

Q1 Sales Performance Analysis

Business Analysis & Executive Dashboard Case Study

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Role: Business Analyst (Aspirant)

Tool Used: Microsoft Excel (PivotTables, Slicers, KPI Dashboard)

Project Type: Simulated Business Case Study

Version: 1.0

Confidential – Academic Portfolio Project

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Project Background

This project simulates a real-world business scenario in which a retail organization requires a structured analysis of its Quarter 1 sales performance. The management team has observed variations in regional sales growth and product-level profitability. However, a consolidated analytical view was not available to support strategic decision-making.

To address this, a Business Analysis approach was applied, integrating stakeholder identification, RACI mapping, and root cause analysis before developing an interactive Excel dashboard.

High - Level Scope Overview

The scope of this project includes:

- Analysis of Q1 sales performance for 2022 and 2023
- Calculation of total revenue, profit, and profit margin
- Comparison of Year-over-Year (YoY) growth
- Regional and category-level performance evaluation
- Development of an executive-level dashboard

Expected Outcome

The final deliverable includes:

- Structured BA documentation
- Cleaned and transformed dataset
- KPI-based executive dashboard

Problem Statement

The organization currently records sales transactions across multiple product categories and regions. However, the data is stored in raw format and lacks structured reporting.

Management has observed inconsistencies in Quarter 1 sales growth between 2022 and 2023, but there is no consolidated view available to clearly identify:

- Which regions are underperforming
- Which product categories contribute most to revenue
- Whether profit margins are improving or declining
- How monthly performance compares year-over-year

Due to the absence of an executive-level dashboard, decision-makers are relying on manual data review, which increases the risk of delayed or inaccurate strategic decisions.

If this issue is not addressed, the organization may:

- Misallocate marketing budgets
- Overlook declining product performance
- Miss growth opportunities in high-performing segments

Therefore, a structured sales performance analysis and interactive dashboard is required to provide data-driven insights for Q1 performance evaluation.

Business Objectives

The objectives of this project are:

1. To analyze Quarter 1 sales performance for 2022 and 2023.
2. To calculate total revenue and profit margin for both years.
3. To identify year-over-year sales growth trends.
4. To evaluate product category and regional performance.
5. To provide management with an interactive dashboard for decision-making.
6. To support data-driven strategy planning for future quarters.

Project Scope

In Scope

The following activities are included within the scope of this project:

- Analysis of Quarter 1 sales data for 2022 and 2023
- Calculation of total revenue, profit, and profit margin
- Year-over-Year comparison analysis
- Monthly performance breakdown (January, February, March)
- Product category performance evaluation
- Regional sales analysis
- Development of an interactive Excel dashboard
- Creation of PivotTable-based product analysis report

Out of Scope

The following items are not included in this project:

- Forecasting beyond Quarter 1
- Operational process improvement
- Marketing strategy redesign
- Data from other business units
- Automation using advanced BI tools (e.g., Power BI, Tableau)

Stakeholder Identification

The following stakeholders have been identified for the Q1 Sales Performance Analysis project:

1. Executive Management Team

- Interest: Strategic decision-making
- Need: High-level KPI dashboard and growth insights

2. Sales Manager

- Interest: Regional and category performance
- Need: Target achievement analysis

3. Finance Department

- Interest: Profit margin and revenue accuracy
- Need: Verified sales and cost calculations

4. Business Analyst (Project Owner)

- Role: Data analysis and dashboard development
- Responsibility: Requirement gathering and reporting

5. IT / Data Support Team

- Interest: Data availability and system integrity
- Need: Accurate and structured data sources

Power–Interest Matrix

	High Interest	Low Interest
High Power	Executive Management Sales Manager	Finance Head
Low Power	Regional Sales Team	IT Support

Stakeholder Mapping – Power vs Interest

Stakeholder	Role/Department	Power Level	Interest Level	Engagement Strategy
Executive Management	Leadership Team	High	High	Manage Closely
Sales Manager	Sales Department	High	High	Manage Closely
Finance Head	Finance Department	High	Low	Keep Satisfied
Regional Sales Team	Sales Operations	Low	High	Keep Informed
IT Support	Technical Support	Low	Low	Monitor

RACI Matrix

Activity	Business Analyst	Sales Manager	Finance Head	Executive Management	IT Support
Requirement Gathering	R	C	C	I	I
Data Cleaning	R	I	C	I	C
Sales Analysis	R	C	C	I	I
Dashboard Development	R	I	I	I	C
Validation & Review	R	C	C	A	I
Final Presentation	R	C	I	A	I

Root Cause Analysis (5 Why Technique)

Problem: Management lacks visibility into Q1 sales performance.

Why 1: Why is visibility lacking?

→ Because data is stored in raw format without summary reporting.

Why 2: Why is data not summarized?

→ Because no standardized dashboard exists.

Why 3: Why is there no dashboard?

→ Because reporting is done manually using spreadsheets.

Why 4: Why is reporting manual?

→ Because no structured analysis process was implemented.

Root Cause Identified:

Absence of a centralized reporting framework and interactive dashboard.

Recommended Solution: Implement a centralized Excel-based KPI dashboard with automated calculations and structured reporting.