

Financial Performance Dashboard Analysis - Report

Business Analyst Internship by Unified Mentor

Executive Summary

This project is a comprehensive revisit of my Business Analyst Internship, demonstrating advanced dashboard design and financial analytics. The Financial Performance Dashboard distills multi-dimensional business data into actionable insights for executives and analysts, driving more effective decision-making and business strategy.

Purpose

The dashboard is designed to deliver a unified, interactive view of financial performance across global operations. Its primary purpose is to empower users to monitor key business outcomes—sales, profit, discounts, and units sold—while enabling analysis by country, segment, product, and time period. This supports timely, data-driven decisions regarding resource allocation, pricing strategy, and growth initiatives.

Objective

- Consolidate financial metrics into an accessible visual analytics tool.
- Provide dynamic filtering for granular performance exploration.
- Enable the identification of trends, strengths, and opportunities for improvement across regions and business lines.

Dashboard Components: Purpose and Insight

Filters

- **Purpose:**
Enable users to slice data by Country and Segment for custom analysis.

Country	Segment
<input checked="" type="checkbox"/> (All)	<input checked="" type="checkbox"/> (All)
<input checked="" type="checkbox"/> Canada	<input checked="" type="checkbox"/> Channel Partners
<input checked="" type="checkbox"/> France	<input checked="" type="checkbox"/> Enterprise
<input checked="" type="checkbox"/> Germany	<input checked="" type="checkbox"/> Government
<input checked="" type="checkbox"/> Mexico	<input checked="" type="checkbox"/> Midmarket
<input checked="" type="checkbox"/> United States o...	<input checked="" type="checkbox"/> Small Business

- Insight:**
These filters boost interactivity, letting decision makers focus on specific regions or business units to address tactical and strategic business questions.

KPI Cards

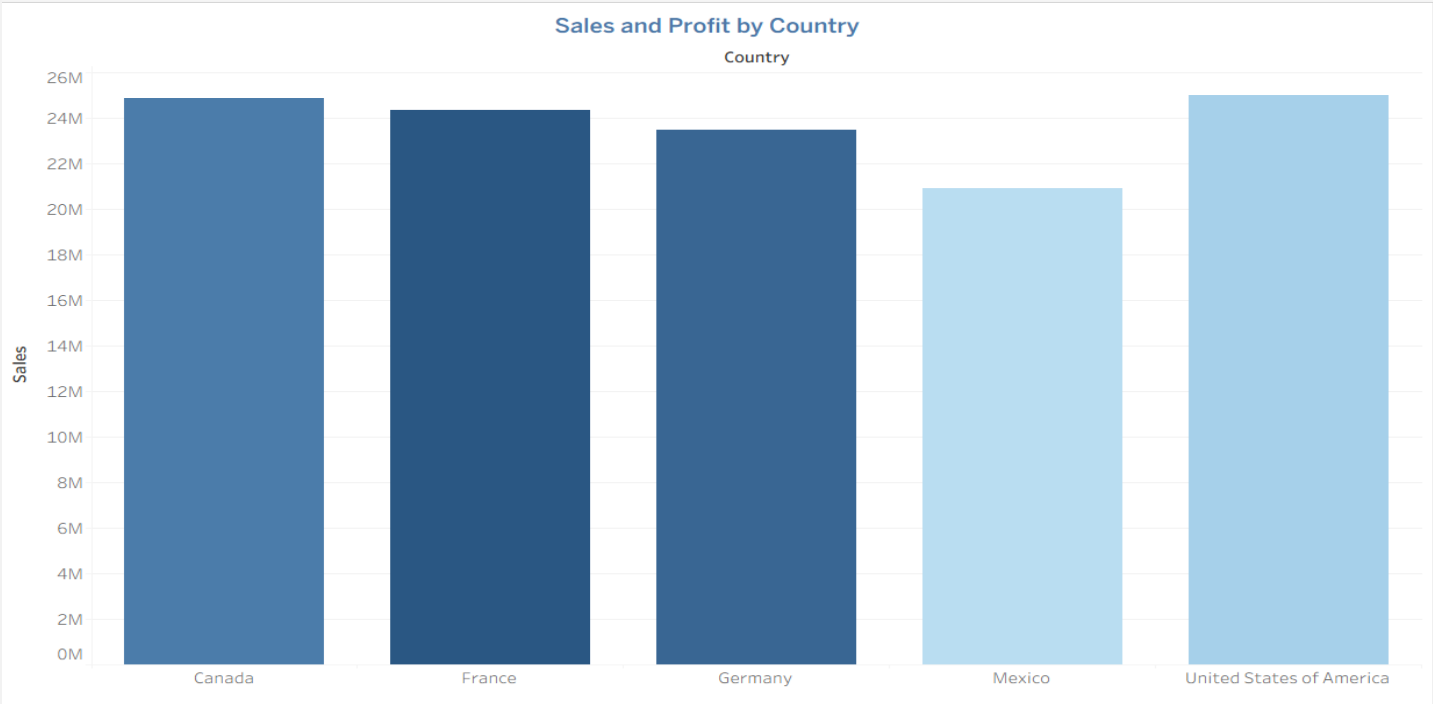
- Purpose:**
Display headline metrics:
 - Total Gross Sales (\$127.93M)
 - Total Discounts (\$16.9M)
 - Total Discounts Given (9.21M)
 - Total Units Sold (\$1.13M)

Total Gross Sales	Total Discounts
\$127.93M	\$16.9M
	.
Total Discounts	Total Units Sold
9.21M	\$1.13M

- Insight:**
KPI tiles give a quick executive snapshot of overall business health, highlighting critical outcomes at a glance.

Sales and Profit by Country (Bar Chart)

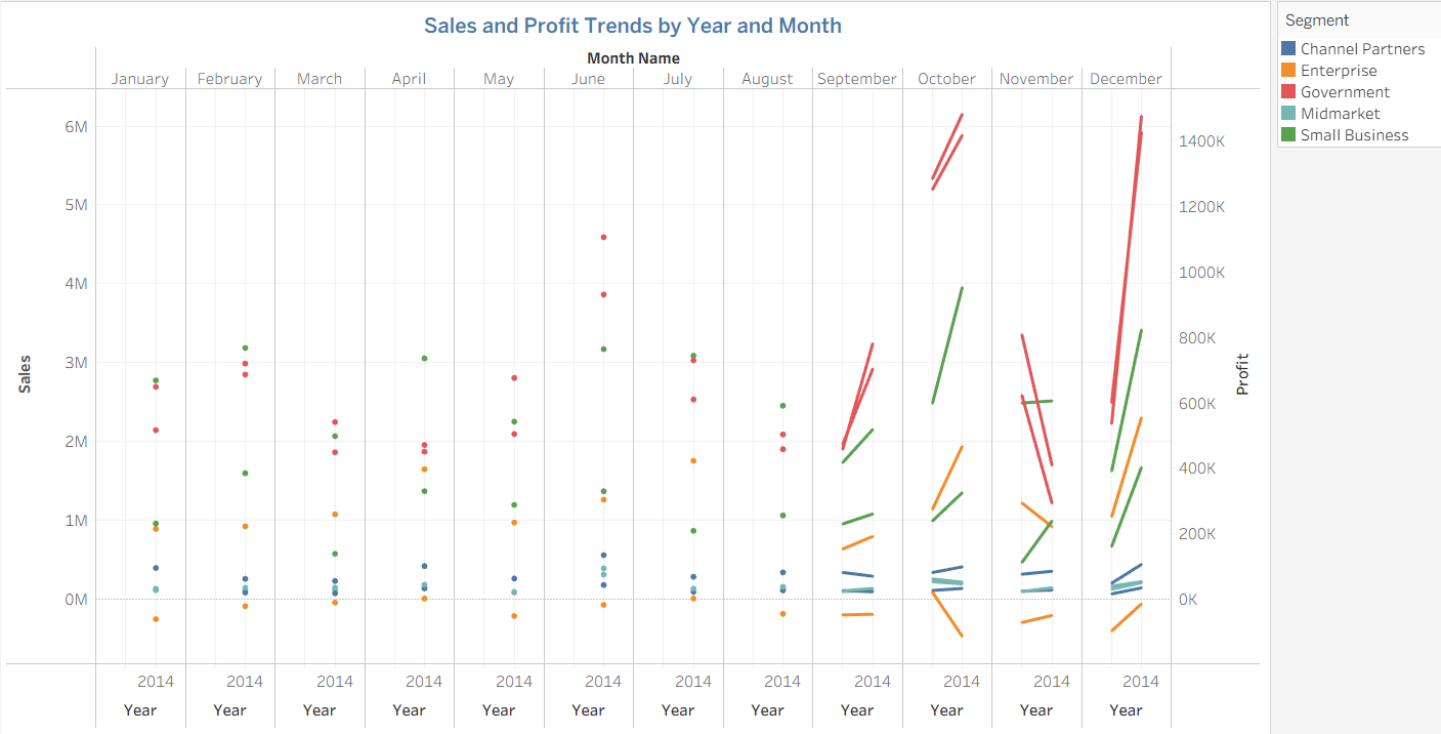
- Purpose:**
Visually compares sales and profit across countries.



- **Insight:**
Identifies top-performing and underperforming regions, supporting strategic decision-making for geographic focus.

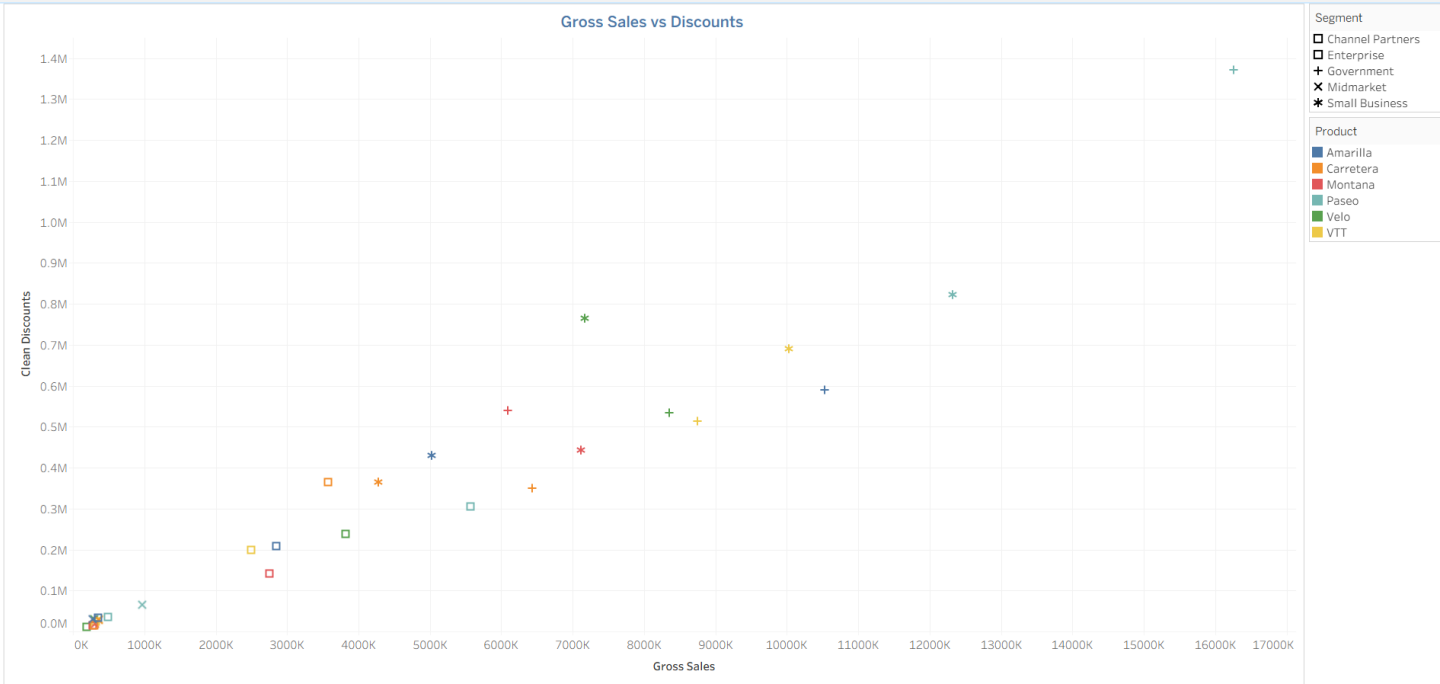
Sales and Profit Trends by Year and Month (Line Chart)

- **Purpose:**
Show seasonal and annual performance by segment.
- **Insight:**
Reveals trends such as seasonality or growth cycles, informing operational planning, campaigns, and forecasting.



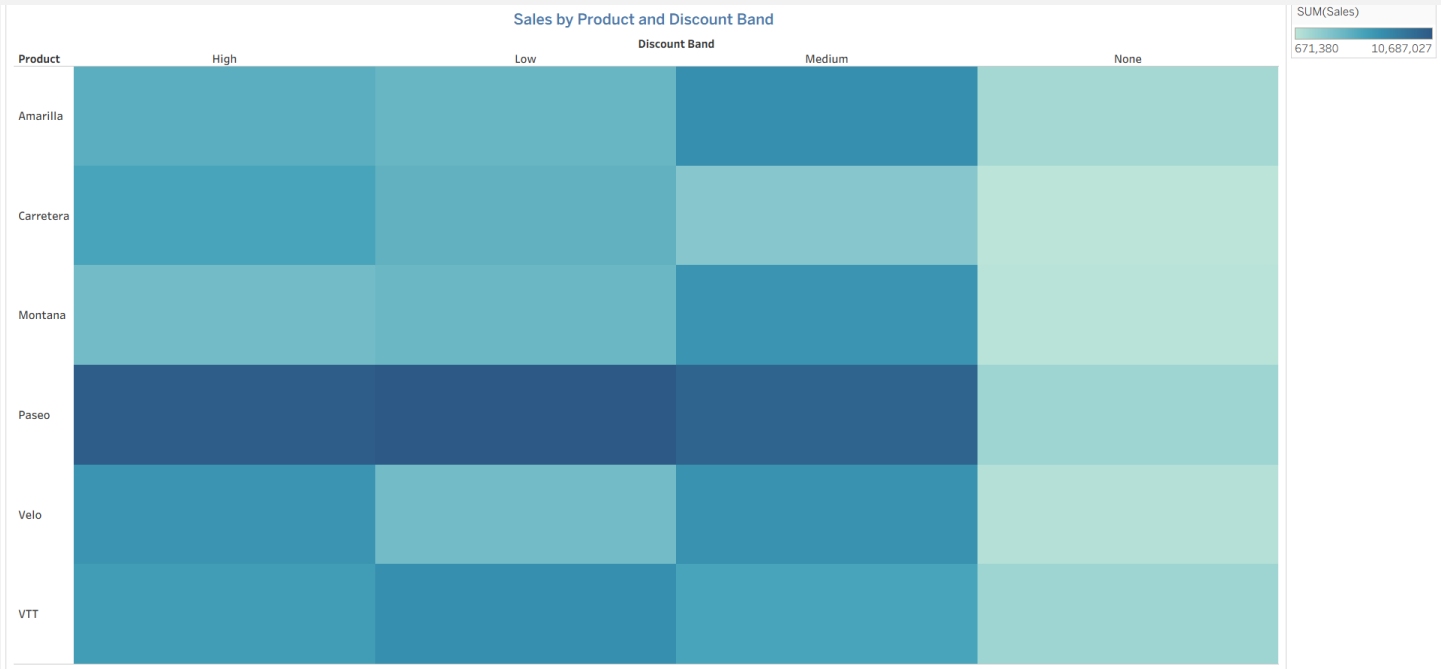
Gross Sales vs Discounts (Scatter Plot)

- **Purpose:**
Analyze the relationship between sales volume and discount amount, segmented by business type.
- **Insight:**
Shows how discounting drives sales in some segments and flags the possible impacts on profit margins.



Sales by Product and Discount Band (Heat Map)

- Purpose:**
Show the impact of discount bands on product sales.
- Insight:**
Identifies which products benefit most from discounts, enabling refined pricing and discounting strategies.



Key Insights

- The United States, Canada, France, and Germany are top revenue drivers, while Mexico presents growth opportunities.
- Profit and discount analysis shows the varying returns of discount strategies per region and product.
- Trends highlight peak sales periods, informing campaign and inventory planning.
- Discount efficiency must be monitored at the margin level to prevent profit erosion.

Recommendations

- Refine discount policies to target only the combinations of products and periods yielding the strongest sales and profit benefits.
- Develop strategic initiatives to lift lagging regions based on dashboard findings.
- Leverage dashboard interactivity for ongoing deep dives and live executive discussions.

Conclusion

This dashboard, as a revisited capstone of my Business Analyst Internship, exemplifies clean analytics design and business storytelling. By delivering targeted insights through well-defined components, it empowers organizations to align strategy with real-world results.