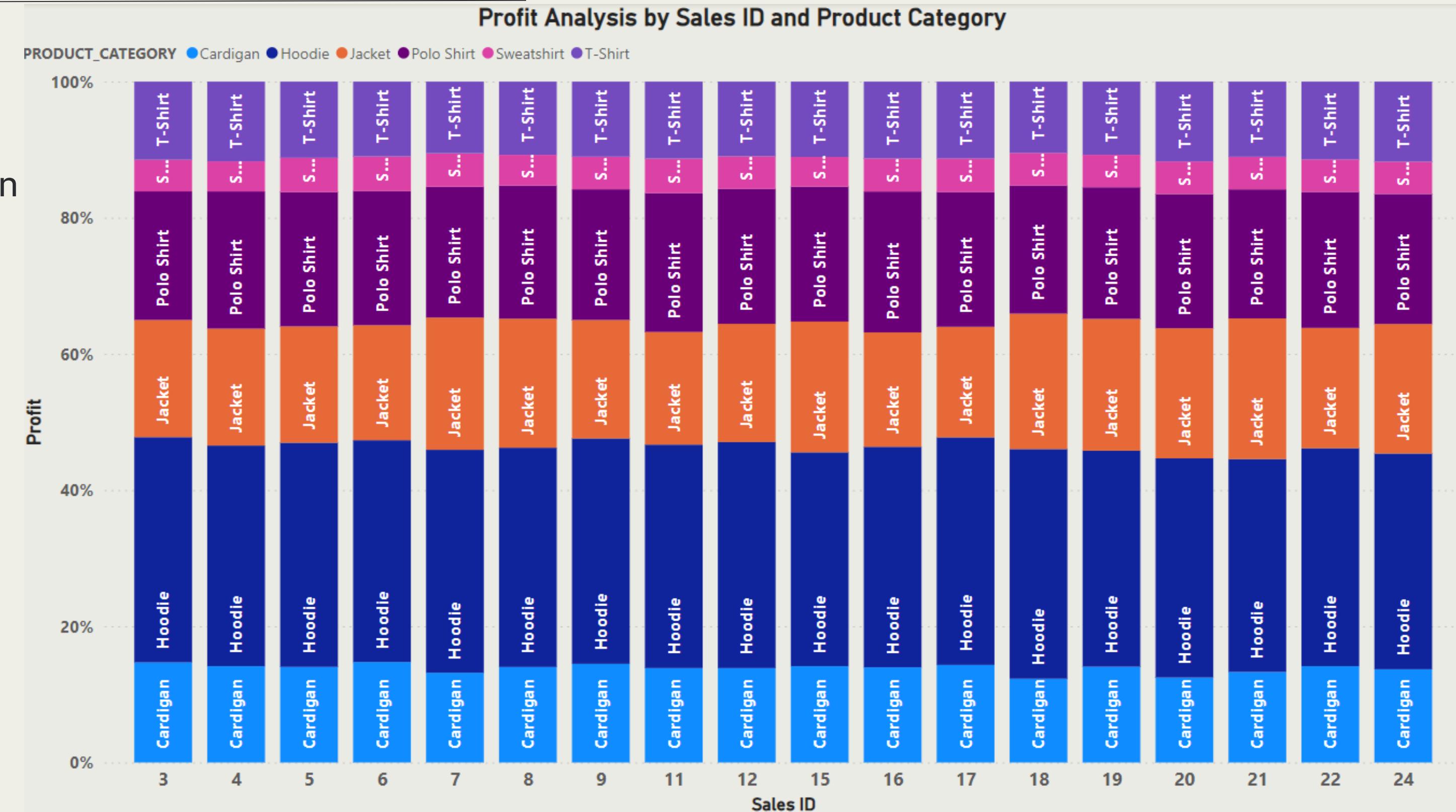
It is evident from the graph that Hoodies constitute the highest profit, totalling 152 million among the six categories, significantly outperforming other categories. In comparison, Sweatshirts rank the lowest in terms of profit generation.

Profit Analysis by Product Category



PROFIT BREAKDOWN BY SALESPERSON AND PRODUCT CATEGORY

Hoodie, Jacket and Polo Shirt consistently represent a large portion of the profit across all salespeople. These categories are the most profitable, indicating that they should be a focal point for sales strategies.



TOP SALES PERFORMANCE

Sales ID: 22

has a total of 112 million in sales

Profit

50 Million

Total Customers

Total of 6 customer from 2007

Sales ID: 12

has a total of 85 million in sales

Profit

38 Million

Total Customers

Total of 4 customer from 2006



Thank you!

