

Financial Sales Dashboard Analysis

Executive Summary

Objective:

To provide a comprehensive overview of financial performance, enabling data-driven decision-making through interactive visuals and KPIs. Also to present a detailed summary of revenue, profit, costs, and sales distribution for April 2014, enabling stakeholders to gain insights into product, region, and discount band performance.

Key Features and Insights:

1. Revenue Analysis:

- Total revenue for the period: **\$118.73M**.
- Gross sales: **\$127.93M**, with a profit of **\$16.89M**.
- Average profit margin: **24,133.86** and average sale price: **\$118.43**.

2. Cost Analysis:

- Cost of Goods Sold (COGS): **\$101.83M**.
- Average cost per unit: **\$96.48**.

3. Segment Insights:

- Revenue distribution highlights **Government (53M)**, **Small Business (20M)**, and other segments.
- Significant contributions from the **High Discount Band (31.48%)**.

4. Geographical Insights:

- Major revenue contributors include **North America** and **Europe**.

5. Trend Analysis:

- Revenue trends over time indicate peaks in November 2014 (**12M**) and dips in prior months.

Aggregation Summary

1. Revenue and Profit Highlights:

- a. Total revenue: **\$118.73M**.
- b. Profit: **\$16.89M**.
- c. Total cost: **\$67,534**.

2. Product Analysis:

- a. Product-level breakdown shows trends in **revenue, units sold, discounts, and profits** throughout the year.
- b. Peaks in performance occurred in **October and November**, reflecting higher sales and profits.

3. Regional Performance:

- a. The report highlights gross sales, profit, and units sold across regions such as **United States, Canada, France, Germany, and Mexico**.
- b. The United States leads in overall sales and profit contributions.

4. Revenue and Profit Trends:

- a. Revenue and profit trends show consistent growth, with significant peaks in **Q3 and Q4**.
- b. These trends align with seasonal fluctuations and business cycles.

5. Discount Band Distribution:

- a. Total revenue from discount bands: **\$119M**.
- b. Distribution includes **31.48% (High)**, **32.66% (Medium)**, **29.17% (Low)**, and a small percentage without discounts (**6.69%**).

Discount Summary Report

1. Revenue and Profit Overview:

- Total revenue: **\$118.73M**.
- Total profit: **\$16.89M**.

2. Discount Band Analysis:

- Contribution to revenue by discount bands:
 - **Medium (32.66%):** Revenue **\$38.78M**, Profit **\$5.58M**.
 - **High (31.48%):** Revenue **\$37.37M**, Profit **\$3.39M**.
 - **Low (29.17%):** Revenue **\$34.62M**, Profit **\$6.19M**.
 - **None (6.69%):** Revenue **\$7.94M**, Profit **\$1.73M**.
- The **Low discount band** shows the highest profit contribution, while the **Medium band** generates the highest revenue.

3. Profit Margin Trends:

- Profit margins for each band:
 - **None: 22%.**
 - **Low: 18%.**
 - **Medium: 14%.**
 - **High: 9%.**

4. Top Discount Band and Country:

- The **High discount band** drives significant revenue across all countries.
- **United States of America** ranks as the top-performing country.

5. Visual Analysis:

- Trends in **revenue and profit margin** highlight the relationship between discounts and profitability.
- The dashboard provides comparative insights for evaluating pricing strategies.

Profitability Summary Report

1. Revenue and Profit Overview:

- Total revenue: **\$118.73M**.
- Total profit: **\$16.89M**.

2. Top 5 Products:

- **Paseo** leads with a profit of **\$4.8M**, followed by **VTT (\$3.0M)**, **Amarilla (\$2.8M)**, **Velo (\$2.3M)**, and **Montana (\$2.1M)**.

3. Segment Analysis:

- **The government segment** is the top contributor with **\$11M** in profit.
- Other segments include Small Business (**\$4M**) and Channel Partners (**\$1M**).
- Midmarket and Enterprise segments recorded negative profitability (-\$1M each).

4. Regional Performance:

- **France** leads with the highest contribution to profit at **22.38%**, followed by Canada (**20.89%**), United States (**17.73%**), and Mexico (**17.21%**).
- **Germany** contributes **21.79%** to total profitability.

5. Country and Segment Profitability:

- **Canada (Government Segment, Paseo Product)**: Highest total profit of **\$861,733.45**.
- **France (Government Segment, Amarilla Product)**: Total profit of **\$616,534.00**.
- Other notable performances include products like **Velo and Amarilla** in specific regions.

Product Summary Report

1. Overview Metrics:

- **Revenue:** \$118.73M
- **Gross Sales:** \$127.93M
- **Profit:** \$16.89M
- **Cost of Goods Sold (COGS):** \$101.83M

2. Top and Bottom Performers:

- **Top Product:** Paseo, generating a profit of **\$4.8M**.
- **Bottom Product:** Carretera, with lower profitability metrics.

3. Top 5 Products:

- Paseo (**\$4.8M**), VTT (**\$3.0M**), Amarilla (**\$2.8M**), Velo (**\$2.3M**), and Montana (**\$2.1M**).

4. Discount Band Analysis:

- **Low Discount Band** performed the best, contributing significantly to profits.
- Analysis shows varying performance across **low, medium, high**, and **no discount** categories, highlighting how discounts impact product sales.

5. Segment Trends:

- Segments analyzed include **Government, Channel Partners, Enterprise, Midmarket**, and **Small Business**.
- Government is the largest contributing segment, with steady growth over time.

6. Temporal Analysis:

- Monthly performance trends from **September 2013 to November 2014** show a peak in revenue and profit around November 2014.