Sales Analysis & Performance Dashboard

# 1. Project Overview

**Objective:**

For a sales dashboard in Excel, the goal is to provide managers and decision-makers with measurable performance metrics, identify patterns within different categories, and make informed decisions based on regional and category-wise sales data.

**Problem Statement:**

The use of large Excel sheets for manual data analysis hindered stakeholders from obtaining quick insights. This was problematic. Without a clear and consistent measurement system for sales, it was challenging for managers to identify trends, areas that were performing well, and products that had been delayed.

# 2. Data Description

**Data Source:**

The Sales Dashboard.xlsx Excel workbook is based on internal sales logs and contains this data.

**Data Volume:**

The workbook contains sales information for each month, with structured sheets that contain hundreds of rows categorized by product, region, and time.

**Key Data Fields:**

* Sales Amount
* Units Sold
* Sales Target
* Sales Achieved
* Product Category
* Region
* Month

**Data Cleaning:**

* Removed duplicates.
* Standardized product and region names.
* Formatted currency and date columns properly.
* Used Excel formulas (such as IFERROR, TRIM, ISBLANK) to clean and verify values.
* Created assist columns to simplify dashboard calculations.

# 3. Target Audience

**Primary Users:**

* Sales Executives
* Regional Managers
* Business Analysts
* Senior Leadership

**How it Helps:**

Easily monitors real-time performance metrics, compares targets vs achievements, and pinpoints areas that need improvement or are exceeding expectations using Excel without any additional software.

# 4. Key Features of the Dashboard

* Total sales, sales comparison, and dynamic KPI cards.
* Goal, achievement rate, and total units sold KPIs.
* Line charts for monthly sales trends.
* Bar and column graphs for region-wise analysis.
* Evaluation of product categories by profitability.
* Conditional formatting for performance comparison.

**Interactive Filters:**

* Data validation for dropdowns (region, month, product).
* Filtered views with linked charts.
* Pivot charts and slicers for dynamic updates.

# 5. Tools and Techniques Used

**Tool Used:**

* Microsoft Excel

**Techniques & Features:**

* Pivot Tables and Charts
* Conditional Formatting
* Data Validation for dropdowns
* Named Ranges
* Separate sheets for clean design
* Customized chart colors, axis alignment, and titles

# 6. Project Scope and Limitations

**Scope:**

* Monthly sales analysis across product categories and regions.
* Visual comparison of sales figures to targets.
* Organized summaries for management reporting.

**Limitations:**

* Manual data refresh required.
* Limited real-time collaboration compared to cloud tools.
* No demographic customer analysis.

# 7. Outcome / Expected Results

**📈 Insights Gained:**

* Identified top and bottom performing regions.
* Tracked performance vs targets.
* Recognized top-selling product categories.
* Identified peak and off-peak sales periods.

**📊 Business Value:**

* Improved decision-making speed and clarity.
* Reduced manual reporting efforts.
* Enhanced tracking of sales trends and goal setting.

# 8. Future Enhancements

* Automate data refresh using Power Query.
* Integrate customer feedback and market trends.
* Use macros for report automation.
* Forecast sales using Excel or regression models.