

Discount policy research. Exploratory analysis.

WHO?

- Stakeholders
- no doubts it's going to be Sylvia, VP of Sales and she will be the one who will represent my report and give all additional explanations. From here portfolio most important point is: "Sylvia needs to turn the many findings by the retail analysts into a sales strategy she can sell to the executive team."
- Audience
definitely it will be board member (around 15 persons) in a large meeting room. And Terrence (Super Store board member) is the focal point and mainly that person to whom all information will be addressed. From his portfolio: "He is interested in learning if discounted sales are resulting in more or less profitable sales, and how much the company is profiting or losing based on discounted sales."
- Subject-Matter Experts
there are must be around 15 persons in the meeting, so 100% big bosses will bring some experts familiar with data and this problem

WHAT?

- Data Sources
it's going to be file "Superstore-for-Tableau.xls" and it seems everything is there: sales, discounts, profit (negative and positive), categories, sub-categories, products and all customers – everything is there and it must be enough for my investigation.
- Data Quality
for a this moment I see no problem with data: no missing values, dates are dates, continues data are continues, discrete are discrete, categorical are categorical. Running through the exploratory analysis maybe I will find something like outliers, but for now everything seems fine
- Data Timeliness
the latest date from the file is 12/31/2014. I can't say that the data is fresh, it looks like historical data more than actual.

WHY?

I have here minimum three objectives:

Objectives:

- to find relations between sales discounts and the company's profit
- investigate the level of discounts per individual customers, product categories and more
- find more possible reasons of high discounts

And in addition to satisfy Silvia and Terrence my report has to show some ideas or patterns how to increase the company's profit. It's all about the money, yeah?

In the end there must be some small conclusion with highlighted bullet points or advises. Let the big bosses make their decisions.

HOW?

It's going to be short 5-7 minutes report using a big screen, so interactivity will be in use.

Large room, so people must see everything perfectly well from the farthest corners of the room.

As simple as possible in handling while interacting

Some printed main points are welcomed