**Marketing Dashboard**

1. Creating mockup of the dashboard

2. Creating Important Metrics/Measures (Net Sales, GM %, Net Profit %)

The **marketing team** focuses on Net Profit.

Net Profit = Revenue − Total Expenses

Net profit is the amount of money a company retains after all expenses, including operating costs, interest, taxes, and other non-operating expenses, have been deducted from revenue.

The marketing team focuses on **net profit** because it shows how effective their strategies are in generating profit after all costs are accounted for. By looking at net profit, they can see if their efforts are not only increasing sales but also covering expenses and contributing to overall business growth.

3. Segment wise- product performance matrix with NS $, GM $, GM%

4. Region wise – market wise - Customer performance matrix with NS $, GM $, GM%

5. A Donut chart which visually breaks down **Net Sales** into **Gross Margin** and **COGS**, showing what portion of sales is contributing to profitability after covering the costs directly associated with production.

Net Sales = Gross Margin + COGS

If **Gross Margin** takes up a large portion of the chart, it indicates that a significant percentage of sales is retained as profit.

A high share of **COGS** may indicate inefficiencies or high costs in production, which could be an area for improvement.

6. Donut charts showing contribution of NS$, pre-invoice discounts and post-invoice discounts on sales

To assess the overall impact of discounts on revenue. A large portion of post-invoice discounts may indicate customer dissatisfaction or returns, while significant pre-invoice discounts suggest strategies like bulk or early payment incentives.

If a significant portion of revenue is being lost to discounts (either pre- or post-invoice), it could affect the company’s profitability. The business may need to reconsider its discounting strategies.

7. Waterfall chart illustrating how gross margin and operational expenses contribute to net profit.

GM = Revenue from Sales – COGS

You can see if the business is generating sufficient gross margin to cover operational expenses and still achieve a reasonable net profit.

**Operational Expenses** OPEX refers to the ongoing expenses required to run the business like Administrative, Rent, utilities, salaries of non-production staff (e.g., marketing, Office supplies, advertising, research and development (R&D)

**COGS** is directly tied to production cost and impacts gross profit while,

**OPEX** covers the broader operational costs needed to run the business and impacts net profit.

Gross profit is the amount of money a company makes from its core business activities (sales of goods or services) after subtracting the **Cost of Goods Sold (COGS)**.

Net profit is the amount of money left after all expenses have been deducted from the company’s total revenue, including operating expenses, taxes, interest, and non-operating costs.

A waterfall chart helps to break down the **incremental changes** from one value to the next.

The chart will display how gross margin is adding to the profit, while operational expenses are subtracting from it, offering a clear visual representation of how each factor contributes to the final result.

It helps you identify whether **operational expenses** are a significant drain on profits or if **gross margin** is a strong contributor.

8. Scatter plot displaying product performance by division, segmented by category.

Segment, category, product – values

x-axis -- net sales

y-axis – gross margin

legend—divion

size of bubble – NS $

