Tableau User Story | Sales Performance

Introduction:

This user story outlines the specifications for building two dashboards using tableau to help stakeholders, including sales managers and executives to analyse sales performance and customers.

Sales Dashboard | Requirements:

➢ Dashboard Purpose

- o The purpose of sales dashboard is to present an overview of the sales metrics and trends in order to analyse year-over-year sales performance and understand sales trends.

➢ Key Requirements

- o *KPI Overview*
  - ▪ Display a summary of total sales, profits and quantity for the current year and the previous year.

- o *Sales Trends*
  - ▪ Present the data for each KPI on a monthly basis for both the current year and the previous year.
  - ▪ Identify months with highest and lowest sales and make them easy to recognize.

- o *Product Subcategory Comparison*
  - ▪ Compare sales performance by different product subcategories for the current year and the previous year.
  - ▪ Include a comparison of sales with profit.

- o *Weekly Trends for Sales & Profit*
  - ▪ Present weekly sales and profit data for the current year.
  - ▪ Display the average weekly values.
  - ▪ Highlight weeks that are above and below the average to draw attention to sales & profit performance.

Customer Dashboard | Requirements:

➢ Dashboard Purpose

- o The customer dashboard aims to provide an overview of customer data, trends and behaviours. It will help marketing teams and management to understand customer segments and improve customer satisfaction.

➢ Key Requirements

- o *KPI Overview*
    - ▪ Display a summary of total number of customers, total sales per customer and total number of orders for the current year and the previous year.

- o *Customer Trends*
    - ▪ Present the data for each KPI on a monthly basis for both the current year and the previous year.
    - ▪ Identify months with highest and lowest sales and make them easy to recognize.

- o *Customer Distribution by Number of Orders*
    - ▪ Represent the distribution of customers based on the number of orders they have placed to provide insights into customer behaviour, loyalty and engagement

- o *Top 10 Customers By Profit*
    - ▪ Present the top 10 customers who have generated the highest profits for the company.
    - ▪ Show additional information like rank, number of orders, current sales, current profit and the last order date.

Design & Interactivity Requirements

➢ Dashboard Dynamic

- o The Dashboard should allow users to check historical data by offering them the flexibility to select any desired year.
- o Provide users with the ability to navigate between the dashboards easily.
- o Make the charts and graphs interactive, enabling users to filter data using the charts.

➢ Data Filters

- o Allow users to filter data by product information like category and subcategory and by location information like region, state and city.