

Tableau User Story | Sales Performance

Introduction

This user story outlines the specifications for building two dashboards using Tableau to help stakeholders, including sales managers and executives, analyze sales performance and customer behaviour.

Sales Dashboard | Requirements

Dashboard Purpose

The purpose of the Sales Dashboard is to present an overview of sales metrics and trends in order to analyse year-over-year sales performance and understand sales trends.

Key Requirements

- KPI Overview
 - Display a summary of total sales, profits, and quantity for the current year and the previous year.
- Sales Trends
 - Present the data for each KPI on a monthly basis for both the current and previous year.
 - Identify months with highest and lowest sales and make them easy to recognize.
- Product Subcategory Comparison
 - Compare sales performance by different product subcategories for the current and previous year.
 - Include a comparison of sales with profit.
- Weekly Trends for Sales & Profit
 - Present weekly sales and profit data for the current year.
 - Display the average weekly values.
 - Highlight weeks that are above and below average to show performance trends.

Customer Dashboard | Requirements

Dashboard Purpose

The Customer Dashboard aims to provide an overview of customer data, trends, and behaviours. It will help marketing teams and management understand customer segments and improve customer satisfaction.

Key Requirements

- KPI Overview
 - Display a summary of total number of customers, total sales per customer, and total number of orders for the current and previous year.
- Customer Trends
 - Present data for each KPI on a monthly basis for both the current and previous year.
 - Identify months with highest and lowest sales and make them easy to recognize.
- Customer Distribution by Number of Orders
 - Represent the distribution of customers based on the number of orders they have placed. This provides insight into customer behavior, loyalty, and engagement.
- Top 10 Customers By Profit
 - Present the top 10 customers who generated the highest profits.
 - Include information such as rank, number of orders, current sales, current profit, and last order date.

Design & Interactivity Requirements

- Dashboard Dynamic
 - Allow users to select any year for historical data.
 - Enable easy navigation between dashboards.
 - Charts and graphs should be interactive with filtering capabilities.
- Data Filters
 - Allow filtering by product details (category, subcategory) and location (region, state, city).