

SALES PERFORMANCE ANALYSIS

DESCRIPTION

Background

Mike Goodman, the head of Product Management of a retail products company, is responsible for determining which products his company should continue to offer for sale and which products should be discontinued from the company's product catalog.

Objective

To build a dashboard that will present monthly sales performance by product segment and product category to help client identifying the segments and categories that have met or exceeded their sales targets, as well as those that have not met their sales targets.

Domain: Ecommerce

Dataset Description

We will be using two datasets here i.e. Sample - Superstore and Sales Target.

*** Sample -Superstore which covers Orders data from 2014 - 2017;**

Within this file you will find the following fields:

Field	Description
Row ID	Observation Index
Order ID	Unique Order ID of a product
Order Date	Order Placement Date
Ship Date	Shipment Date of the placed order
Ship mode	Shipment mode of the placed order
Customer ID	Unique Customer ID
Customer Name	Name of the Customer
Segment	Product Segment (i.e.HomeOffice/Corporate/Consumer etc.)
Country	Unique Country Name

City	Unique City Name
State	Unique State Name
Postal Code	Area wise Postal code
Region	Especially the part of a country
Product ID	Unique Id respective to Product
Category	Product category
Sub-Category	Product Subcategory
Product Name	Unique Product Name
Sales	Sales Amount
Quantity	The amount or number of a material
Discount	A deduction from the usual cost of something
Profit	Obtain a financial advantage or benefit

Sales-Target will cover the target data;

Within this file you will find the following fields:

Field	Description
Category	Product category
No. of Records	Unique Record

Order Date

Order Placement Date

Sales Target

Targeted Sales to be achieved

Segment

Product Segment (i.e.HomeOffice/Corporate/Consumer etc.)

Analysis Tasks

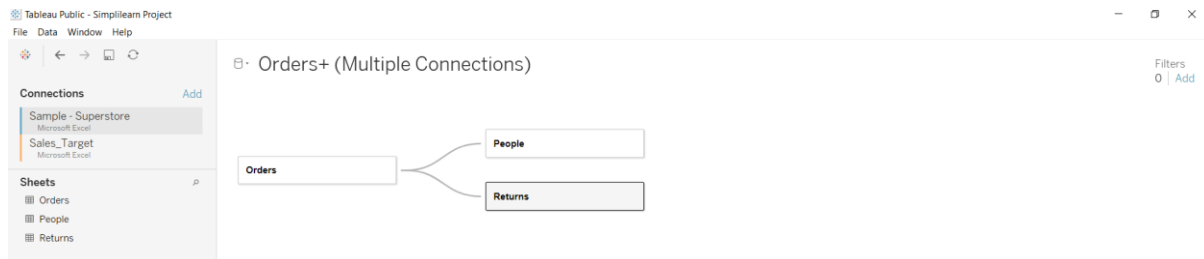
1. Use the Saved Sample – Superstore dataset.
2. Create a bullet chart with Category and Segment dimensions and Sales measures.
3. Blend the data with the Saved Sample - Sales Target data set to bring in the Sales Target measure.
4. Color code the chart to identify Categories and Segments that are above or below target.
5. Add the year of sales to the view to identify trends and outliers.
6. Add a filter so that the user can select one, more than one, or all years.
7. Create a dashboard with this view.

STEPS:

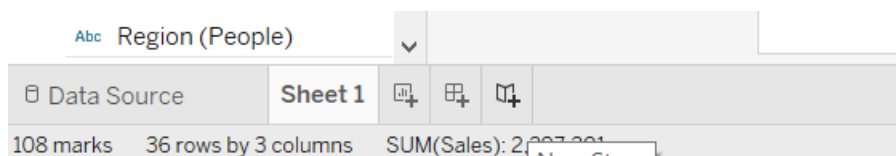
1. Insert both the Data sets – “ Sample SuperStore” and “Sales Target” into Tableau Public, by clicking Add → Microsoft Excel → choose the Dataset and click ok in the Data Source Tab below.

2. Drag Orders from the sheets to the right above blank area.

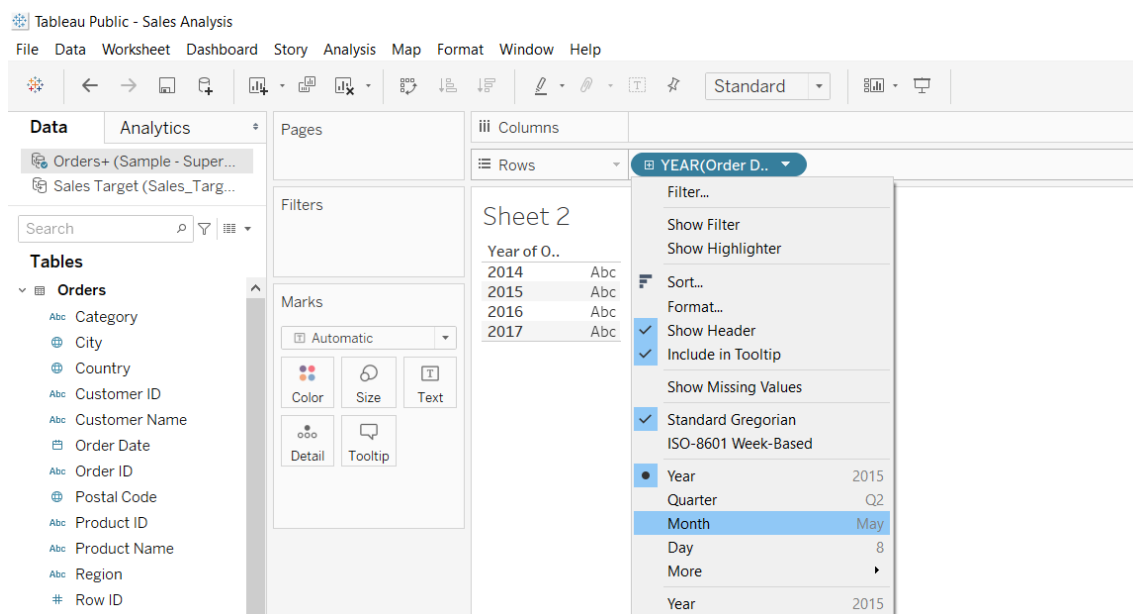
3. Drag returns and people to the same area and create Multiple connections between Orders - returns and orders – people.



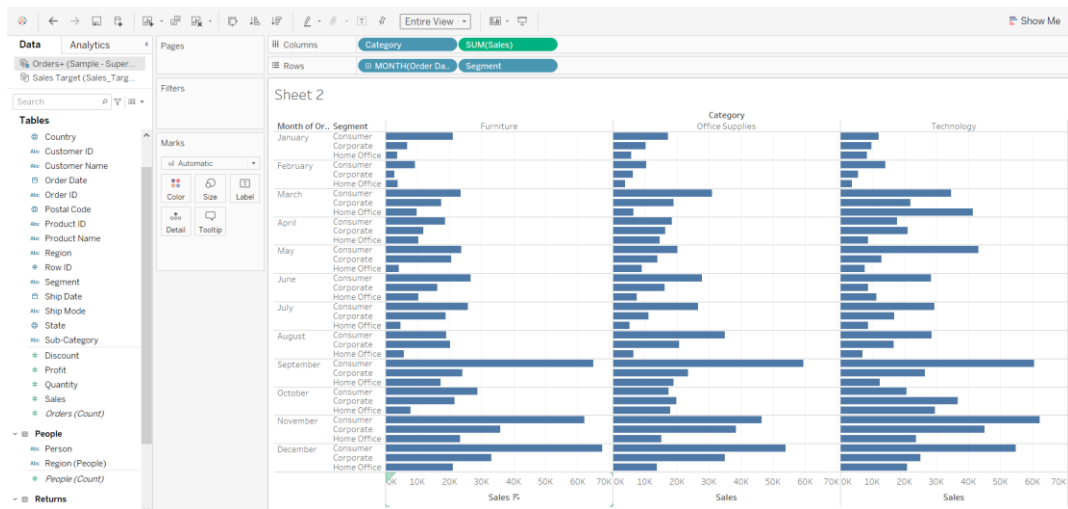
4. Click on the Sheet 1 In the below Tabs.



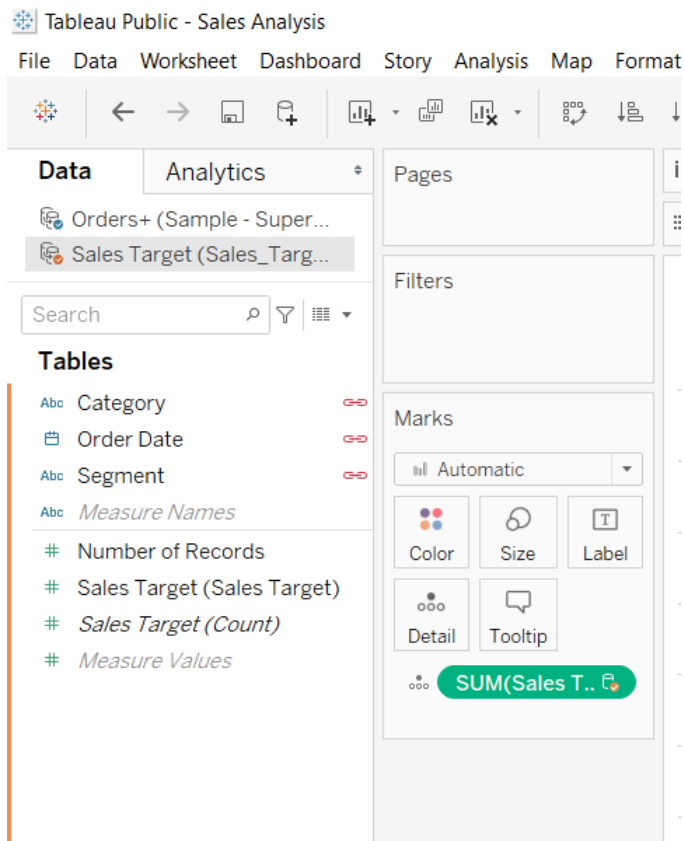
5. Drag the Order Date to the rows and click Month from the drop down.



6. Drag Segment to the Rows and sales , category to the columns.



7. Click on Sales Target Dataset and drag the Sales Target(Sales Target) column in detail

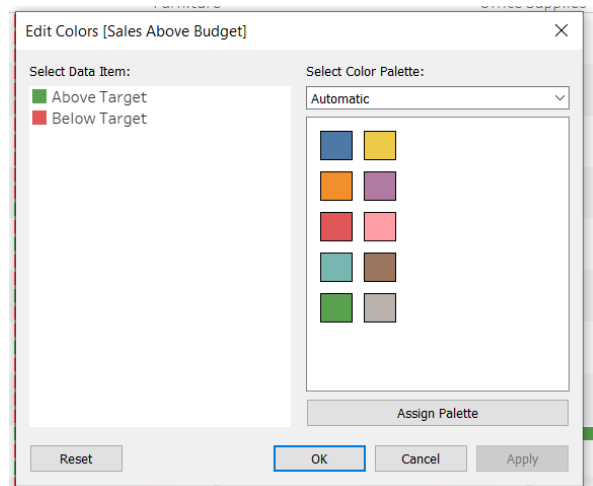


8. Click on Analysis from Menu and click on create Calculated field. Rename it as 'Sales above Budget'

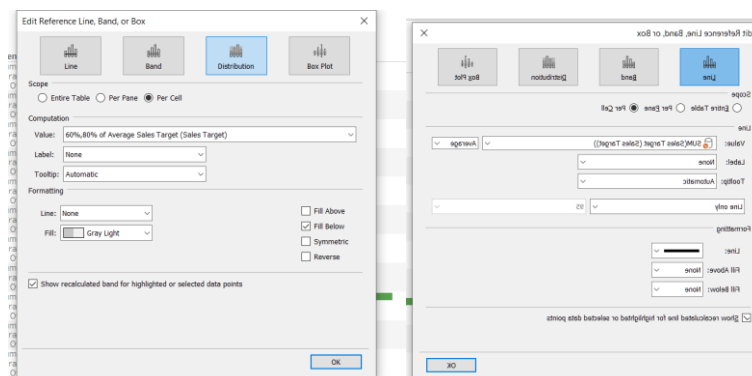
- And Type : IF ELSE Statement:



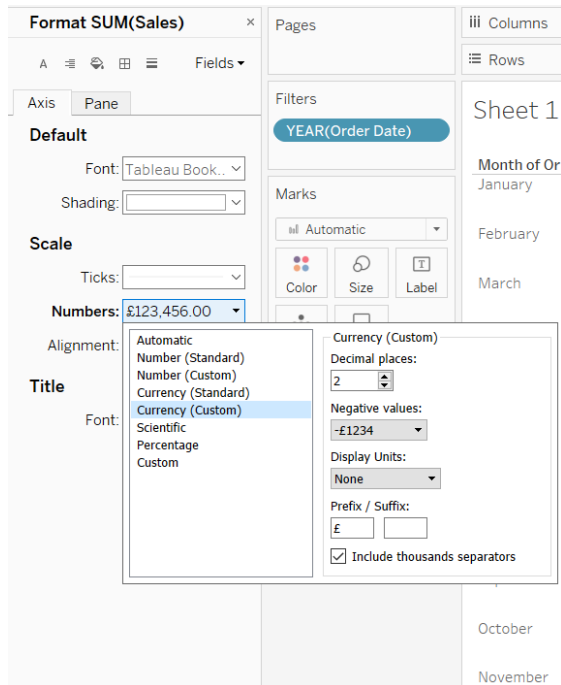
- Drop the calculated field into the Colour and edit Green for 'Above Target' and red for 'Below Target'



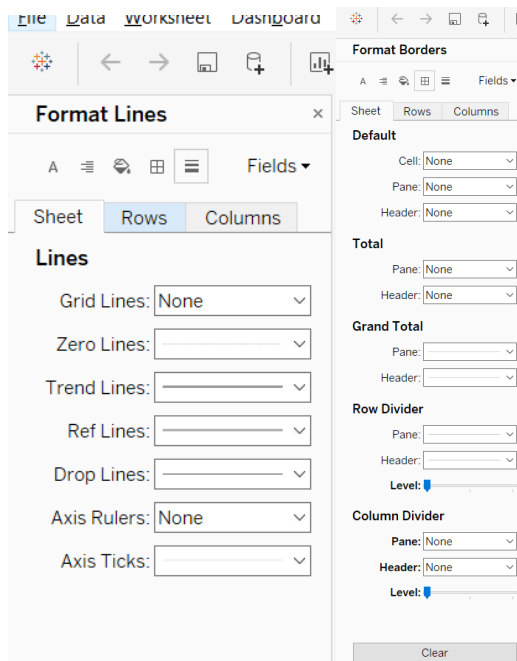
- Add reference lines to edit for the distribution and line.



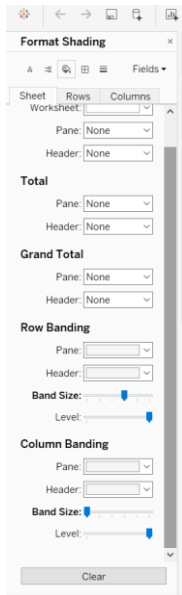
- Change the X axis to the currency. Right click and click on format. And click on the currency.



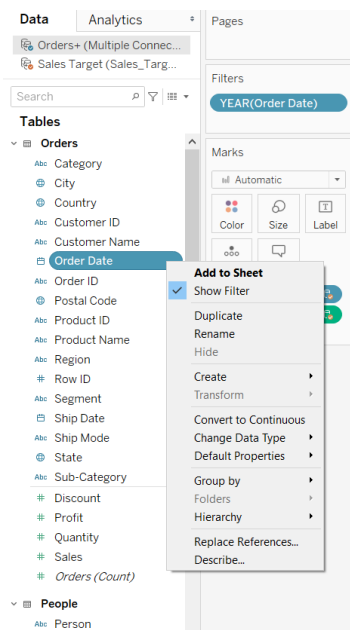
- Now Right click on the Axis and edit on format.- Click on format lines and format Borders and select as below snippet.



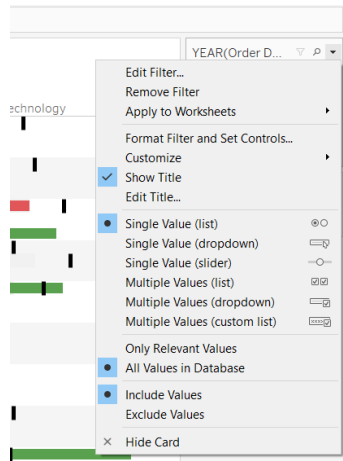
- Now Right click on the Axis and edit on format.- Click on format shading- select as row banding and select band size as the below snippet.



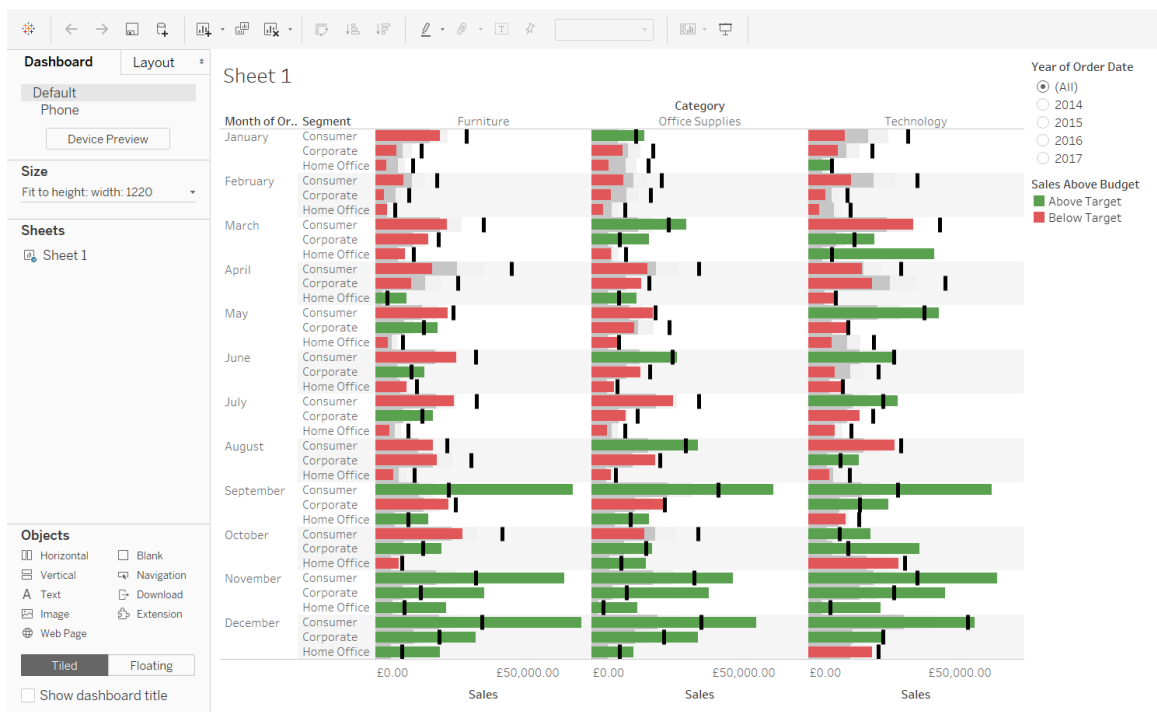
- Click on the order date and select 'show filter' from the drop down.



- Right click on the drop down and click on single value(list).



- Click on the dashboard and drop the sheet1 on the dashboard .



OUTPUT:

