Excel Project Documentation

1. Project Overview

Project Title: KPI & Sales Performance Dashboard (Excel)

Objective:
The objective of this project is to design an interactive Excel dashboard that provides clear visibility into sales performance and key performance indicators (KPIs). The dashboard helps management track total sales, target achievement, performance trends, and identify high and low performers for better decision-making.

Problem Statement:
The organization faced difficulty in monitoring sales performance and KPI achievement using raw Excel sheets. Manual calculations were time-consuming, error-prone, and lacked visual clarity. This project solves the problem by converting raw data into a structured, automated, and interactive dashboard.

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2. Data Description

Data Source:
Internal sales and performance data maintained in Excel.

Data Volume:
The dataset includes multiple sales executives, regions, daily sales data, targets, and calculated KPIs across a defined time period.

Data Fields Used:

- Employee Code
- Sales Executive Name
- Region
- Daily Sales (Day 1 – Day N)
- Total Sales
- Target
- Target Hit %
- Away From Target %
- KPI Score
- KPI Rating

Data Cleaning:

- Removed blank and duplicate entries
- Standardized numeric formats
- Validated target and sales values

- Created calculated columns using Excel formulas

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3. Target Audience

Audience:

- Sales Managers
- Business Analysts
- Regional Heads
- Senior Management

Use Case:
The dashboard is used to monitor sales performance, evaluate KPI achievement, compare executives, and support performance-based decision-making.

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4. Key Features

KPIs Displayed:

- Total Sales
- Target Achievement Percentage
- KPI Score
- KPI Rating (Excellent / Good / Average / Poor)

Visualizations:

- Bar Chart: Sales by Sales Executive
- Bar Chart: Sales by Region
- KPI Cards: Total Sales, Target Hit %, KPI Score
- Ranking Table: Sales Executive Performance

Interactive Elements:

- Slicers for Region
- Slicers for Sales Executive

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5. Tools, Techniques & Automation

Tools Used:

- Microsoft Excel
- Power Pivot (for data modeling)
- Pivot Tables & Pivot Charts
- Visual Basic for Applications (VBA)

Techniques Applied:

- Advanced Excel formulas (SUMIFS, IF, VLOOKUP/XLOOKUP)
- KPI calculations and conditional logic

- Conditional formatting for KPI ratings
- Pivot Tables and slicers for interactivity
- VBA Macros for slicer automation and dynamic pivot control

VBA Automation Description:
A VBA macro was implemented to dynamically connect and disconnect slicers with multiple Pivot Tables using checkbox-based logic. This automation improves dashboard performance, reduces slicer duplication, and gives users better control over how filters affect individual visuals.

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6. Project Scope

Scope:

- Sales and KPI analysis based on available internal data
- Performance tracking at executive and regional level
- Interactive dashboard with automated slicer control

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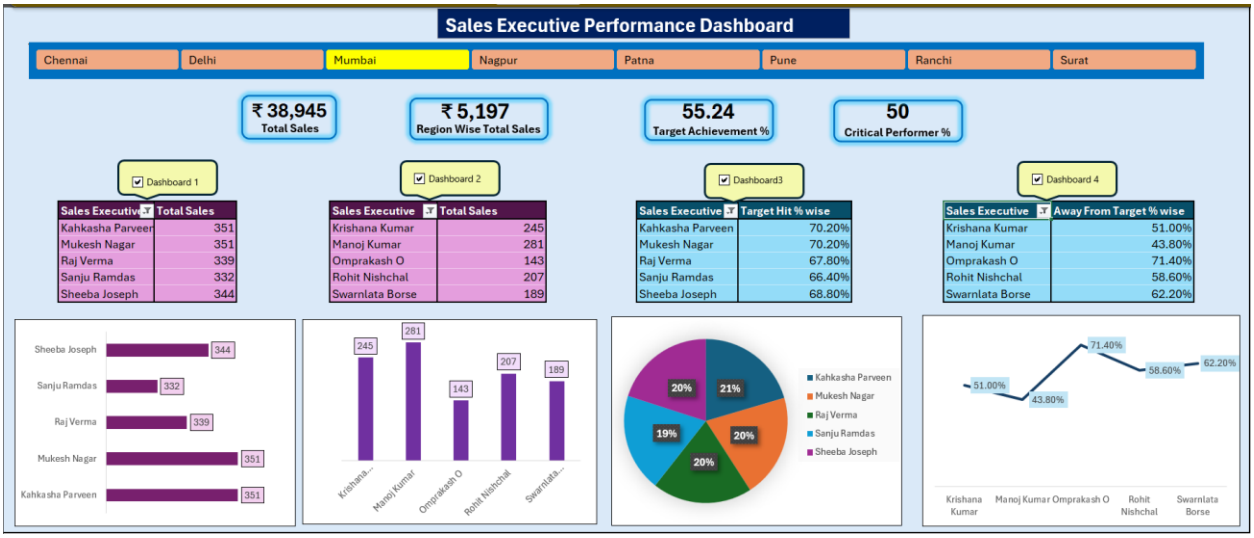
7. Outcome / Expected Results

The dashboard provides a consolidated view of sales and KPI performance, reduces manual effort, improves reporting accuracy, and enables faster decision-making through clear visual insights and automation.



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8. Future Enhancements

- Integration with Power BI for advanced analytics
- Automated data refresh from external sources
- Monthly and quarterly trend analysis
- Predictive sales forecasting using historical data