**Business Case**

**Business Case**  
**Prepared for:** Coffee Company Executive Team  
**Prepared by:** Kuhle James  
**Date:** 01 October 2025

**Executive Summary**

The coffee company currently manages large volumes of customer and sales data, but decision-making is hindered by static spreadsheets and lack of visual insights. This project introduces an interactive Excel Dashboard that tracks sales performance across customers, products, sizes, roast types, and geographies. The dashboard enables management to monitor key metrics, identify trends, and uncover opportunities for revenue growth and customer retention.

**Business Problem**

The company lacks a centralized, user-friendly tool to monitor sales performance. Current challenges include:

* No visibility into sales trends over time.
* Difficulty comparing sales by geography, coffee type, and roast.
* Limited understanding of customer loyalty program effectiveness.
* Inability to easily identify top-performing customers or high-demand product categories.

This prevents proactive business strategies and makes it harder to optimize marketing and product decisions.

**Project Objectives**

The primary objectives of this project are to:

* Develop a dynamic sales dashboard in Excel that consolidates customer, order, and product data.
* Provide visibility into sales performance by time, geography, customer, coffee type, roast, and size.
* Measure the effectiveness of the loyalty card program.
* Identify high-value customers and product segments for growth.
* Support data-driven decision-making across sales and marketing functions.

**Key Metrics & KPIs**

The dashboard focuses on the following KPIs:

* **Sales Over Time** – Total sales by month/quarter/year
* **Sales by Geography** – Revenue contribution by country
* **Top Customers** – Sales ranking of top 5 customers
* **Roast Type Performance** – Revenue share by roast type
* **Size Preference** – Revenue contribution by product size
* **Loyalty Program Impact** – Average spend and sales share from loyalty card holders
* **Coffee Type Demand** – Sales distribution by coffee type
* **Customer Retention Potential** – Repeat purchases among top customers