Enterprise Sales & Revenue Analytics

1. Business Statement & Objectives

Business Statement:

The Global Sales organization needs a unified dashboard to monitor revenue performance, identify product trends, and support data-driven decision making.

Objectives:

1. Create consolidated sales metrics across regions and channels.
2. Enable trend analysis (YoY growth, rolling averages).
3. Provide forecasting for next quarter revenue.
4. Implement robust security to restrict regional data.

Deliverables:

- Interactive Power BI report with key visuals.
- Published dashboard with incremental refresh & RLS configured.

2. Requirements Gathering

Key Stakeholders:

- VP of Sales
- Regional Sales Directors
- Finance Team

Discussion Points:

- Regional Breakdowns: Country > Region > Global
- Time Granularity: Daily detail with monthly summaries
- Currency Conversion: Real-time FX rates vs. monthly averages
- Forecast Horizon: Next 3 months using ETS method
- Security: RLS by region contact mapping

3. Dashboard Layout

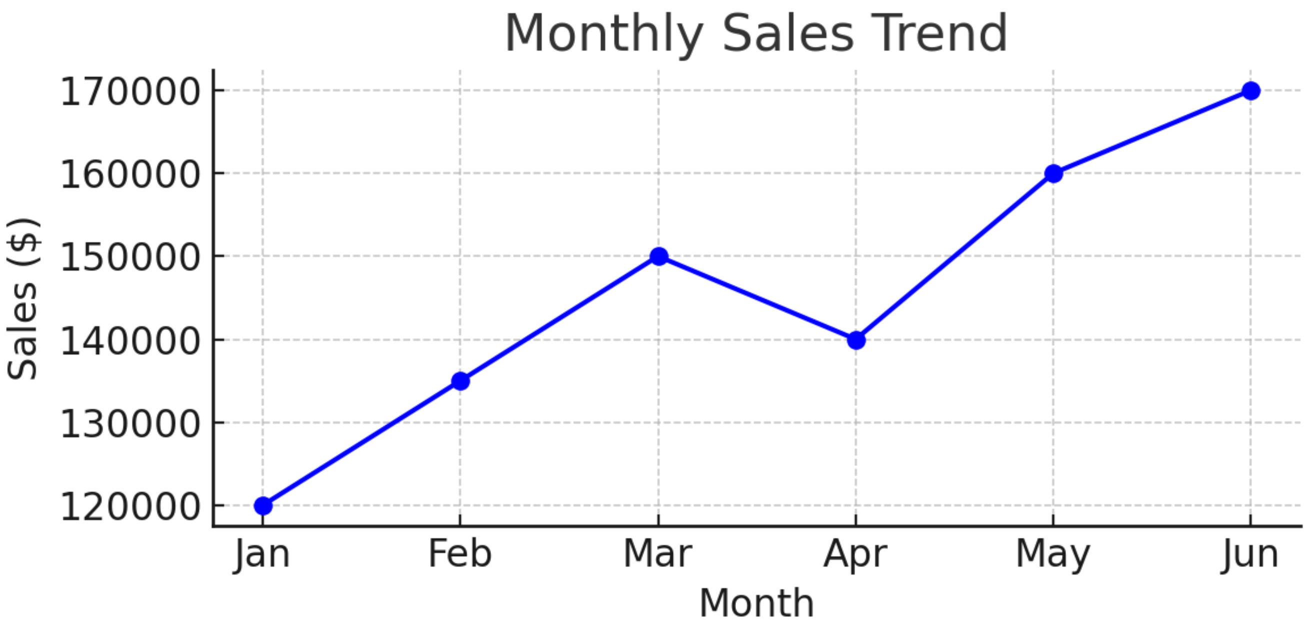
Filters (Slicers):

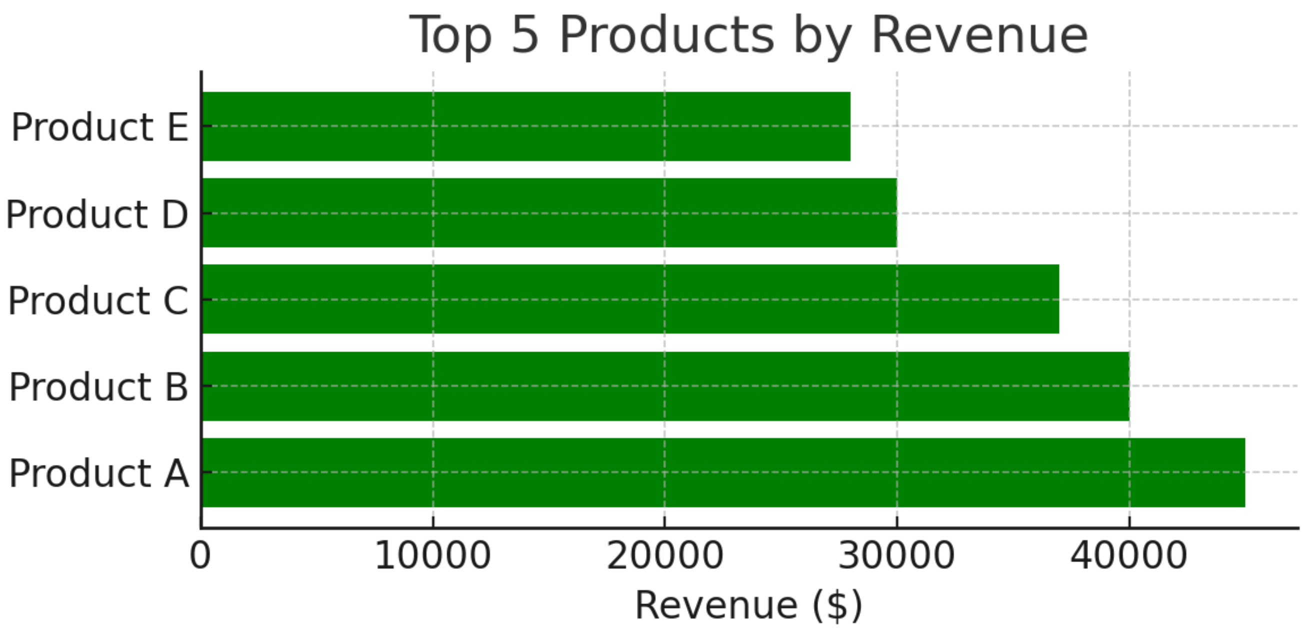
- Date Range: Select specific time periods
- Region: Focus on continents, countries, or custom groupings
- Currency: Switch between USD, EUR, GBP, etc.

Key Performance Indicators (KPIs):

- Total Sales: Cumulative revenue for the selected period
- Year over Year: % change compared to the same period last year
- Rolling 12 Month: Sum of sales over the most recent 12 months
- Next Quarter Forecast: Projected sales for the upcoming quarter

4. Sample Visuals





5. Data Sources & Owners

- ERP System (SQL Server): John Smith, ERP Applications Lead
- CRM (Salesforce): Jane Doe, CRM Operations Manager

- Price Lists (Excel/SharePoint): Emily Chen, Pricing Manager
- Currency Rates (API/Flat Files): Finance Data Services Team