📄 Power BI Case Study PDF

Title: Financial Performance Dashboard
Role: Data Analyst | Power BI Developer
Duration: 4–5 Days
Domain: Finance
Type: Personal Portfolio Project
Tools: Power BI, Power Query, DAX, Excel

🔷 1. Project Summary

A fictional multi-department company needed an analytical tool to monitor its **financial performance** across various departments. The goal was to create an interactive dashboard using Power BI that helps visualize:

- Revenue and cost trends
- Profitability insights
- Monthly and yearly performance changes
- Department-level comparisons

This project simulates a **freelance client request** and is designed as part of a professional Power BI portfolio.

🔷 2. Business Problem

“We want to quickly identify which departments are most profitable, where we’re overspending, and how our revenue and profit are trending over time.”

🔷 3. Objective

Build a dashboard that answers:

- What’s the **total revenue, cost, and profit**?
- Which departments are performing best/worst?
- What’s the **monthly growth trend**?
- How are **profit margins** evolving?
- Can we drill down by **month/year/department**?

🔷 4. Dataset Used

Source: Mock raw financial dataset (CSV)
Columns:

- Date
- Department
- Revenue
- Cost
- Manually created: Month column
- Created supporting tables:
    - `Dim_Department` (manual)
    - `Dim_Date` (DAX-generated)

🔷 5. Data Cleaning (Power Query)

Task	Description
Remove Nulls	Removed rows with missing department/revenue data
Fix Data Types	Ensured dates, text, and numbers were correct
Calculated Profit	`Profit = Revenue - Cost`
Trimmed/Formatted Text	Removed leading/trailing spaces
Removed Duplicates	Ensured clean, unique entries

🔷 6. Data Model (Star Schema)

- **Fact Table**: Financial transactions
- **Dimension Tables**: Department, Date
- One-to-many relationships
- Clean, scalable model used for dynamic filtering

🔷 7. DAX Measures

Measure	Description
Total Revenue	`SUM(Financials[Revenue])`
Total Cost	`SUM(Financials[Cost])`
Total Profit	`Revenue - Cost`
Profit Margin (%)	`(Profit / Revenue) * 100`
MoM Growth %	Revenue Month-over-Month change
YoY Growth %	Revenue Year-over-Year change

These measures power KPI Cards, Line Charts, and Department Comparisons.

🔷 8. Visuals & Features

Visual	Purpose
KPI Cards	Show top-level financial metrics
Line Charts	Show monthly trend over time
Bar Charts	Compare departments
Matrix	Tabular view of all KPIs
Slicers (Date/Department)	Enable interactive filtering

🔷 9. Insights Derived

- Easily spot most and least profitable departments
- Monitor growth or decline over time
- Use slicers to customize view by month or department
- Track progress using MoM & YoY performance

🔷 10. Outcome

✅ Created a professional, clean, fully-interactive dashboard
✅ Demonstrated business storytelling with data
✅ Strengthened Power BI, DAX, and data modeling skills
✅ Ready to showcase to clients as a **freelance sample**

🔷 11. Final Dashboard Preview

📸 Insert 2–3 full-width screenshots here (KPI section, Trend chart, Department comparison)

🔷 12. About Me

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☑ Attachments

- `.pbix` file
- Cleaned `.csv` file
- Screenshots (PNG)
- Case Study PDF (this file)
