

# Company Performance Summary

## Introduction

Every company, regardless of its size, always thinks about creating and delivering the best products and services. That is a laudable position, but especially in today's world, it is unacceptable not to have data analysis as a routine. It is not enough to just develop optimal products or services and even focus only on attracting new customers.

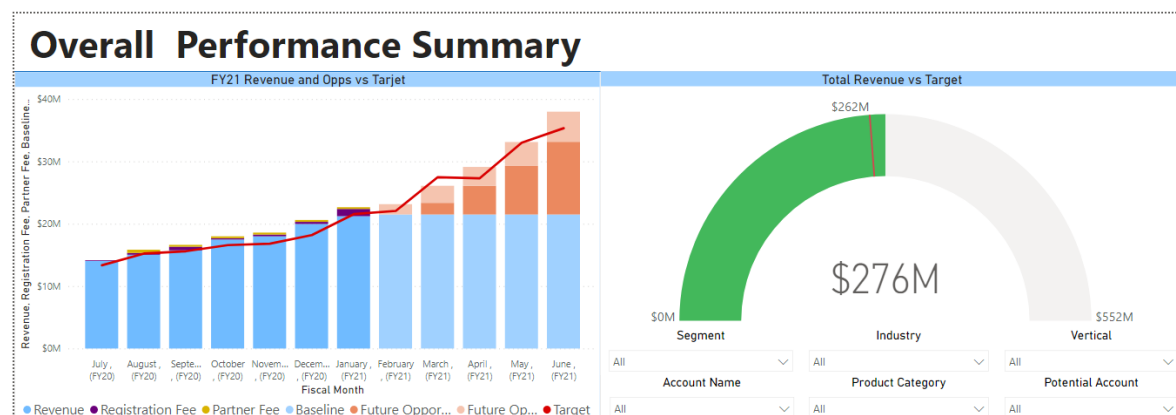
Nowadays data analytics can help organizations to get insights easily in order to make data-driven decisions. Data visualization tools have become a must since they help to get an easier understanding of the on-going situation of the company helping to improve the efficiency.

## Objective

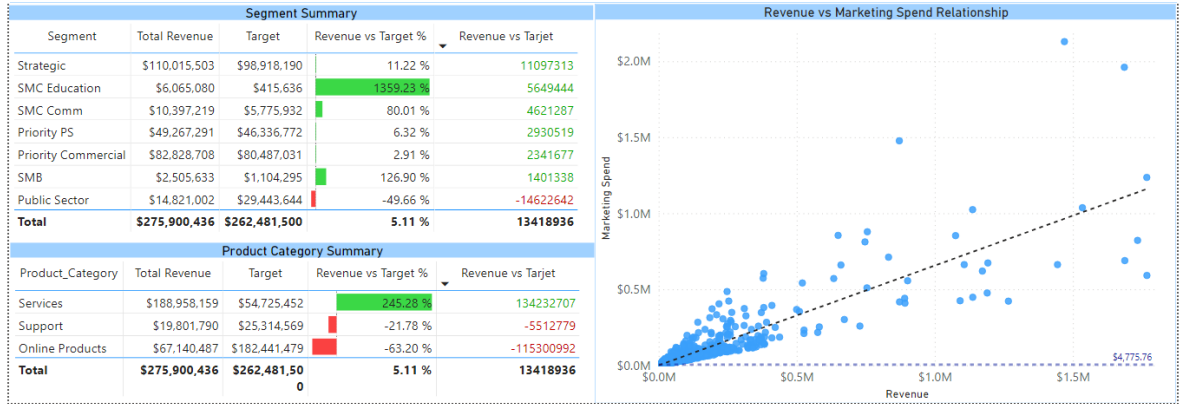
Our goal is to turn a csv file (raw data) into a fully automated Power BI dashboard where we can slice and dice the data in any way we want to readjust the data and look for specific insights among this organization. It has to include a summary of the transactional fields by fiscal month and highlight the revenue vs target Budget. Also the breakdown of segments and products and highlight which ones are missing the target and which are hitting the target by the end of the year. Additionally, we want to investigate the relationship between revenue and marketing spent to see if there is any correlation.

The raw data used to make this dashboard is synthetic, created randomly with Python. However, it is data type that any organization has, some of the columns we can find in this data set are: Revenue, Account, Fiscal month, Product, Transactional fields, Marketing Budget, etc.

## Dashboard



Main Summary Table													
	July , (FY20)	August , (FY20)	September , (FY20)	October , (FY20)	November , (FY20)	December , (FY20)	January , (FY21)	February , (FY21)	March , (FY21)	April , (FY21)	May , (FY21)	June , (FY21)	Total
Revenue	\$14,034,785.00	\$15,037,469.00	\$15,748,219.00	\$17,479,367.00	\$17,995,751.00	\$19,973,825.00	\$21,221,564.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$121,490,980.00
Registration Fee	\$109,738	\$285,794	\$579,861	\$208,683	\$278,024	\$336,205	\$1,162,265	\$0	\$0	\$0	\$0	\$0	\$2,960,570
Partner Fee	\$0	\$521,222	\$291,586	\$299,819	\$314,051	\$303,351	\$273,764	\$0	\$0	\$0	\$0	\$0	\$2,003,793
Baseline	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$21,495,328	\$21,495,328	\$21,495,328	\$21,495,328	\$21,495,328	\$107,476,640
Future Opportunities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,649,398	\$2,730,814	\$3,029,470	\$3,838,098	\$4,830,062	\$16,077,842
Future Opportunities Into RR	0	0	0	0	0	0	0	0	1866048	4593842	7776809	11653912	25890611
Total Revenue	\$14,144,523	\$15,844,485	\$16,619,666	\$17,987,869	\$18,587,826	\$20,613,381	\$22,657,593	\$23,144,726	\$26,092,190	\$29,118,640	\$33,110,235	\$37,979,302	\$275,900,436
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Total Revenue	\$14,144,523	\$15,844,485	\$16,619,666	\$17,987,869	\$18,587,826	\$20,613,381	\$22,657,593	\$23,144,726	\$26,092,190	\$29,118,640	\$33,110,235	\$37,979,302	\$275,900,436
Target	\$13,352,460	\$15,228,123	\$15,597,340	\$16,585,143	\$16,801,377	\$18,190,999	\$21,551,710	\$22,062,698	\$27,474,163	\$27,296,085	\$33,014,324	\$35,327,077	\$262,481,500
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Revenue vs Target	792063	616362	1022326	1402726	1786449	2422382	1105883	1082028	-1381973	1822555	95911	2652225	13418936
Revenue vs Target %	5.93 %	4.05 %	6.55 %	8.46 %	10.83 %	13.32 %	5.13 %	4.90 %	-5.03 %	6.68 %	0.29 %	7.51 %	5.11 %



# Conclusion

Today, It is necessary to have a critical vision and, through data analysis, extract the maximum amount of information to be useful in business decision making. Thanks to data analysis, companies can access the specific information they need to facilitate their decision making and business strategies based on rigorous criteria. However, data analysis is not only used to facilitate segmentation work.