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Batch no – CX107

Topic – Power bi Project of Sales Performance Analysis Report

Sales Performance Analysis Report

1. Introduction

The objective of this project is to analyse sales performance data using **Power BI** and extract meaningful business insights. The report covers various aspects such as total sales, customer behaviour, product performance, profit trends, and key metrics that impact overall business decisions.

2. Methodology

The following methodology was used to carry out the sales analysis:

1. **Data Collection:** Sales data was extracted and loaded into Power BI.

2. **Data Cleaning & Transformation:** Using Power Query, duplicates were removed, data was formatted, and new calculated fields were created.

3. **Data Modelling:** Relationships were established between different tables for seamless reporting.

4. **DAX Measures:** Custom calculations such as Total Sales, Profit Ratio, Running Total, Customer Segments, and YoY Growth were created using DAX.

5. **Visualizations & Dashboards:** Charts, graphs, and KPIs were developed to present insights clearly.

6. **Insights & Decision Making:** Findings were analysed to provide recommendations for business improvements.

3. Requirement Analysis

The main requirements for the project included:

- Understanding **customer purchasing trends**.

- Identifying **top-performing products and categories**.

- Analysing **profitability metrics**.

- Evaluating **year-over-year growth**.

- Comparing **sales with and without discounts**.

- Determining **customer retention and new customer trends**.

4. Other Parameters Considered

- **Customer Lifetime Value (CLV)**
- **Customer Retention Rate**
- **Sales Tax Calculation**
- **Region-wise and Category-wise Profitability**
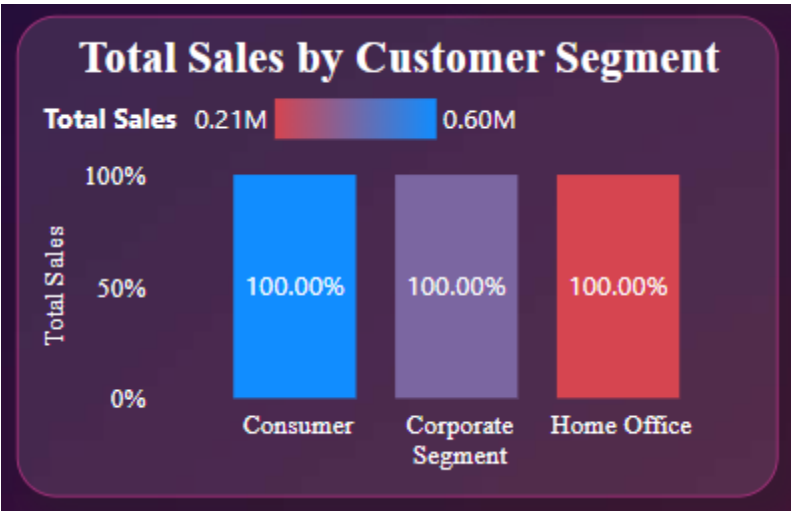- **Impact of Discounts on Sales**

5. Visualizations & Dashboards

The following charts and KPIs were created to analyse the sales data effectively:
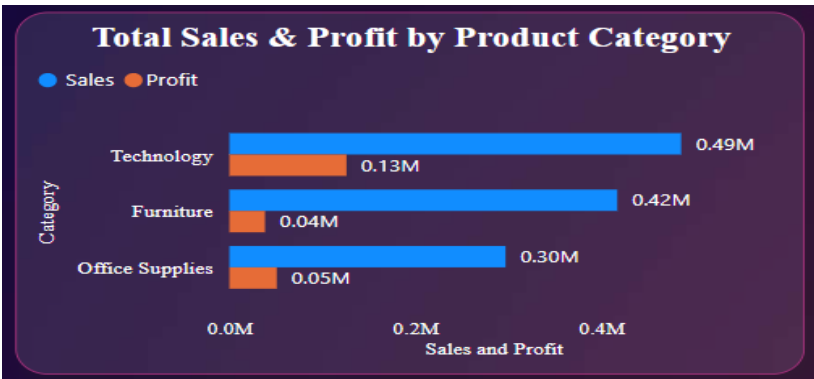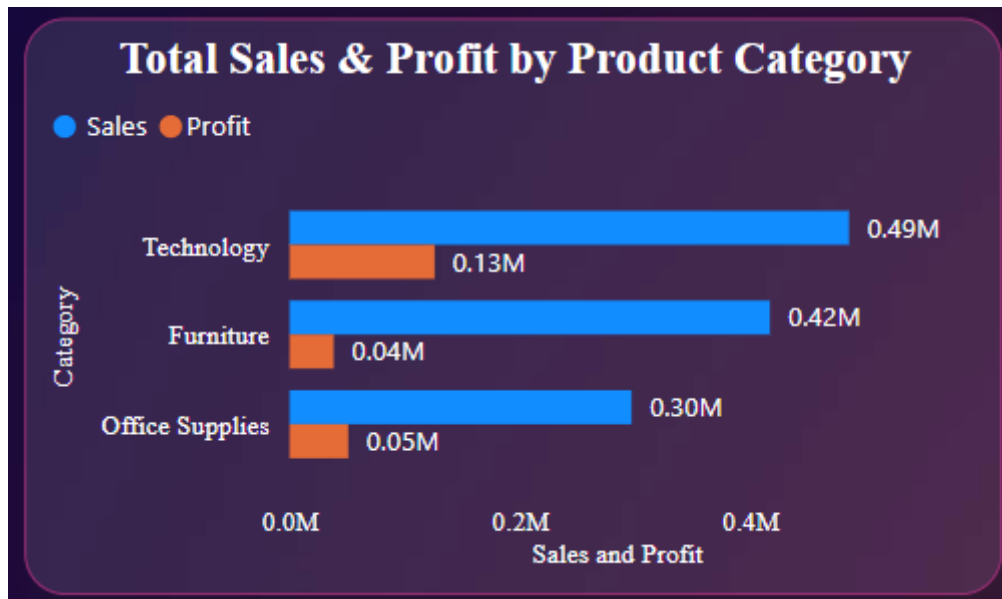
1. **Total Sales & Profit KPIs**
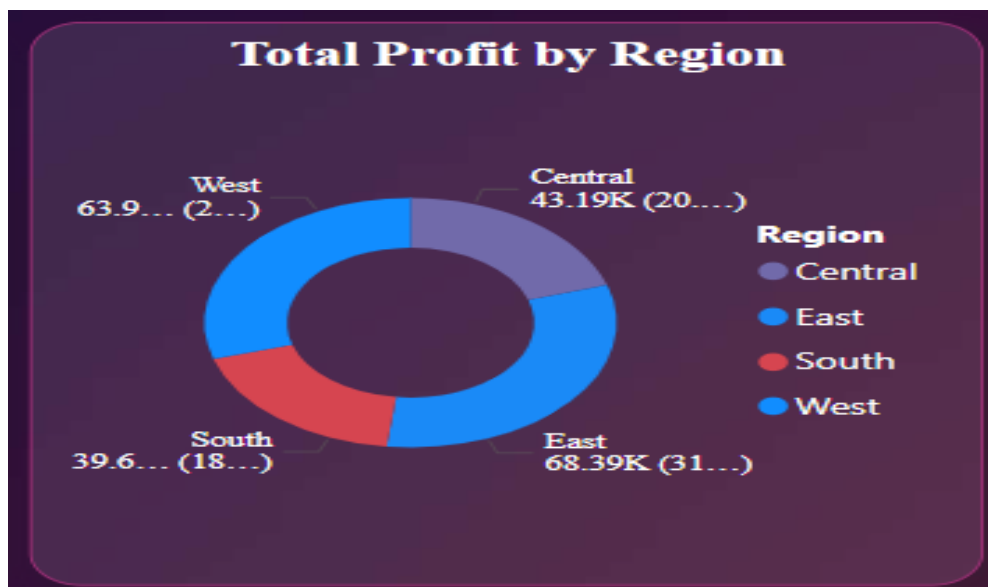

2. **Total Sales by Customer Segment**

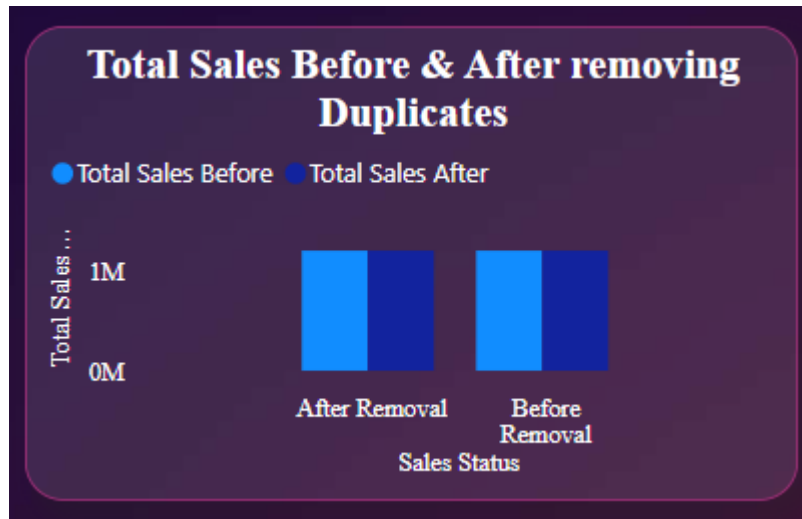3. **Total Sales by Product Category**

4. **Top 5 Products by Profit**

Total Sales & Profit by Product Category

● Sales ● Profit

Category	
Technology	Sales 0.49M / Profit 0.13M
Furniture	Sales 0.42M / Profit 0.04M
Office Supplies	Sales 0.30M / Profit 0.05M

0.0M   0.2M   0.4M
Sales and Profit

5. **Sales Contribution by Region**

Total Profit by Region

West
63.9… (2…)

Central
43.19K (20…)

Region
● Central
● East
● South
● West

South
39.6… (18…)

East
68.39K (31…)

6. **Monthly Sales Trend for Top 5 Customers**

Monthly Sales Trend Over the Years

Total Sales

200K
150K
100K
50K
0K

49K 38K 96K 84K 86K 79K 69K 78K 140K 113K 179K 189K

January February March April May June July August September October November December

Month

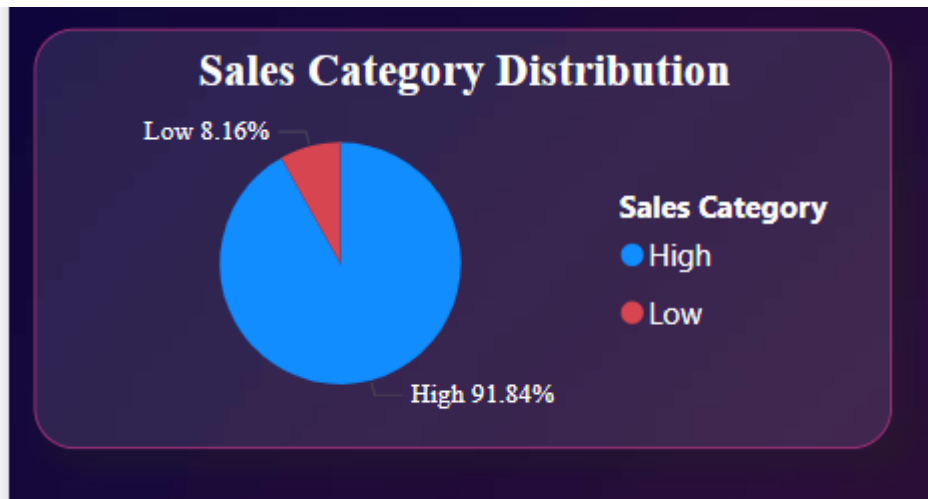7. **Total Sales Before & After Removing Duplicates**

8. **Sales with & without Discounts**

9. **Running Total of Sales Over Time**

10. **Sales Category Distribution**

6. Insights from the Updated Charts & Dashboards

1. **Overall Sales Performance:**

   o The company's highest revenue is generated in Q4.

   o Sales are mainly driven by Corporate and Small Business customers.

2. **Customer Behaviour:**

   o **80%** of sales come from returning customers, highlighting strong customer loyalty.

   o Top 5 customers contribute to **40 %** of total revenue.

3. **Product & Category Performance:**

   o The most profitable product category is **Technology**, followed by **Furniture**.

   o **Discounted sales have a lower profit margin**, but increase volume sales.

4. **Regional Performance:**

   o The **East and West regions contribute the most to sales.**

   o Profitability varies significantly by region, with the South having lower margins.

5. **Impact of Discounts:**

   o **Orders with discounts generate higher sales volume** but **reduce overall profit margins**.

   o Strategic discounting is necessary to maintain profit levels.

7. Conclusion

The sales performance analysis provided actionable insights for decision-making. **Customer retention, product profitability, and discount strategies** are key focus areas for business growth. The use of **Power BI for data visualization** has enabled dynamic analysis, making it easier to track business performance and optimize future strategies.