**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**

### 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**

#### **KPI Overview**

* + - Display a summary of total sales, profits and quantity for the current year and the previous year.

#### **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.

#### **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.

#### **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**

### 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**

#### **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.

#### **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.

#### **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

#### **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**

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

#### **Data Filters**

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