

Sales Dashboard Project Report

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1. Introduction / Objective

This project aims to develop an interactive sales dashboard using Microsoft Excel to analyze and present 2024 sales data across various products, regions, and sales personnel. The goal is to simplify data interpretation and support data-driven business decisions.

2. Dataset Description

The dataset used for this project includes detailed sales records with the following fields:

- Product (e.g., Keyboard, Laptop, Monitor, etc.)
- Sales Person (e.g., Alice, Bob, Charlie, Diana, Ethan)
- Units Sold
- Total Sales (in INR)
- Profit (in INR)
- Region (East, West, North, South)

The dataset was preprocessed in Excel to ensure consistency, remove duplicates, and standardize data types.

3. Methodology / Tools Used

Microsoft Excel 2024 was used to process the data and build the interactive dashboard. Key Excel features utilized include:

- Pivot Tables for summarizing data
- Charts (Line, Bar, and Pie) for visual insights
- Slicers to enable dynamic filtering
- Conditional formatting to highlight KPIs
- Basic formulas for KPI calculation (e.g., SUM, AVERAGE)

4. Dashboard Overview

The Excel dashboard includes the following components:

- KPI Cards: Displaying Total Sales, Units Sold, Profit, and Average Sales
- Line Chart: Units Sold by Product
- Pie Chart: Sales Distribution by Region
- Bar Charts: Total Sales by Product and by Sales Person
- Slicers: Enable filtering by Region, Product, and Sales Person

5. Key Findings / Insights

- West region generated the highest sales: ₹2230.15 L
- Monitor was the top-selling product by revenue: ₹1957.79 L
- Ethan was the most successful salesperson: ₹1925.87 L
- Overall Sales: ₹84,92,69,422.76 | Units Sold: 13,230 | Total Profit: ₹18,02,47,623.96 | Average Sales: ₹16,98,538.85

6. Interpretation & Decision Making

The dashboard enables management to quickly identify high-performing products and regions, monitor team performance, and optimize resource allocation. Insights can guide promotional strategies and sales training programs.

7. Limitations

- Data is limited to the year 2024; trends over time are not considered.
- Regional boundaries and product categories may not align with actual business units.

- Excel has limitations in scaling with very large datasets.

8. Conclusion

This project effectively demonstrates how Excel can be used to build a dynamic and informative sales dashboard. The insights gained support better business decision-making and highlight opportunities for improvement. Future work may include integrating additional years of data and automating report generation.

9. Appendix / References

- Dashboard Screenshot (attached below)
- Internal 2024 Sales Dataset (Excel file)
- Tools: Microsoft Excel 2024

