

Data-Driven Storytelling Presentation:

Impactful Sales Insights: Driving Growth at JPMorgan Chase & Co.

A Comprehensive Analysis of Account Sales Performance (2017-2021)

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Elevating Performance: A Five-Year Journey of Growth

Briefly introduce the consistent growth in sales over the past five years, focusing on the 51.77% AVG 5yr CAGR.



INTRODUCTION

Problem Statement

- ✓ **J.P. Morgan Chase & Co.** is a prominent global financial services firm providing a wide range of services and operating internationally.
- ✓ The company seeks to evaluate the account performance metrics over the past five years (2017-2021) and identify the factors contributing to the compound annual growth rate (CAGR) in unit sales. This involves pinpointing opportunities for further enhancement.

Business Questions

- Reviewing the overall unit sales for each year.
- Assessing the year-over-year growth in sales.
- Determining which account types are outperforming others in terms of unit sales.
- Calculating the average 5-year compound annual growth rate (CAGR) for various account types.
- Identifying the top-performing and bottom-performing accounts.

Steps 1: Data Transformation

- ✓ Using the **Power Query tool in Excel**, we will extract relevant columns for account information, product sales volumes, and marketing programs and create a structured table with useful columns for efficient analysis.

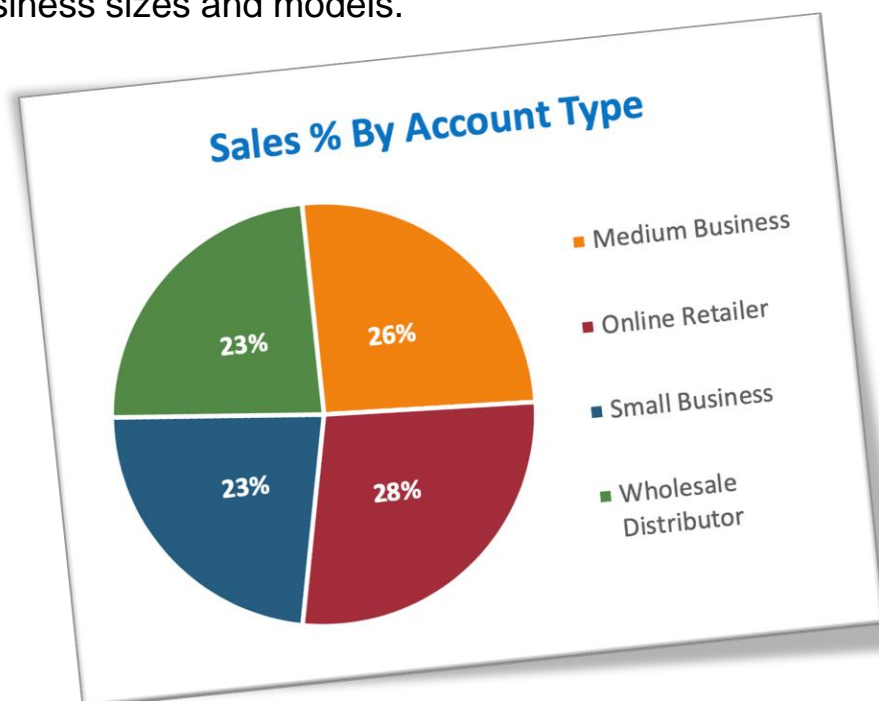
The screenshot shows an Excel spreadsheet with the following data:

Account Name	Account Address	Decision Maker	Phone Number	Account Type	Product 1	Product 2	Product 3	Social Media	Coupons	Catalog Inclusion	Posters	2017	2018	2019	2020	2021	5 YR CAGR
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1982	5388	7063	7208	9093	46%
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	2786	3804	4121	6210	6909	25%
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1209	1534	1634	4302	9768	69%
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	906	1251	2897	4499	9428	80%
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	1421	1893	2722	4410	5873	43%
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	2341	6105	7777	7891	8758	39%
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	9252	8499	991	448	211	-61%
SB 8	8735 Squaw Creek Drive, Brooklyn NY 11214	Juanita Wisocz	(305) 531-1310	Small Business	Yes	No	Yes	No	No	Yes	No	1581	4799	6582	9024	9759	58%
SB 9	267 Third Road, New York NY 10034	Velma Riley	(697) 543-0310	Small Business	Yes	No	No	No	No	Yes	No	9766	8049	5556	5202	2373	-30%
SB 10	102 Coffee Court, Bronx NY 10461	Holly Gaines	(277) 456-4626	Small Business	Yes	Yes	No	Yes	No	Yes	No	1530	1620	2027	4881	6002	41%
SB 11	44 W. Pheasant Street, Brooklyn NY 11233	Gary Brown	(459) 968-9453	Small Business	Yes	No	No	No	No	No	No	7555	6551	5188	3436	2359	-25%
SB 12	7488 N. Marconi Ave, Brooklyn NY 11237	Jeffrey Akins	(313) 417-8968	Small Business	Yes	No	No	No	No	No	No	1532	2678	4068	4278	5382	37%
SB 13	9575 Shipley Court, Brooklyn NY 11201	Tim Young	(876) 653-1727	Small Business	Yes	No	Yes	Yes	Yes	Yes	Yes	24	1797	3548	3668	8592	335%
SB 14	8156 Lake View Street, New York, NY 10025	Debra Kroll	(628) 832-4986	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	861	1314	1810	6510	9271	81%
SB 15	44 Madison Dr, New York NY 10032	Kelly Boyd	(220) 928-0797	Small Business	Yes	Yes	No	No	No	No	No	9058	4839	4776	4024	369	-55%
MB 1	9848 Linden St, New York NY 10011	Dan Hill	(248) 450-0797	Medium Business	Yes	Yes	No	No	No	No	No	3501	7079	7438	7443	9225	27%
MB 2	805 South Pilgrim Court, Brooklyn NY 11225	Javier George	(964) 214-3742	Medium Business	Yes	Yes	No	No	No	No	No	3916	4218	5072	5201	7588	18%
MB 3	9132 Redwood Rd, Bronx NY 10466	Christopher Evans	(831) 406-6300	Medium Business	Yes	Yes	No	Yes	No	Yes	No	700	5721	6247	8495	9236	91%
MB 4	3 Warren Drive, New York NY 10040	Julie Ross	(778) 387-0744	Medium Business	Yes	Yes	No	No	No	No	No	9773	9179	8390	8256	3815	-21%
MB 5	402 Bridgeton Lane, Bronx NY 10468	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	73	3485	4592	5143	8100	225%
MB 6	6 E. Nichols Ave, New York NY 10027	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	238	1235	1822	7074	8207	142%
MB 7	323 North Edgewood St, Bronx NY 10457	Charlotte Leroux	(784) 634-6873	Medium Business	Yes	Yes	No	Yes	No	Yes	No	1368	3447	4535	5476	9983	64%
MB 8	484 Thorne St, New York NY 10128	Nina Coulter	(938) 752-9381	Medium Business	Yes	No	No	No	Yes	No	No	8331	7667	9592	1998	375	-54%
MB 9	861 Gonzales Lane, Bronx NY 10472	Mia Ang	(253) 861-1301	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	1779	2124	2844	6877	9570	52%
MB 10	267 Randall Mill Dr, New York NY 10033	Kathy Rogers	(939) 738-6471	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	570	1322	7279	8443	9571	102%
MB 11	12 Lees Creek St, Brooklyn NY 11211	Rita Varga	(754) 696-3109	Medium Business	Yes	No	No	No	Yes	No	No	6156	6110	5791	1759	969	-37%
MB 12	240 W. Manhattan St, Bronx NY 10462	Mel Berkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	209	621	3098	7118	8433	152%
MB 13	62 Lower River Road, Staten Island, NY 10306	Debra Martin	(743) 960-6716	Medium Business	Yes	Yes	No	No	No	No	No	6309	6227	5123	4968	3857	-12%
MB 14	48 S. Brandywine St, New York NY 10002	Deshaun Fletcher	(845) 304-6511	Medium Business	Yes	Yes	No	Yes	No	Yes	No	712	4182	6087	7494	8599	86%
MB 15	5 Tallwood St, Brooklyn NY 11233	Karl Lenz	(886) 554-5339	Medium Business	Yes	Yes	No	No	No	No	No	2390	2415	3461	3850	4657	18%
OR 1	77 Stillwater St, Brooklyn NY 11213	John Mackey	(831) 581-1892	Online Retailer	Yes	Yes	Yes	No	No	Yes	No	2519	3938	5190	8203	8780	37%
OR 2	7061 Bishop St, Yonkers NY 10701	Raymond Heywin	(571) 843-1746	Online Retailer	Yes	Yes	Yes	Yes	Yes	Yes	No	138	286	6750	8254	8656	181%
OR 3	7223 Cedarwood Ave, Brooklyn NY 11221	Janie Roberson	(924) 516-6566	Online Retailer	Yes	Yes	Yes	No	No	Yes	Yes	8873	8484	7883	7499	6592	-7%
OR 4	62 Lafayette Ave, Bronx NY 10462	Brooke Hayes	(247) 999-3394	Online Retailer	Yes	Yes	Yes	No	No	Yes	Yes	3297	4866	4928	8451	9585	31%

Sales Distribution by Account Type

We observe Our sales distribution across various account types illustrates a balanced market penetration, with each segment contributing significantly to our overall sales:

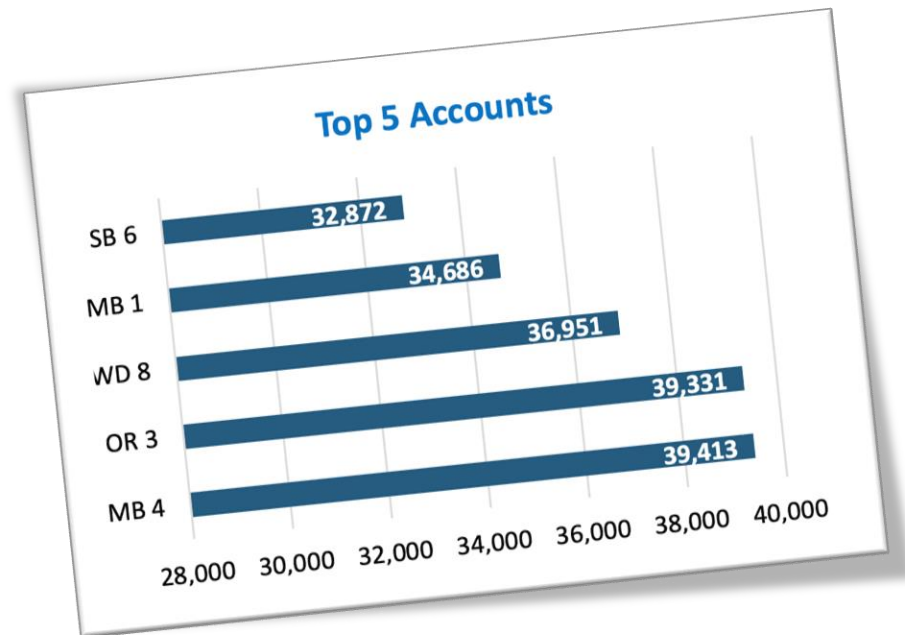
- ❑ **Medium Business:** Leading with 26%, highlighting strong relationships in this segment.
- ❑ **Online Retailer:** Close behind at 28%, reflecting our robust presence in the e-commerce space.
- ❑ **Small Business and Wholesale Distributor:** Each holds 23%, demonstrating our broad appeal across different business sizes and models.



Strategic Focus on Top Accounts

This bar graph showcases our top five accounts, each a leader in their respective sectors, highlighting significant sales contributions:

- ❑ **MB 4 & OR 3:** Lead with nearly 40,000 units each, demonstrating robust performance in medium businesses and online retail.
- ❑ **WD 8:** A key wholesale distributor with over 36,000 units, vital for our supply chain strength.
- ❑ **MB 1 & SB 6:** Other medium and small businesses show strong sales, emphasizing our diverse market penetration.



Year-over-Year Growth Trends

This graph illustrates the Year-over-Year (YoY) sales growth from 2017 to 2021, highlighting our company's ability to sustain growth over a five-year period.

- ❑ **2017-2018:** We see a steady increase in sales, setting a strong foundation for growth.
- ❑ **2019:** A significant spike in growth, indicating successful market expansions or product launches.
- ❑ **2020:** A slight dip possibly due to market challenges, yet our overall trajectory remains positive.
- ❑ **2021:** A robust recovery with sales soaring to nearly 5 million units, showcasing our resilience and strategic adaptability.



Summary and Strategic Recommendations

Summary:

Over the past five years, our sales analysis reveals a robust growth trajectory, with significant contributions from diverse account types and top-performing accounts. Despite minor fluctuations, our Year-over-Year growth showcases a pattern of resilience and strategic adaptability, positioning us strongly in the market.

Recommendations:

☐ **Enhance Focus on High-Performing Accounts:**

Strengthen relationships and customize offerings for the top 5 accounts to maximize sales and loyalty.

☐ **Expand Market Share in Underutilized Sectors:**

Increase penetration in the wholesale distributor and small business sectors, leveraging tailored marketing strategies to meet their unique needs.

☐ **Invest in Data Analytics:**

Continue to refine our sales strategies through advanced analytics, ensuring we adapt dynamically to market trends and customer preferences.

☐ **Resilience and Adaptability:**

Enhance operational flexibility to maintain growth momentum and manage market disruptions effectively, as evidenced by our recovery in 2021.

Thank you for your attention and consideration.