

Project Title: Superstore Sales Performance using Tableau.

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Visualization Tool Used: Tableau Desktop Public (Free Edition)

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Introduction

This project aims to analyse the sales performance of Superstore using Tableau with the help of a dataset. The objective of this project is to take data-driven decision-making by providing clear visual insights using Tableau. The dataset given is an excel file named as Sample-Superstore. The main goal is goal to analyse this dataset and provide actionable insights through interactive Dashboard.

The sample superstore dataset has columns like row id, order id, order date, ship date, ship mode, customer id, customer name, segments, country, city, state, postal code, region, product id, category, sub-category, product name, sales, quantity, discount, profit. Eight views and a dashboard are to be made to analyse these columns through visualization. Questions related to this project are mentioned in question folder.

This project provides insights that can drive growth and increase profitability.

Problem Statement

The sales management needs insights about sales performance across region, state, segments, category, and sub-category. This report aims to identify sales trends, top n states by sales and areas of improvement using visualisation with the help of Tableau. The sales team needs to maintain a regular check on total sales, total profit, total volume and sales per customer as a scorecard. The sales management team needs all views with filter and scorecard in a dashboard.

There are eight views, four scorecards and a dashboard. The charts used are bar chart, pie chart, bubble chart, and line chart.

Note: All the questions, instruction, business requirements, project requirements, and formatting requirements are mentioned in a folder named as

question. Please check the question folder for detail instruction about the project.

Data Description

The dataset named as Sample-Superstore is an excel file. The dataset is already cleaned and needs no formatting. The dataset has 9995 rows and 21 columns. The column names are row id, order id, order date, ship date, ship mode, customer id, customer name, segment, country, city, state, postal code, region, product id, category, subcategory, product name, sales, quantity, discount, and profit.

Methodology

The project followed a systematic approach starting with excel dataset connection with tableau followed by all view visualisation. The final dashboard was designed to provide an interactive view of sales performance consisting of all views and filters.

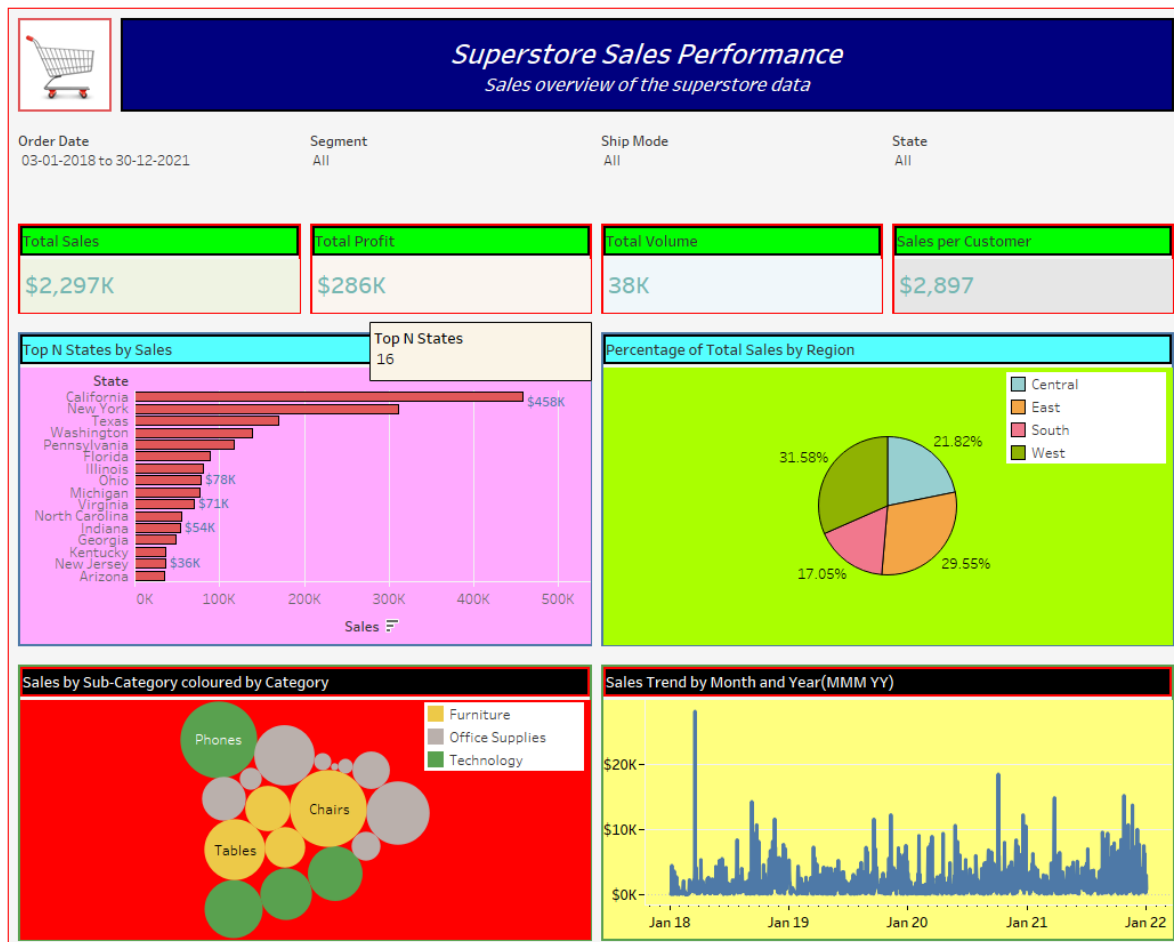
Dashboard Overview

The dashboard consists of 8 views

1. Total Sales: The overall sales figure
2. Total Profit: The overall profit
3. Total Volume: Represents the total number of product sold
4. Sales per customer: Represents the sales value per customer
5. Pie Chart: Sales contribution across each region
6. Bar Chart: Identify Top N states by sales, here one can choose the value of N
7. Bubble Chart: Evaluate sub-category sales trends
8. Line Chart: Tracks monthly sales performance

The dashboard has four filters named as order date, segment, ship mode, and state.

The dashboard has one image and one title.



Insights and Recommendations

Insight: The highest sales performing states from various regions are as follows:

- 1) **West:** California
- 2) **South:** Florida
- 3) **Central:** Texas
- 4) **East:** New York

Recommendation: Learn the marketing campaign from these top performing states and implement it in the other states.

Insight: During 2018 Sales were uniform from September to December and in the rest of the months it was not good at all. Year 2019 improved and got overall uniform Sales. During Year 2020 starting month's sales got uniform.

Later in 2021 ending months sales were more uniform compared to starting months sales.

Recommendation: Focus more on increasing the sales in the starting of the months in order to have a uniform sales trend.

Insight: Office Supplies sales are less compared to other categories.

Recommendation: Adjust pricing, advertise more and introduce more varieties of products.

Insight: The same day ship mode has the lowest sales, lowest profit and lowest sales per customer whereas the standard class ship mode has highest sales, highest profit and highest sales per customer.

Recommendation: Promote benefits of same day delivery. Give loyalty rewards for same day delivery and collect customer feedback. Expand the standard class ship mode as its giving more sales and profit.

Note: One can interact with Dashboard by selecting various filter options like date region to see the sales trend also interacting with products and regions to derive insights.

Conclusion

The Superstore Sales Performance using Tableau is helpful in the following ways.

- 1) Understanding customer behaviour which enables sales team to improve the marketing campaigns.
- 2) Finding underperforming areas and studying competitor analysis in those areas. Improving underperforming areas by the introduction of discounts,

strengthening supply chain, training the local sales team of those regions and reviewing the price model.

- 3) Sales trends help in forecasting and planning.
- 4) Identifying high performing areas and expanding sales in those regions.
- 5) Gaining insights into marketing trends and maximising growth.
- 6) Changing business strategies on the basis of visualisation of high and low performing areas.

References

- Superstore dataset provided by upGrad. Superstore dataset is also available with tableau desktop download as a part of the package.
- Data Science Bootcamp course provided by upGrad.
- Project is done on Tableau Desktop Public free edition which can be downloaded from <https://www.tableau.com/products/public/download>

Appendix

- The Dashboard with all the worksheet hidden is uploaded in Tableau Public website where people upload their Dashboard. Tableau Public website is free.
- https://public.tableau.com/views/Book2_17428306839780/SalesDashboard?:language=en-US&:sid=&:redirect=auth&:display_count=n&:origin=viz_share_link. Visit the above Tableau Public website link and interact with the Dashboard. The .twbx file is available in a separate folder, you can open it in your Tableau and interact with it.
- The Dashboard uploaded in Tableau Public website is made possible by using Tableau Desktop paid edition trial version as upload option was not available in Tableau Desktop Public free edition but .twbx file uploaded in Github was made in Tableau Desktop Public free edition.
- Calculated fields used are Sales per customer and Total_round_K_\$. Total_round_K_\$ is sum of sales in Thousand US Dollar.