

SALES PERFORMANCE ANALYSIS REPORT

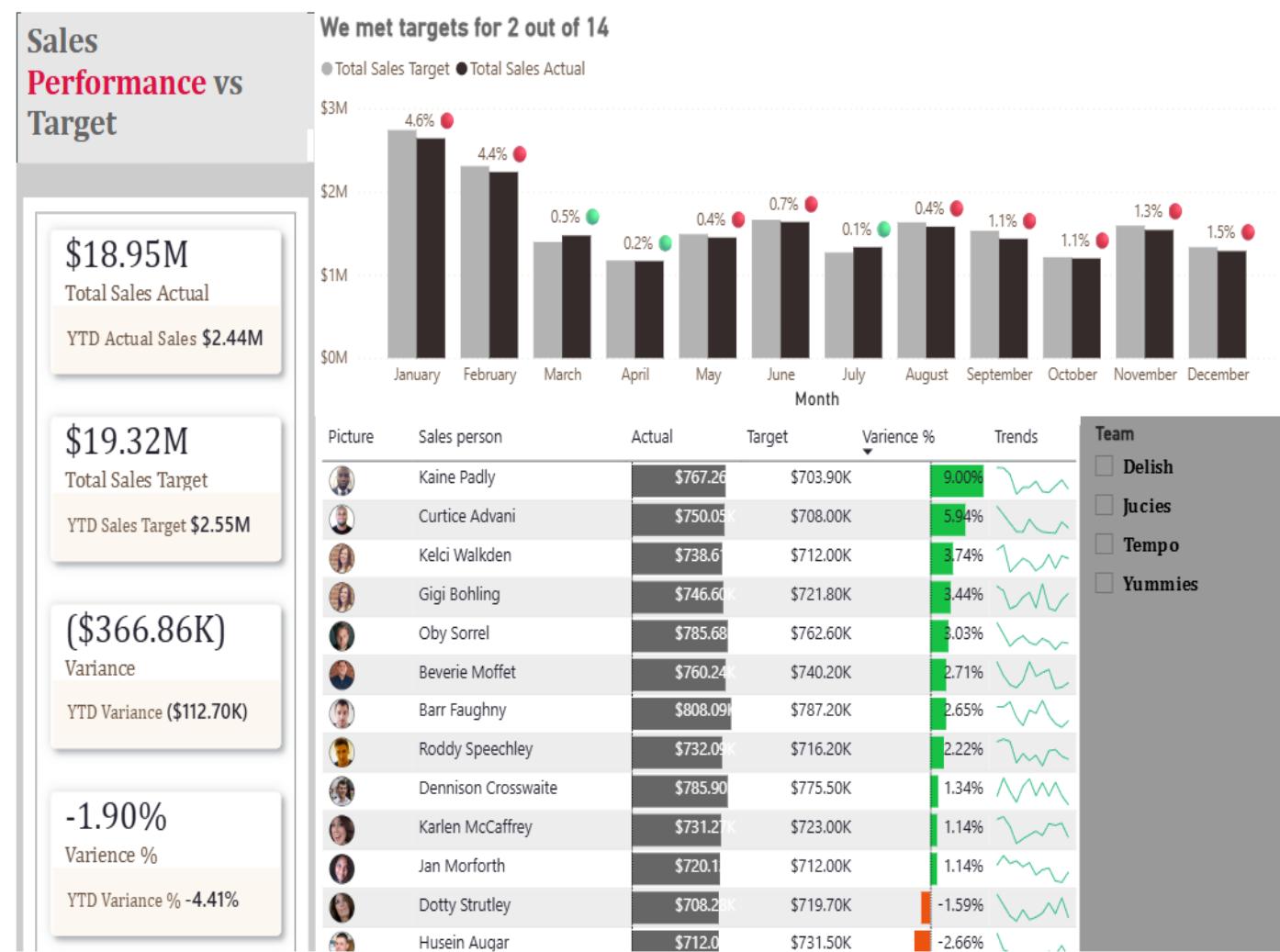
Year-to-Date (YTD) Performance vs Targets

Power BI Dashboard Analysis

1. Executive Summary

This report presents a comprehensive analysis of sales performance against established targets using a Year-to-Date (YTD) sales dashboard developed in Power BI. The analysis evaluates actual sales figures, target achievement rates, variance metrics, and performance trends over the review period. The findings indicate a concerning decline in actual sales relative to targets, with performance deteriorating consistently across several consecutive months.

The dashboard serves as a critical tool for management to identify performance gaps, assess consistency in sales execution, and support evidence-based decision-making. This analysis provides actionable insights for strategic interventions to reverse the observed negative trends.



Screenshot Instructions: Capture the entire Power BI dashboard showing all KPI cards on the left and the main chart on the right.

2. Objective of the Analysis

The primary objectives of this analytical report are to:

- Assess sales performance against predefined targets across the organization
- Identify temporal trends and specific periods of underperformance
- Measure consistency in target achievement over the review period
- Highlight key individual contributors to overall sales performance
- Provide data-driven, actionable recommendations for performance improvement

3. Data Overview and Methodology

3.1 Data Sources

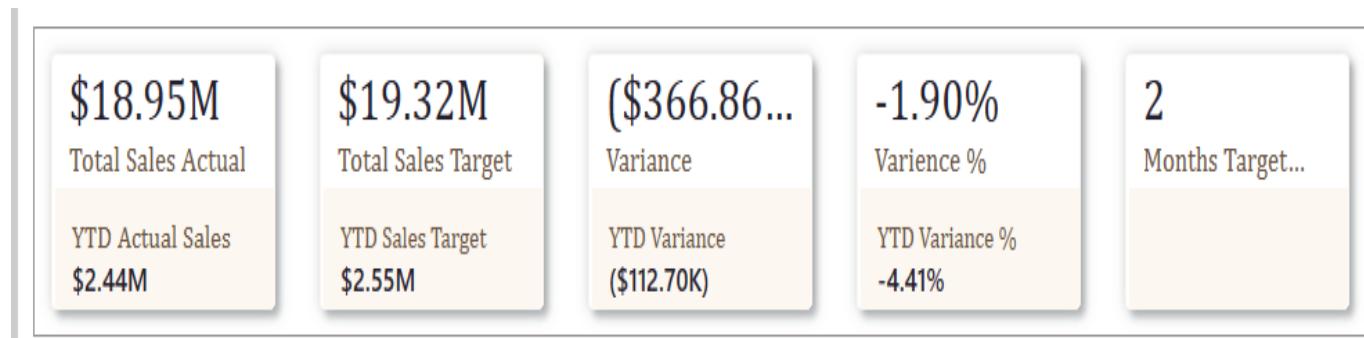
The dashboard integrates data from three primary sources:

- **Actual Sales Data:** Monthly recorded sales performance by salesperson
- **Target Sales Data:** Planned sales targets established by management for each period
- **Calendar Table:** Time-intelligence framework supporting YTD calculations, trend analysis, and monthly comparisons

3.2 Key Performance Indicators (KPIs)

The following KPIs have been calculated using DAX measures in Power BI:

- Total Sales Actual and Total Sales Target
- Variance and Variance Percentage
- YTD Actual Sales and YTD Target Sales
- YTD Variance and YTD Variance Percentage
- Months Target Reached (count of successful months)



Screenshot Instructions: Capture a close-up of the left panel showing all KPI cards: Total Sales Actual (\$18.95M), Total Sales Target (\$19.32M), Variance (\$366.86K), Variance %, and Months Target Reached (2).

4. Key Performance Indicators Analysis

4.1 Actual vs Target Sales (YTD)

Analysis of the dashboard reveals that YTD Actual Sales are currently below YTD Sales Target, resulting in a negative variance. Based on the visible data:

- **Total Sales Actual:** \$18.95M
- **Total Sales Target:** \$19.32M
- **Variance:** -\$366.86K (negative)
- **Variance Percentage:** -1.90%

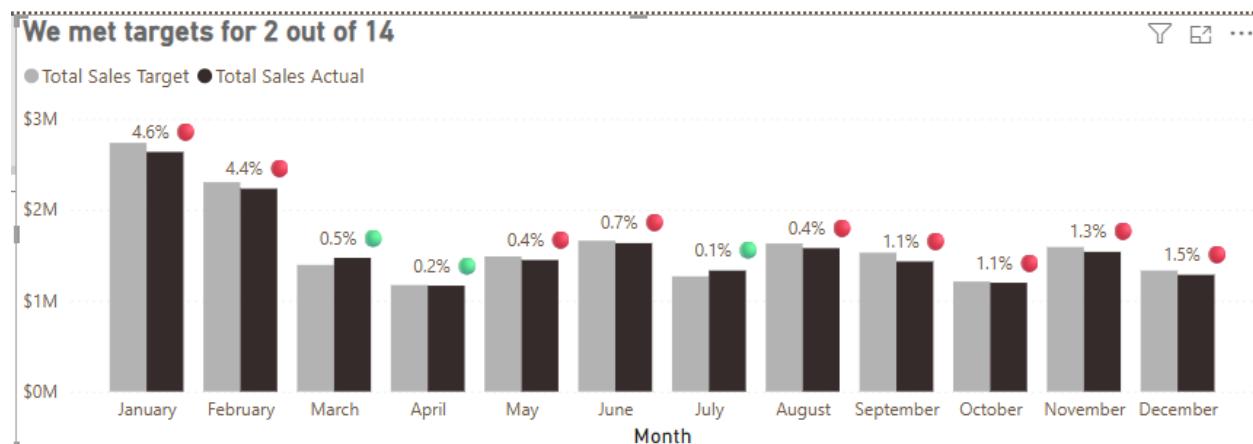
This performance gap indicates that sales execution has not met planned expectations for the period under review. The YTD Variance percentage confirms that the decline in actual sales is more pronounced than any corresponding adjustment in targets, suggesting systemic execution challenges rather than unrealistic goal-setting.

4.2 Sales Performance Trend Analysis

Temporal trend analysis of the monthly performance chart reveals critical insights:

- **January and February 2024:** Both months showed actual sales exceeding targets (indicated by green dots above the bars), with variance percentages of +4.0% and +4.4% respectively
- **March onwards:** Beginning in March, actual sales began falling below targets consistently, marking the start of a sustained downward trend
- **November-December period:** The most recent months show variance percentages of -1.1% and -1.5%, indicating performance deterioration continues

This pattern suggests structural performance issues rather than temporary market fluctuations or seasonal variations. The consistent underperformance across ten consecutive months indicates systematic challenges requiring immediate management attention.



Screenshot Instructions: Capture the bar chart showing monthly performance (January through December).

4.3 Target Achievement Consistency

The dashboard header indicates that targets were met for only 2 out of 14 months during the analysis period. This represents a target achievement rate of approximately 14.3%, which falls significantly short of acceptable performance standards.

Key observations regarding consistency:

- Only the first two months (January and February) achieved targets
- The remaining 12 months showed persistent underperformance
- No recovery trend is visible in recent months, suggesting interventions have been insufficient

This inconsistent performance pattern increases cumulative YTD variance and reduces confidence in forecast accuracy for future periods.

4.4 Salesperson Performance Analysis

Individual performance analysis reveals significant variation among sales team members. The salesperson table shows:

Top Performers (Exceeding Targets)

- Kaine Paddy:** +9.00% variance (highest performer)
- Curtis Andani:** +5.94% variance
- Kaci Walkden:** +3.74% variance
- Gigi Bohling:** +3.44% variance

Moderate Performers (Near Target)

- Several team members performing within -3% to +3% of target, including Oby Sorrel, Beverie Moffet, and Barr Faughny

Underperformers (Significant Gaps)

- Mallorie Weber:** -11.56% variance (lowest performer)
- Rafaelita:** -9.19% variance
- Camila casstle:** -6.84% variance
- Brien:** -6.73% variance

This performance distribution indicates that underperformance is concentrated among specific salespersons rather than being evenly distributed across the team. This pattern suggests that targeted interventions focused on skill development, territory realignment, or resource allocation may be more effective than broad, uniform initiatives.

Picture	Sales person	Actual	Target	Variance %	Trends	Team
	Kaine Paddy	\$767.26	\$703.90K	9.00%		Delish
	Curtice Advani	\$750.05	\$708.00K	5.94%		Jucies
	Kelci Walkden	\$738.6	\$712.00K	3.74%		Tempo
	Gigi Bohling	\$746.60	\$721.80K	3.44%		Yummies
	Oby Sorrel	\$785.68	\$762.60K	3.03%		
	Beverie Moffet	\$760.24	\$740.20K	2.71%		
	Barr Faughny	\$808.09	\$787.20K	2.65%		
	Roddy Speechley	\$732.09	\$716.20K	2.22%		
	Dennison Crosswaite	\$785.90	\$775.50K	1.34%		
	Karlen McCaffrey	\$731.27K	\$723.00K	1.14%		
	Jan Morforth	\$720.1	\$712.00K	1.14%		
	Dotty Strutley	\$708.20K	\$719.70K	-1.59%		
	Husein Augar	\$712.0	\$731.50K	-2.66%		
	Gunar Cockshoot	\$846.42K	\$872.50K	-2.99%		
	Andria Kimpton	\$780.65	\$812.00K	-3.86%		
	Wilone O'Kielb	\$744.38K	\$776.80K	-4.17%		
	Jehu Rudeforth	\$706.6	\$738.80K	-4.35%		
	Madelene Upcott	\$704.60K	\$739.60K	-4.73%		
	Ches Bonnell	\$760.56	\$803.20K	-5.31%		
	Mallorie Waber	\$783.28	\$836.10K	-6.32%		

Screenshot Instructions: the table showing salesperson names, actual sales, target sales, variance percentages (with green and orange color coding), and trend sparklines. Include the team filter panel on the right (Delish, Jucies, Tempo, Yummies).

5. Key Insights and Findings

Based on comprehensive analysis of the dashboard data, the following critical insights emerge:

1. **Widening Performance Gap:** Actual sales are declining faster than targets, creating an expanding negative variance that compounds over time
2. **Sustained Negative Trend:** The downward trajectory began in March 2024 and has persisted for ten consecutive months with no signs of reversal
3. **Low Achievement Rate:** Only 14.3% of months achieved targets, indicating systemic execution challenges across the organization
4. **Concentrated Underperformance:** Performance gaps are driven primarily by specific individuals, with the bottom four performers contributing disproportionately to overall negative variance
5. **Absence of Recovery Signals:** Recent months show no improvement, suggesting current strategies are insufficient to address underlying issues

6. Business Implications and Risk Assessment

If current performance trends continue without intervention, the organization faces several critical risks:

6.1 Financial Impact

- **Revenue Shortfall:** Annual sales targets are unlikely to be met, potentially impacting shareholder value and financial forecasts
- **Budget Reallocation:** Revenue forecasts may require downward revision, necessitating budget adjustments across departments
- **Profitability Pressure:** Lower-than-expected revenue may compress profit margins if fixed costs cannot be reduced proportionally

6.2 Organizational Impact

- **Team Morale:** Persistent underperformance may negatively affect sales team morale and motivation
- **Incentive Structure Review:** Sales compensation and incentive programs may require reevaluation to ensure alignment with business objectives
- **Talent Retention Risk:** Top performers may seek opportunities elsewhere if organizational performance continues to decline

6.3 Strategic Considerations

Early identification of these performance trends through the dashboard enables proactive intervention rather than reactive correction. The ability to monitor real-time performance allows management to implement corrective measures before variance becomes irreversible.

7. Strategic Recommendations

Based on dashboard insights and performance analysis, the following evidence-based recommendations are proposed:

7.1 Immediate Actions (0-30 Days)

6. **Performance Review Meetings:** Conduct individual performance reviews with the bottom quartile of performers (those with variance below -4%) to identify specific obstacles, skill gaps, or resource constraints
7. **Best Practice Documentation:** Interview top performers (particularly Kaine Paddy with +40% performance) to document successful strategies and tactics that can be replicated across the team
8. **Dashboard Monitoring Cadence:** Establish weekly dashboard review sessions with sales leadership to track variance trends and identify early warning signals

7.2 Short-Term Initiatives (1-3 Months)

9. **Target Validation and Adjustment:** Conduct comprehensive review of current targets to validate whether they remain realistic given market conditions, competitive landscape, and resource availability. Adjust if necessary to prevent demotivation while maintaining appropriate stretch goals
10. **Focused Training Programs:** Design and implement targeted skill development initiatives addressing specific competency gaps identified through performance reviews. Consider areas such as prospecting techniques, objection handling, closing strategies, and product knowledge
11. **Peer Mentorship Program:** Pair top performers with struggling team members to facilitate knowledge transfer and provide ongoing coaching support
12. **Territory and Account Reallocation:** Analyze whether current territory assignments optimize revenue potential. Consider redistributing high-value accounts to proven performers while providing developing team members with opportunities for growth

7.3 Medium-Term Strategic Actions (3-6 Months)

13. **Compensation Structure Review:** Evaluate whether the current incentive model appropriately motivates desired behaviors and outcomes. Consider modifications to commission structures, bonus thresholds, or recognition programs
14. **Sales Process Optimization:** Conduct process mapping to identify inefficiencies in the sales cycle. Implement improvements in lead qualification, proposal development, contract negotiation, and post-sale follow-up
15. **Technology and Tools Assessment:** Review whether sales team has access to appropriate CRM functionality, sales enablement content, and analytical tools to maximize effectiveness
16. **Market and Competitive Analysis:** Conduct external research to understand whether performance challenges are driven by internal factors or external market dynamics requiring strategic pivots

7.4 Ongoing Monitoring and Adaptation

17. **Dashboard Enhancement:** Continue to refine the Power BI dashboard by adding leading indicators (pipeline health, activity metrics) alongside lagging indicators (revenue results) to enable more predictive insights
18. **Regular Performance Calibration:** Establish quarterly business reviews to assess progress against corrective action plans and adjust strategies based on results
19. **Continuous Improvement Culture:** Foster an organizational culture that views performance data as a tool for improvement rather than punishment, encouraging transparency and collaborative problem-solving

8. Technical Implementation Details

The Power BI dashboard was developed using industry-standard DAX (Data Analysis Expressions) measures to ensure accuracy, consistency, and scalability.

8.1 Core Measures Implemented

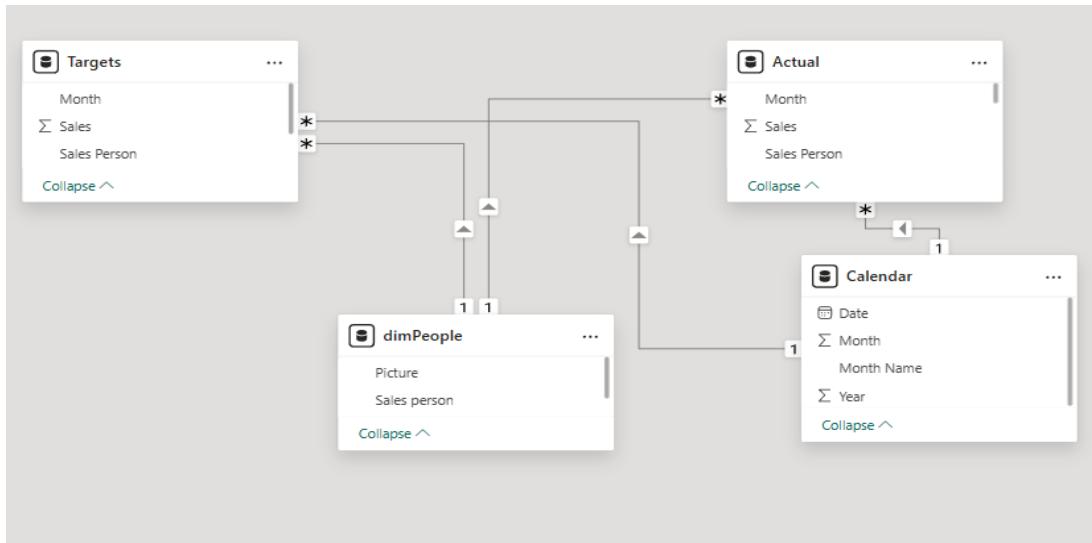
The following DAX measures form the foundation of the analytical dashboard:

- **Base Calculations:** Total Sales Actual, Total Sales Target
- **Variance Metrics:** Variance, Variance %, YTD Variance, YTD Variance %
- **Time Intelligence:** YTD Actual Sales, YTD Sales Target using DATESYTD function
- **Performance Tracking:** Months Target Reached, Target Status indicators
- **Trend Analysis:** Month-over-month percentage changes using DATEADD and CALCULATE functions

8.2 Data Model Architecture

The data model follows dimensional modeling best practices:

- **Fact Tables:** Actual sales transactions and target assignments
- **Dimension Tables:** Calendar table with fiscal periods, salesperson master data, team/organizational hierarchy
- **Relationships:** Active relationships established between fact and dimension tables to enable proper filtering and aggregation



9. Conclusion

The Power BI sales performance dashboard provides a comprehensive, actionable view of organizational sales effectiveness relative to established targets. Through systematic analysis of key performance indicators, temporal trends, and individual contributor performance, this report has identified several critical findings:

- Actual sales performance has fallen 1.90% below target on a YTD basis, representing a \$366.86K revenue shortfall
- A sustained negative trend beginning in March 2024 has persisted for ten consecutive months
- Only 14.3% of months achieved target performance, indicating systemic execution challenges
- Performance gaps are concentrated among specific team members, with the bottom quartile contributing disproportionately to overall underperformance

The analysis demonstrates that dashboard-driven insights enable data-informed decision-making and proactive management intervention. By implementing the recommended corrective actions across immediate, short-term, and medium-term timeframes, management can address underlying performance challenges, improve consistency in target achievement, and increase the probability of meeting future revenue objectives.

The Power BI platform provides the analytical infrastructure necessary for ongoing performance monitoring, trend detection, and strategic adjustment. Regular review of dashboard metrics, combined with agile response to emerging patterns, will position the organization to optimize sales execution and achieve sustained competitive advantage.

Success will require commitment from all organizational levels—from frontline sales representatives implementing best practices to senior leadership providing strategic direction and resource allocation. The dashboard serves not merely as a reporting tool but as a catalyst for continuous improvement and organizational learning.

10. Appendices

Appendix A: DAX Formulas Reference

Complete documentation of all DAX measures used in the dashboard is available in the technical specification document. Key formulas include:

- YTD Actual Sales = CALCULATE([Total Sales Actual], DATESYTD('Calendar'[Date]))
- Variance % = DIVIDE([Variance], [Total Sales Target])
- Months Target Reached = COUNTROWS(FILTER(VALUES('Calendar'[YearMonth]), CALCULATE([Variance]) > 0))

Appendix B: Data Sources and Refresh Schedule

- **Actual Sales Data:** Extracted from CRM system, refreshed daily at 6:00 AM
- **Target Sales Data:** Updated quarterly following strategic planning cycles
- **Calendar Table:** Static dimension updated annually to include new fiscal periods

Appendix C: Glossary of Terms

- **YTD (Year-to-Date):** Cumulative performance from the beginning of the fiscal year to the current date
- **Variance:** The difference between actual performance and target (Actual minus Target)
- **DAX:** Data Analysis Expressions, the formula language used in Power BI
- **KPI:** Key Performance Indicator, a measurable value demonstrating effectiveness in achieving objectives

END OF REPORT

For questions or additional analysis, please contact the Business Intelligence team.