Executive Summary

This report evaluates the performance of the company in 2022 using Tableau dashboards, focusing on key metrics such as sales growth, profitability, operational efficiency, market trends, and customer behavior from 2020 to 2023. The findings offer actionable insights aimed at optimizing business operations and guiding strategic decision-making.

Key Findings:

1. Sales Performance: Total sales reached £3.4M, a 27.6% increase from 2021, with Furniture, Technology and Office Supplies all contributing significantly. The company leads in sales performance, with Technology being the highest contributor in profit margins.
2. Operational Efficiency: Standard Class shipping dominated orders, accounting for 60% of the volume, while Same Day delivery remained a premium service. However, Standard Class exhibited significant fluctuations, impacting consistency in delivery times.
3. Market Trends: The APAC region experienced a 28% increase in sales in 2022, driven primarily by strong performance in Oceania, while Central Asia exhibited lower sales, highlighting an opportunity for growth in that area.
4. Customer Behavior: Customer retention was strong, with noticeable peaks in the middle and end of the year. Most orders came from the Consumer segment, with the USA leading in sales, while other regions showed varying levels of performance, highlighting areas for potential growth.
5. Product Profitability: The company experienced strong profitability, driven by high-margin products. Moderate discounts positively impacted profits, especially mid-year and towards the end of the 2022.

Recommendations:

* Focus on expanding the Furniture and Technology categories, ensuring targeted marketing efforts in high-performing months, such as June and December.
* Address the fluctuations in Standard Class delivery by optimizing delivery speeds and streamlining operations, improving consistency across shipping modes.
* Expand operations in Central Asia to boost sales in this underperforming region, while continuing to capitalize on high-performing markets like Oceania.
* Review discount strategies to optimize profitability, especially for Furniture, and avoid excessive discounts that may erode margins.
* Continue nurturing customer loyalty through targeted engagement strategies, focusing on retaining high-value customers and improving retention rates during slower months.

By implementing these recommendations, the company can ensure conditioned growth, profitability, and operational efficiency while maintaining a strong market position.

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## Introduction

In today’s dynamic business environment, using data to draw accurate conclusions has become an integral part for making business decisions. This report analyzes a company using Tableau dashboards to identify key growth indicators. The main objective is to provide effective conclusions to optimize business operations by analyzing company performance using data-driven visualizations.

Through five distinct Tableau dashboards, the report examines a wide range of critical aspects, including overall sales performance, shipping efficiency, profitability analysis, market trends, and customer behavior patterns. These visualizations are designed to provide visibility, enabling the identification of trends and anomalies in business performance, with an emphasis on data-driven decision-making.

## Findings

### Sales Performance Dashboard

The Sales Performance Dashboard provides a comprehensive analysis of the company’s core indicators in 2022 and detailed understanding of sales growth, profitability, and customer behavior with the previous year (2021). It gives a company the visibility to monitor the performance of products in the three different categories, such as Furniture, Technology, and Office Supplies, offering thorough insights into their individual performance across the year.

All three metrics show steady growth. Sales increasing by 27.6% compared to 2021, reaching a total of £3,402,238, while Profit grew by 33.1%, totaling £407,111. Meanwhile, Sales per Customer saw a modest increase by 0.2%, bringing the figure to £2,340.

The line charts within dashboard highlight growth patterns throughout the year, with notable periods of increased performance observes in June, September and December. However, the sharp decline in April and July, which stands out as an anomaly amidst the overall positive trend.

The Sales by Category section of the dashboard provides valuable insights into product performance. Furniture sales reached £1,117,433, showing a 30.4% increase, while Technology performed strongly with sales of £1,270,134. Both saw the most significant increases in sales and profitability. In contrast, Office Supplies demonstrated consistent and steady revenue stream, which, while not experiencing the same explosive growth as the other categories, remains crucial for maintaining a diversified and balanced product portfolio.

### Operational Efficiency Dashboard

The Operational Efficiency Dashboard provides an insightful analysis of how the company’s deliveries are performing in terms of both speed and volume. It gives an overview of the 4 shipping modes used, such as ‘Same Day’, ‘First Class’, ‘Second Class’, and ‘Standard Class’, breaking down their contribution to total sales and orders throughout 2022.

Standard Class is the most widely used, accounting for 60% of orders, while Same Day Delivery makes up only 5%, reflecting its premium nature. This is followed by First Class and Second Class, which account for 14% and 21% of orders, respectively.

All shipping modes experienced spikes in July, followed by strong growth towards the end of the year. This indicates a noticeable seasonal pattern in demand, with a sharp increase in sales in the later months. Standard Class stands out as the most profitable, though it has significant fluctuations throughout the year. Despite the fluctuations, it consistently contributed the most to total sales.

Average Days to Ship indicate the difference in speed across delivery modes, with Same Day and First Class delivery being the fastest globally. Standard Class has the longest average shipping times, which is something that could potentially affect customer satisfaction and profitability, as slower deliveries may lead to customer churn.

The Order Details section provides a closer look at individual orders and shipping dates, highlighting areas where delivery times varied significantly. These fluctuations in delivery speed, along with regional differences, can offer insights into areas for improvement, especially in terms of optimizing the efficiency of delivery processes across different markets. Identification of these key patterns is essential for managing customer expectations and aligning shipping promises with actual performance.

### Market Insights Dashboard

The Market Insights Dashboard provides a detailed view of the company’s sales performance in the specific market (APAC) for 2022, with an impressive 28% increase from 2021.

The chart Current Year Sales vs. Previous Year Sales clearly shows the peaks in sales in June, followed by another noticeable rise in August, indicating specific months with strong growth. The data also highlights that the company performed well overall in 2022 in the APAC region, with sales reaching £972,325.

The Sales per Region section highlights the four main regions in the APAC market: Central Asia, North Asia, Southeast Asia, and Oceania. Oceania stands out as the highest performing region, generating the most sales, followed by North Asia and Southeast Asia. Central Asia, while contributing to the overall growth, recorded lower sales figures in comparison.

This dashboard allows the company to track performance on a regional level, offering insights into which areas showed the most promise and where improvements can be made to boost sales further.

### Customer Behavior Dashboard

The Customer Behavior Dashboard provides a comprehensive view of the company’s customer dynamics in 2022. It focuses on key metrics such as Total Customers, Average Sales per Customer, Customer Segmentation, and Customer Retention trends, offering insights into the company’s sales performance and loyalty metrics.

The Total Customers section indicates that there were 1,454 customers in 2022. The Sales per Customer metrics highlights an average of £2,340, showing a positive trend. The Customer Segments analysis demonstrates that most of the orders came from the Consumer segment, followed by the Corporate and Home Office segments.

The Customer & Sales by Country map visually represents the global distribution of customers and sales, with varying densities of customer concentration. The map uses a diverging color scale, where red indicates the regions with lower sales, transitioning through yellow to green, which represents areas with higher sales. This color gradient clearly highlights where the company’s sales are weakest and strongest, providing a quick visual reference for identifying the potential for growth.

The Customer Retention & Order Trends chart reveals significant growth in the retention rate, with noticeable dips in July and October, while peaking in June, September, and at the end of the year. The number of orders remained stable throughout the year, with only slight fluctuations in the Home Office segment, particularly at the beginning and middle of the year.

### Product Profitability Dashboard

The Product Profitability Dashboard provides a detailed breakdown of product profitability in 2022. It highlights the top ten most profitable products, with the ‘Canon imageCLASS 2200 Advanced Copier’, ‘Motorola Smart Phone, Full Size’, and ‘Cisco Smart Phone, Full Size’ leading the way. On the other hand, the top ten least profitable products include the Cubify CubeX 3D Printer Double Head Print and the Motorola Smart Phone, Cordless. This helps the company focus on high-performing products while evaluating and possibly rethinking low-profit items.

The Impact of Discount on Profit chart reveals that increasing discounts significantly affects profitability, with the most considerable positive impact seen in products with moderate discounts. Such insight is critical for optimizing discount strategies to increase profitability without sacrificing too much margin.

In terms of Monthly Profit and Discounts Trends, the data shows consistent monthly trends in profit, with a notable increase in profits during the middle of the year (June), despite the average discount staying relatively stable at 13-14% throughout the months.

The Profitability of Sub-Categories section shows that certain product categories, such as Paper, Labels, and Envelopes, have higher profit ratios. Conversely, Tables exhibit negative profitability, reflecting underperformance in that sub-category, which allows for more targeted decisions on resource allocation and inventory management.

## Recommendations

To further optimize performance the company should continue capitalizing on the strong growth seen in key product categories, especially Furniture and Technology, which have shown significant year-over-year increases. Expanding marketing efforts and promotional activities for these categories during high-performing months, such as June, September, and December, will help sustain this growth. It is also important to maintain the steady performance of Office Supplies, ensuring that it remains a stable contributor to the overall sales mix.

The company should prioritize addressing the fluctuations observed in Standard Class delivery. While it is the most profitable shipping mode, its variability throughout the year can impact customer satisfaction and profitability. By streamlining the delivery process, reducing delays, and improving the consistency of delivery times, the company can better meet customer expectations and strengthen its position in the market. Additionally, optimizing the slower shipping times for Standard Class help retain customers who may be deterred by long waits.

Efforts to improve sales in underperforming regions, particularly Central Asia, should be considered. Focusing on expanding operations and marketing initiatives in these regions, while continuing to build on the strengths of high-performing areas like Oceania, could lead to further market penetration and sales growth.

Finally, improving customer retention, especially during the months when retention rates dropped, can be achieved through enhanced loyalty programs and targeted engagement strategies. By focusing on profitable product categories and addressing underperforming ones, the company can optimize its resource allocation and improve overall profitability.