

Arooba

Agenda

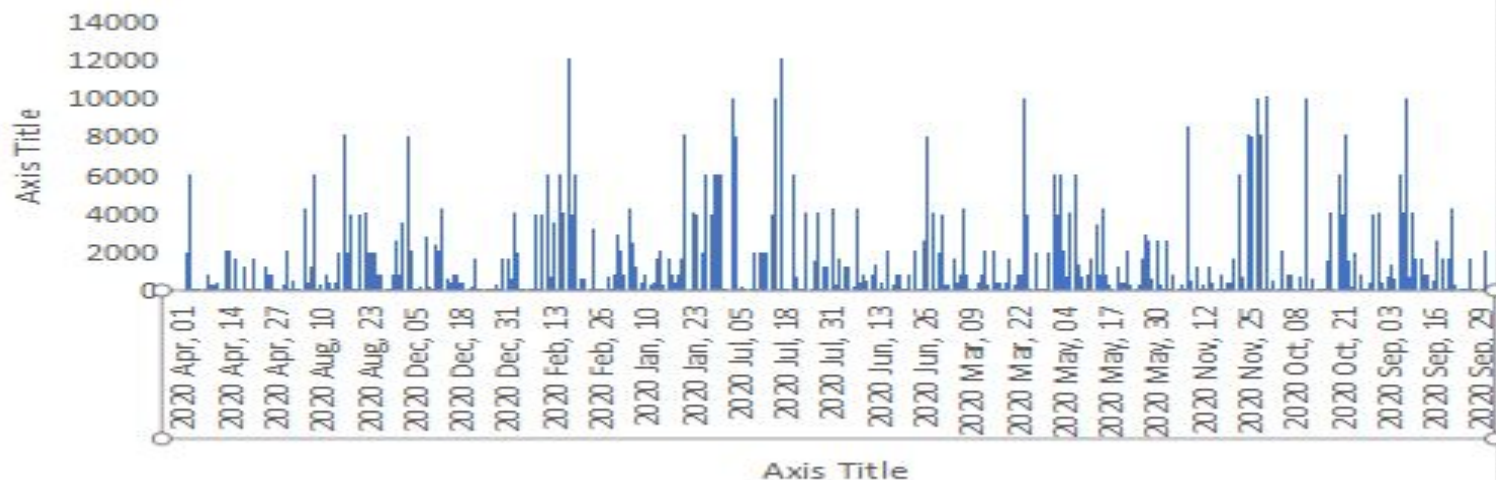
- Being analyst to analyzes data to support a company's marketing efforts.
- The analyst might use the insights they find to help a company make better business decisions—like increasing revenue or optimizing marketing campaigns.

Problem Statement

1. YTD Sales Performance Comparison
2. Create a measure to calculate the YTD sales for the previous year
3. Resellers and Territories Comparison:
4. Pareto Principle Analysis:
5. Profit Margin Analysis:

CALCULATE and TOTALYTD functions to calculate the year-to-date sales.

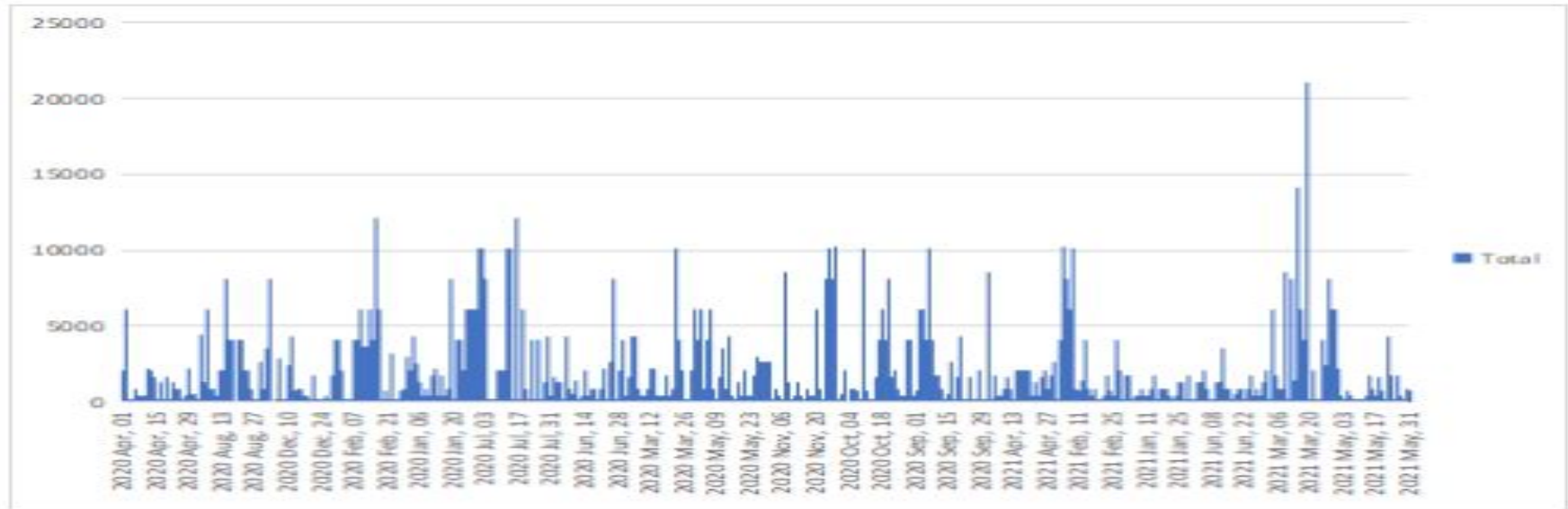
Sum of Sales Amount



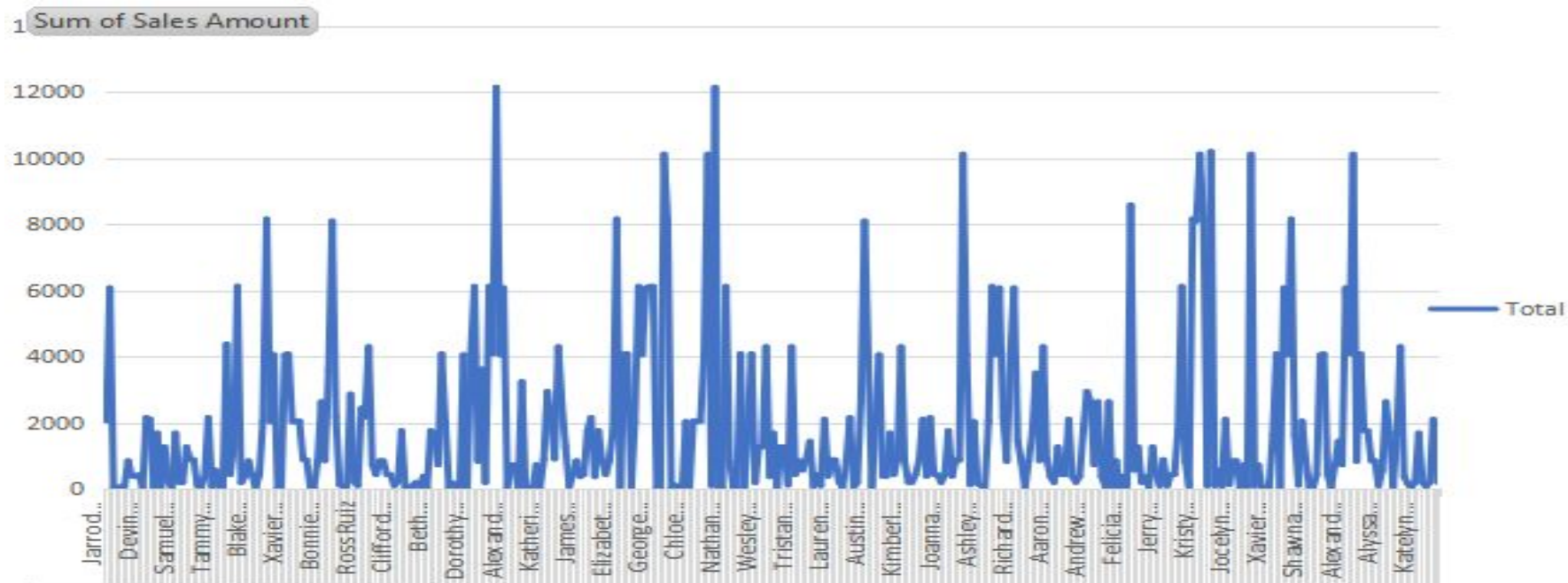
Create a measure to calculate the YTD sales for the previous year

Clipboard		Data	
Customer		YTD Sales	Previous Year
Franklin Xu		4,349.89	
Jordan Turner		4,798.33	
Willie Xu		6,650.60	
Willie Xu		6,839.46	
Franklin Xu		6,935.08	
Kate Anand		10,872.06	
Larry Vazquez		10,899.62	
Larry Munoz		11,068.01	
Jordan Turner		11,200.77	
Lacey Zheng		11,248.46	
Lisa Cai		11,469.19	
Janet Munoz		12,489.17	
Maurice Shen		12,909.67	
Francisco Sara		13,164.64	
Brad She		13,173.19	
Brandi Gill		13,195.64	
Rosa Hu		13,215.65	
Adriana Gonzalez		13,242.70	
Randall Dominguez		13,265.99	
Margaret He		13,269.27	
Kaitlyn Henderson		13,294.27	
Nichole Nara		13,295.18	

YTD sales for the previous year

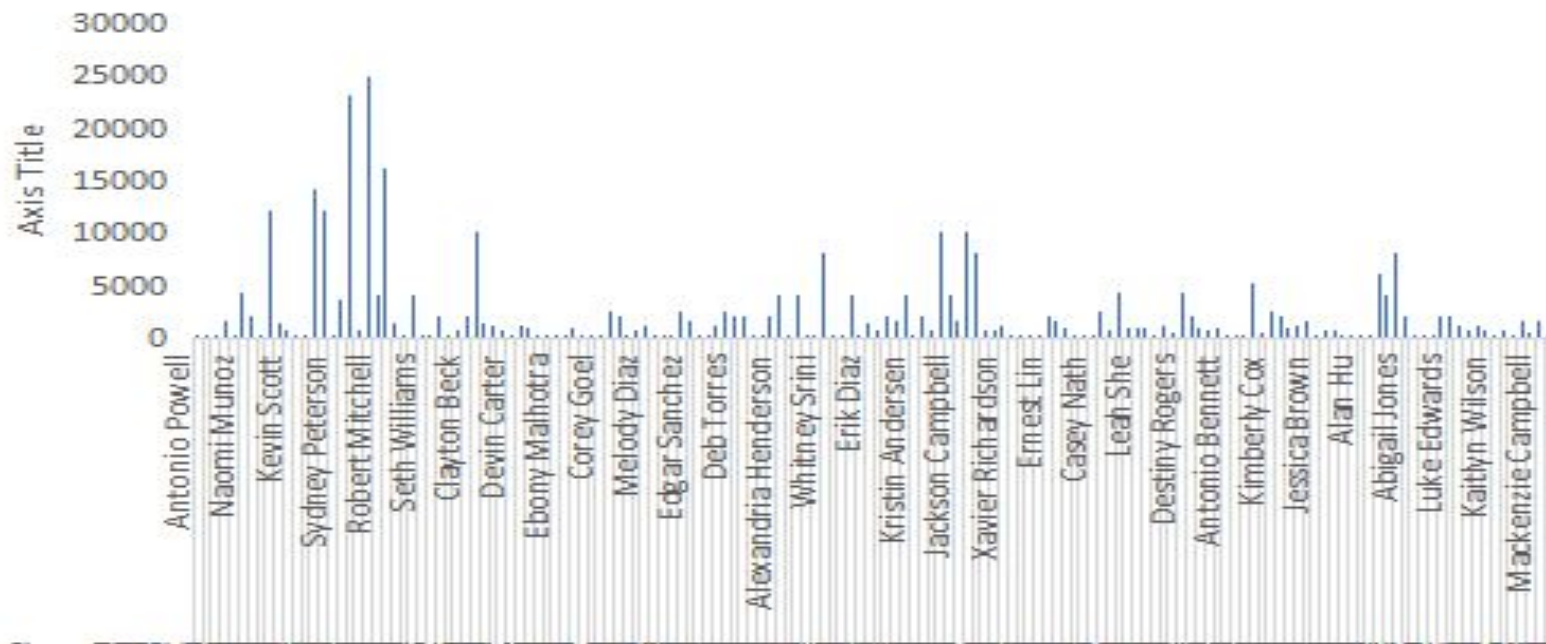


Customer



Reseller

Sum of Sales Amount



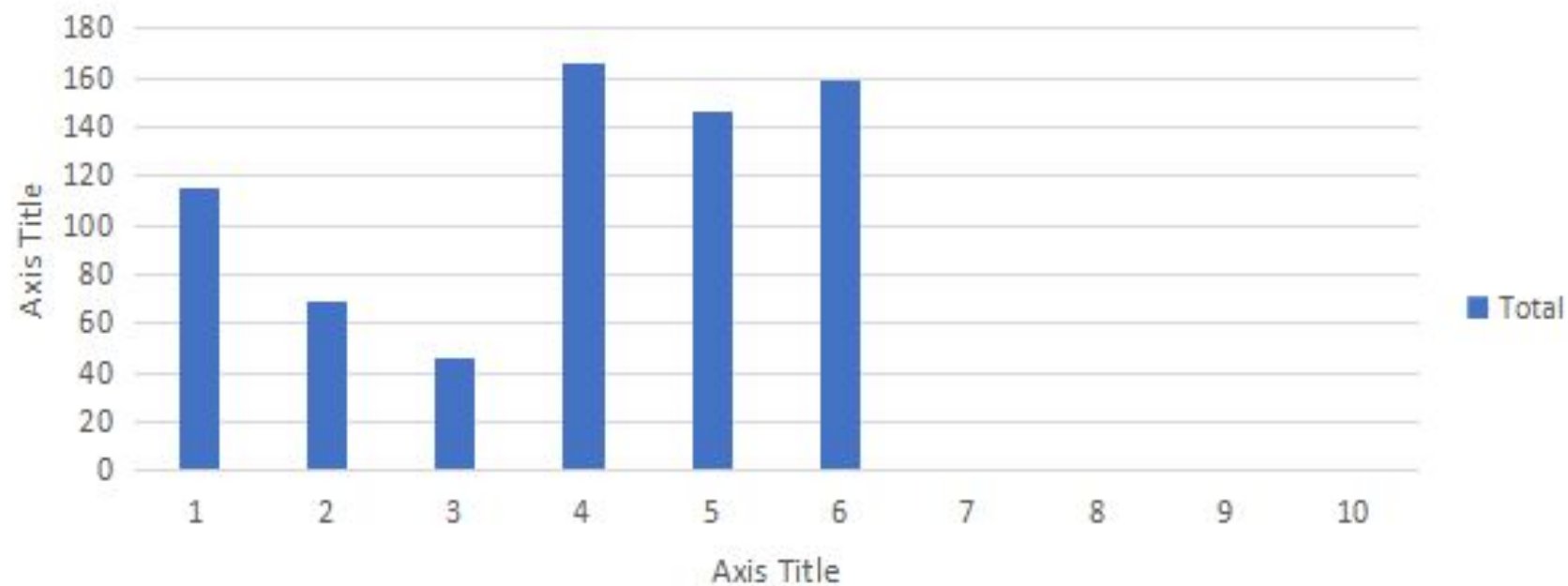
Create a table to compare sales by customer

Customer	Sum of Sales Amount
Aaron Baker	1,750.98
Aaron Bryant	133.96
Aaron Butler	14.98
Aaron Campbell	1,155.48
Aaron Carter	39.98
Aaron Chen	39.98
Aaron Coleman	61.96
Aaron Collins	6,047.32
Aaron Diaz	6,029.57
Aaron Edwards	94.48
Aaron Evans	2,433.04
Aaron Flores	1,538.56
Aaron Foster	4,912.47
Aaron Gonzales	1,810.46
Aaron Gonzalez	132.97
Aaron Green	27.28
Aaron Griffin	71.58
Aaron Hall	28.99
Aaron Hayes	3,112.97
Aaron Henderson	27.28
Aaron Hernandez	94.48
Aaron Hill	35.96
Aaron Hughes	4,456.14
Aaron Jai	574.98
Aaron Jenkins	119.98
Aaron King	4,758.03
Aaron Kumar	2,049.10
Aaron Lal	2,309.97
Total	109,809,274.20

Create a table to compare sales by resellers

Reseller	Sum of Sales Amount
Acceptable Sales & Service	1,258.38
Accessories Network	2,165.79
Acclaimed Bicycle Company	7,300.83
Ace Bicycle Supply	3,749.13
Action Bicycle Specialists	321,752.84
Active Cycling	1,805.45
Active Life Toys	200,013.37
Active Systems	639.98
Active Transport Inc.	88,245.87
Activity Center	42,650.40
Advanced Bike Components	361,999.06
Aerobic Exercise Company	2,676.65
Affordable Sports Equipment	311,446.43
All Cycle Shop	3,003.20
All Seasons Sports Supply	7,436.27
Alpine Ski House	11,346.88
Alternative Vehicles	9,127.82
Amalgamated Parts Shop	197,327.59
Another Bicycle Company	216,653.62
Area Bike Accessories	380,454.03
Area Sheet Metal Supply	2,446.38
Associated Bikes	7,780.34
Atypical Bike Company	381.19
Authentic Sales and Service	1,618.39
Authorized Bike Sales and Rental	148,588.05
Basic Bike Company	13,137.37
Basic Sports Equipment	58,236.07
Beneficial Exercises and Activities	1,714.69
Total	109,809,274.20

Resellers and Territories Comparison:



SalesTerritoryKey ▼

Create a measure to calculate the total turnover for each customer

Structure Formatting Properties Sort Groups Relationships Calculations

1 Cumulative Turnover % = DIVIDE([Customer Turnover], SUMX(ALL(Sales[Sales Amount]), [Customer Turnover]), 10)
2

Clipboard Data Queries

Customer	Sum of Customer Turnover
Franklin Xu	22,569.94
Jaclyn Xu	19,297.26
Rafael Xu	17,572.39
Jaime Gutierrez	16,502.92
Jaime Moreno	15,708.02
Jenny Xu	15,370.86
Jaime Hernandez	14,705.86
Jordan Hernandez	14,538.52
Alexandra Hall	14,305.32
Arturo Xu	13,680.74
Jordan King	13,637.05
Nichole Nara	13,295.38
Kaitlyn Henderson	13,294.27
Margaret He	13,269.27
Randall Dominguez	13,265.99
Adriana Gonzalez	13,242.70
Rosa Hu	13,215.65
Brandi Gill	13,195.64
Brad She	13,173.19
Francisco Sara	13,164.64
Maurice Shan	12,909.67
Janet Munoz	12,489.17
Jordan Campbell	12,218.44
Clayton Xu	12,213.16
Abigail Foster	12,079.46
Abigail Henderson	11,916.44
Abigail Coleman	11,899.76
Isabella Hall	11,674.94
Nicole Blue	11,494.94
Total	110,103,929.21

Identify the top 20 customers and analyze their key characteristics and patterns

Mohamed Pail	31,170.03
Willie Xu	26,980.12
Franklin Xu	22,569.94
Jaclyn Xu	19,297.26
Rafael Xu	17,572.39
Jaime Gutierrez	16,502.92
Jaime Moreno	15,708.02
Jenny Xu	15,370.86
Jaime Hernandez	14,705.86
Jordan Hernandez	14,538.52
Alexandra Hall	14,305.32
Arturo Xu	13,680.74
Jordan King	13,637.05
Nichole Nara	13,295.38
Kaitlyn Henderson	13,294.27
Margaret He	13,269.27
Randall Dominguez	13,265.99
Adriana Gonzalez	13,242.70
Total	80,785,001.81

Pareto Principle Analysis:

Create a measure to calculate the profit margin

```
1 Profit Margin = DIVIDE(SUM(Customer[Profit]), SUM(Sales[Sales Amount]), 0)  
2
```



A screenshot of a data table with two columns: 'Profit' and 'Profit Margin'. The 'Profit' column has a value of 12,551,366.25. The 'Profit Margin' column has a value of 2,112.86. The table is part of a larger interface, with a filter icon, a refresh icon, and a menu icon visible in the top right corner. A vertical scrollbar is also present on the right side of the table.

Profit	Profit Margin
12,551,366.25	2,112.86

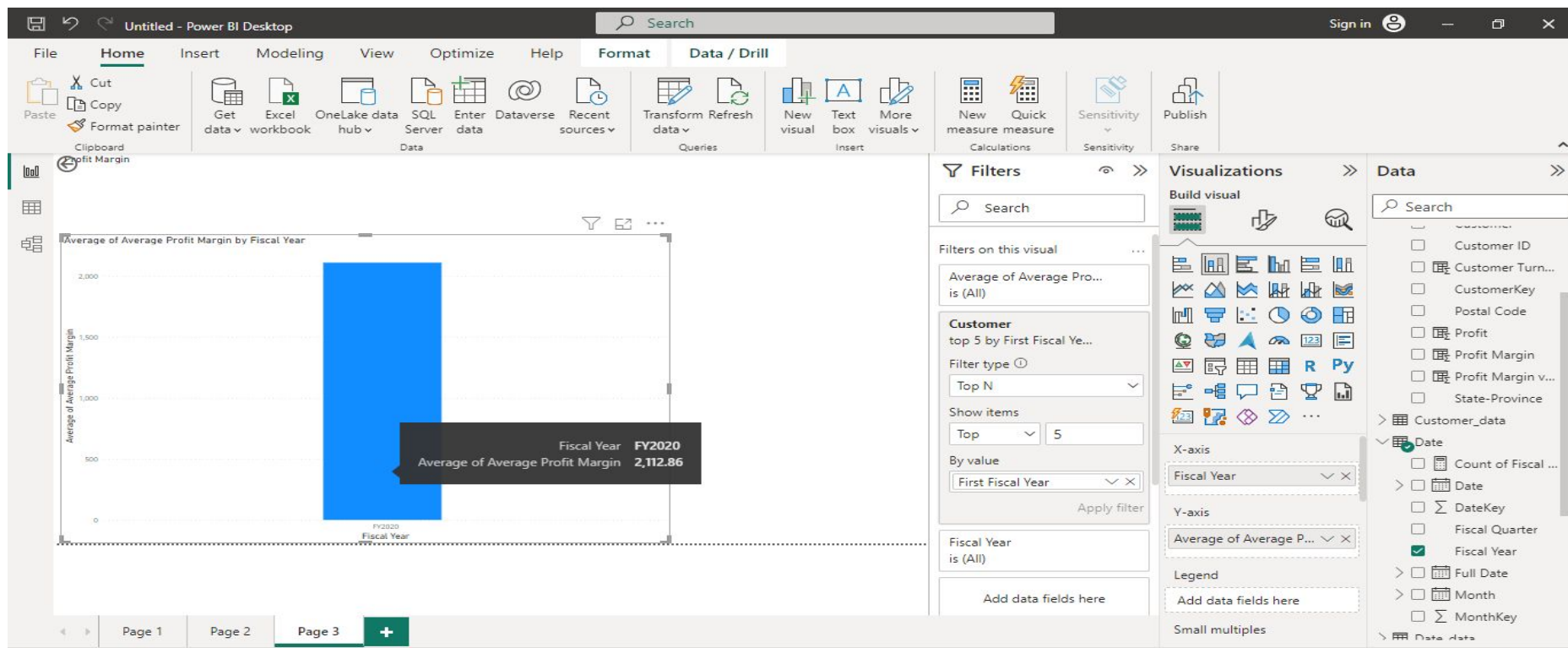
Profit Margin Analysis:

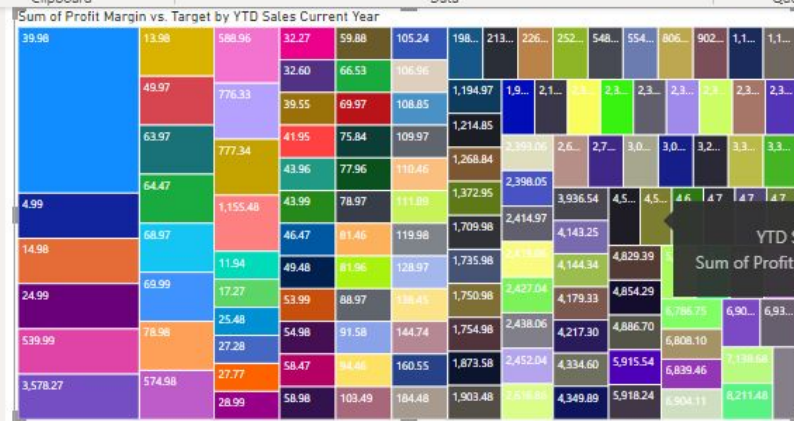
Compare the average profit margin with the target of 14%.

Analyze the sales data to identify opportunities and targets for optimizing the profit margin, such as focusing on high-margin products or customers.

$$\text{Profit Margin vs. Target} = [\text{Average Profit Margin}] - 0.14$$

How do we perform in 2020?





YTD Sales Current Year 4,501.55
Sum of Profit Margin vs. Target 2,112.72

Filters

Search

Filters on this visual

Count of Profit Mar...
is (All)

Customer
top 10 by Count of YT...

Filter type

Top N

Show items

Top

10

By value

Count of YTD Sales C... X

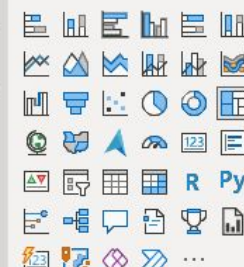
Apply filter

Sum of Profit Margin v...
is (All)

YTD Sales Current Year
is (All)

Visualizations

Build visual



Category

YTD Sales Current Year X

Details

Add data fields here

Values

Sum of Profit Margin ... X

Tooltips

Data

Search cu

Customer

- ☐ Average Profit ...
 - ☐ City
 - ☐ Country-Region
 - ☐ Cumulative Tur...
 - ☐ Customer
 - ☐ Customer ID
 - ☐ Customer Turn...
 - ☐ CustomerKey
 - ☐ Postal Code
 - ☐ Profit
 - ☐ Profit Margin
 - ☒ Profit Margin v...
 - ☐ State-Province
 - ☒ YTD Sales Curr...
 - ☐ YTD Sales Previ...
- Customer_data
- ☐ City
 - ☐ Country-Region

Compare the average profit margin with the target of 14%.

Clipboard	Data
4.99 YTD Sales Current Year	6,338.17 Sum of Profit Margin vs. Target
11.94 YTD Sales Current Year	2,112.72 Sum of Profit Margin vs. Target
13.98 YTD Sales Current Year	4,225.45 Sum of Profit Margin vs. Target
14.98 YTD Sales Current Year	6,338.17 Sum of Profit Margin vs. Target
17.27 YTD Sales Current Year	2,112.72 Sum of Profit Margin vs. Target
24.99 YTD Sales Current Year	6,338.17 Sum of Profit Margin vs. Target
25.48 YTD Sales Current Year	2,112.72 Sum of Profit Margin vs. Target
27.28 YTD Sales Current Year	2,112.72 Sum of Profit Margin vs. Target
27.77 YTD Sales Current Year	2,112.72 Sum of Profit Margin vs. Target
28.99 YTD Sales Current Year	2,112.72 Sum of Profit Margin vs. Target

Compare the average profit margin with the target of 14%.

