Tableau User Story | Sales and Customer Visualization

1. Introduction

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

2. Sales Dashboard | Requirements

2.1 Dashboard Purpose

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

2.2 Key Requirements

2.2.1 KPI Overview --> bans

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

2.2.2 Sales Trends --> sparkline

 – 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.

2.2.3 Product Subcategory Comparison --> bar in bar

 – Compare sales performance by different product subcategories for the current year and the previous year.

 – Include a comparison of sales with profit.

2.2.4 Weekly Trends for Sales & Profit --> line charts

 – 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.

3. Customer Dashboard | Requirements

3.1 Dashboard Purpose

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

3.2 Key Requirements

3.2.1 KPI Overview --> bans

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**.

3.2.2 Customer Trends --> sparkline

 – 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.

3.2.3 Customer Distribution by Number of Orders --> Histogram

Represent the distribution of customers based on the number of orders they have placed to provide insights into customer behavior, loyalty and engagement.

3.2.4 Top 10 Customers By Profit --> Table

 – 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.

4. Design & Interactivity Requirements

4.1 Dashboard Dynamic

 – The Dashboard should allow users to check historical data by offering them the flexibility to select any desired year. --> use parameters

– Provide users with the ability to navigate between the dashboards easily. --> use buttons

– Make the charts and graphs interactive, enabling users to filter data using the charts. --> use dashboard filters for action

4.2 Data Filters

Allow users to filter data by product information like **category and subcategory** and by **location information like region, state and city**. --> use quick filters