

## Performance Dashboard Analysis Report - Detailed Overview

### Business Context:

This report analyzes the sales performance and business operations based on a dashboard of medical product sales data. The goal is to evaluate current trends, identify growth opportunities, and recommend feature improvements to drive sustainable business growth.

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## 1. Executive Summary

The dashboard captures essential KPIs over a one-year period. The company has generated:

- **1,307 Total Orders**
- **1 Million Units in Quantity**
- **₹87.47 Million in Revenue**
- **269 Unique Buyers**
- **Average Order Quantity:** 420.5 units

This signifies a high-volume sales model, dominated by a few key buyers, products, and regions. While performance is strong, dependency on certain channels and products reveals areas for diversification and optimization.

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## 2. Monthly Order Trends

### Observations:

- **Peak Order Month:** September (141 orders)
- **Lowest Month:** November (81 orders)
- **Trend:** The business experiences a fluctuating monthly order pattern with a strong surge mid-year followed by a steep drop.

### Detailed Insights:

- There was an upward trend from May (129) to September (141), suggesting successful seasonal or promotional campaigns.
- A significant dip in October and November may indicate operational challenges, demand fluctuations, or insufficient marketing push post-festive seasons.

#### **Recommendations:**

- Implement quarterly sales forecasting to prepare for demand shifts.
  - Launch end-of-year retention campaigns.
  - Study external factors such as regulatory or climate-related issues that might affect ordering.
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### **3. Product-Wise Order Distribution**

#### **Top Performing Product:**

- **Ka Je Vo 1** with 425 orders (32% of total product orders)

#### **Other Notable Products:**

- Su Ka Tab (107 orders)
- Ex Su Ta (86 orders)
- Su 100 mg, Ce 100 mg, Vi 20 mg, and Ka Go 100 mg (all 70+ orders)

#### **Detailed Analysis:**

- The product portfolio shows a heavy skew toward Ka Je Vo 1, which may indicate market over-reliance.
- Products like Su Ta and Ka Or Je are underperforming (<75 orders).

#### **Improvement Actions:**

- Introduce combo or bundled offers pairing high and low-performing products.
  - Highlight benefits of low-selling items via marketing campaigns.
  - Gather customer feedback on less popular products to understand barriers.
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## **4. Buyer Insights**

### **Top Buyers:**

- Un Me Ag (72 orders)
- No Gl So Pvt Ltd (59 orders)
- Ja Me an Co and Pa Ph (48 each)

### **Detailed Patterns:**

- The top 10 buyers contribute nearly 30% of all orders.
- Long-tail buyers (below 30 orders/year) dominate volume but not value.

### **Recommendations:**

- Introduce a tiered loyalty system to retain top buyers and activate low-engagement ones.
  - Conduct regular follow-ups for long-tail buyers to convert them into regular customers.
  - Provide personalized offers based on buyer order history.
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## **5. Geographical Performance**

### **Top Locations:**

- **Delhi:** 943 orders (dominant)
- **Maharashtra:** 543 orders

- Other states like UP (168), Haryana (154), and Gujarat (125) trail significantly.

**Observations:**

- The business is heavily concentrated in Delhi, representing over 70% of orders.
- Presence in other states is moderate, indicating untapped potential.

**Expansion Strategy:**

- Launch local reseller programs or partner distributors in Uttar Pradesh and Gujarat.
  - Utilize geo-targeted online ads to raise awareness in low-performing areas.
  - Organize medical outreach programs or seminars to educate new customers.
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## **6. Sales Channel Performance**

**Major Contributor:**

- **Varsha 2K** channel with 76% share (approx. 993 orders)

**Others:**

- Monica (8%), Neha (9%), Excel Team (3%) contribute limited orders.

**Risks Identified:**

- Business heavily depends on one sales executive or channel.

**Strategic Recommendations:**

- Provide equal training and incentive structure across all channels.
- Set quarterly KPIs for each sales representative.
- Use dashboards to track individual and team sales performance regularly.

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## 7. Platform Performance

### Highest Platform Orders:

- **Indiamart:** 640 orders (50%)
- Followed by: Reference (229), Sales Calls (144), WA Marketing (113), Website (97)

### Observations:

- Indiamart remains a key discovery platform, but direct website orders are minimal.

### Improvement Plan:

- Optimize website SEO and invest in Google ads to increase visibility.
- Introduce WhatsApp Bot for real-time support and order taking.
- Improve post-click experience from marketing campaigns to boost conversions.

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## 8. Feature Improvements & Automation Opportunities

Area	Feature Suggestion	Benefit
CRM	Integrate CRM system	Better buyer tracking & sales follow-up
Inventory Sync	Real-time inventory integration	Prevents overstock/stockouts
Feedback Tool	Add post-order reviews	Helps improve product offerings
Smart Discounts	AI-based discount engine	Dynamic offers to increase cart size
WhatsApp Bot	Auto customer service & order taking	Streamlined buyer experience
Sales Dashboard	Individual KPI monitoring	Performance tracking by team member

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## 9. Strategic Growth Initiatives

### 1. Sales Channel Expansion:

- Reduce reliance on single rep (Varsha 2K).
- Recruit and train more field agents.

### 2. Customer Retention Plan:

- Introduce loyalty points.
- Run reactivation campaigns for buyers inactive for 3+ months.

### 3. Digital Presence Strengthening:

- Launch app with order tracking, catalog & alerts.
- Collect buyer data via forms and surveys.

### 4. Product Diversification:

- Add related OTC or B2C offerings.
- Identify market gaps in buyer location trends.

### 5. Data Utilization:

- Weekly performance snapshots.
- Build predictive analytics model to anticipate demand.

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## 10. Conclusion

This report highlights a strong foundation but identifies areas for improvement in sales diversification, digital presence, customer retention, and automation. By making data-driven decisions and expanding into underrepresented regions and channels, the business can further scale its operations and solidify market leadership.