

Project Brief (Excel Data Analysis Project)

Project Title

Superstore Sales Performance Analysis Using Microsoft Excel

Background

We are a retail-based company operating superstores across multiple regions in the United States. We require a clear and structured overview of our sales, profit, returns, and regional performance in order to support better business decision-making.

For this purpose, we have provided our raw sales data (Orders, Returns, and People sheets). We expect the data to be analyzed in Microsoft Excel to generate meaningful insights and performance evaluation.

Project Objectives (Requirements)

We expect the following from this project:

Data Cleaning & Preparation

- The dataset should be properly cleaned and prepared for analysis.
- Date formats, numerical values, and categorical fields should be standardized.
- Any duplicate records or missing values should be identified and handled appropriately.

Sales & Profit Analysis

- Total Sales and Total Profit should be calculated.
- Performance should be analyzed category-wise and sub-category-wise.
- Top-performing and lowest-performing products should be identified.

Regional Performance Analysis

- Sales and profit should be compared across different regions.
- The highest-performing and lowest-performing regions should be clearly identified.

Customer Segment Analysis

- Consumer, Corporate, and Home Office segments should be compared.
- It should be clearly shown which segment contributes the most to overall sales and profit.

Returns Impact Analysis

- Returned orders should be linked with the main Orders dataset.
- The financial impact of returns should be analyzed.
- A comparison between returned and nonReturned orders should be presented.

People / Region Responsibility

- Each region's performance should be mapped to its assigned responsible person.
- A region-wise accountability overview should be provided.

KPIs & Metrics

- Key Performance Indicators (KPIs) should be defined and calculated, including:
 - Total Sales
 - Total Profit
 - Profit Margin
 - Return Rate

Pivot Tables & Analysis

- Pivot Tables should be used to create summarized analysis.

- Filters and slicers should be applied to enable interactive data exploration.

Dashboard Creation

- A clean and professional Excel dashboard should be developed.
- The dashboard should include charts, KPIs, and slicers.
- The layout should be designed in a way that management can easily understand the insights.

Insights & Business Recommendations

- The project should include written insights, not just charts.
- Clear recommendations should be provided to indicate where business performance can be improved.

Final Deliverables (Expectations)

- One Excel workbook (cleaned and analyzed data)
- Pivot Tables and Pivot Charts
- One-page interactive dashboard
- A short written summary of findings

Note:

"We are not just looking for charts, but clear insights that help us understand our business performance and make better decisions."