



Harnessing Data for Strategic Financial Insights Project



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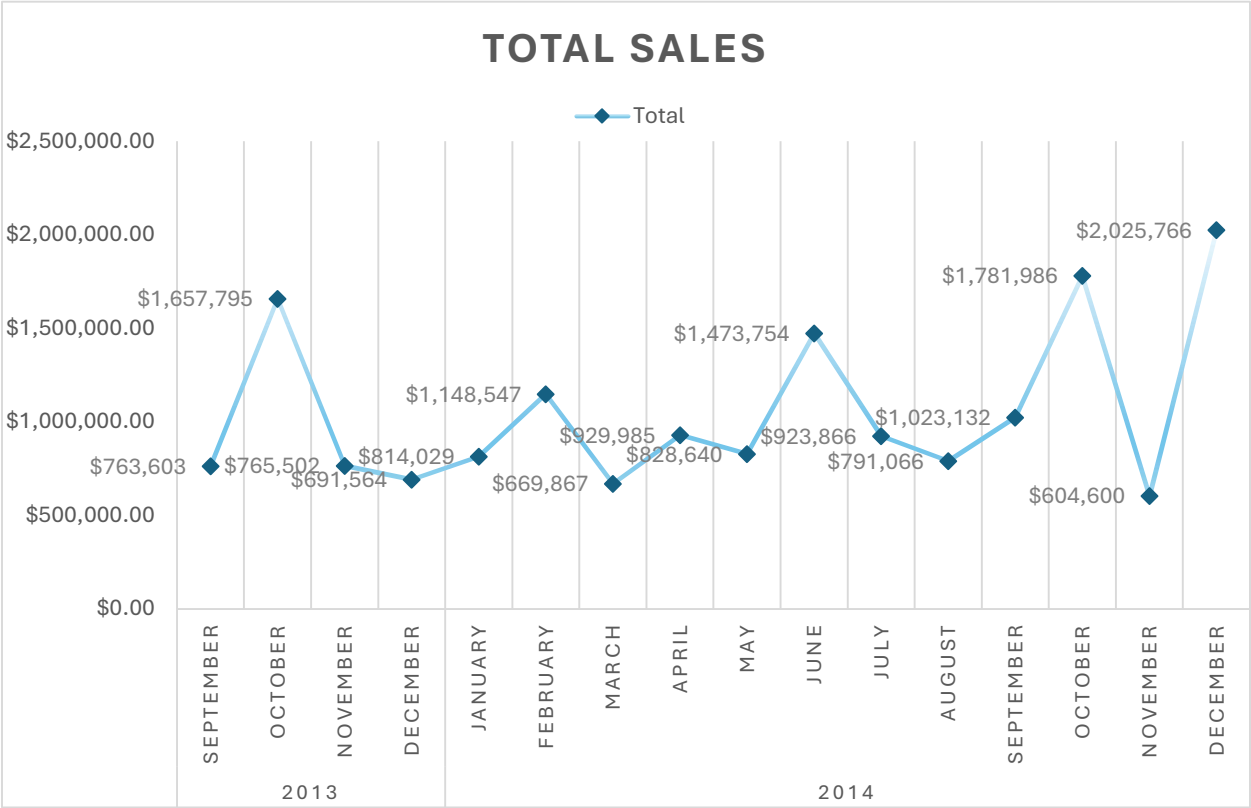
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Harnessing Data for Strategic Financial Insights Project

Return On Investment

Profit Performance Analysis:

- **Overall:** Profit performance was positive throughout 2013 and 2014.
- **Seasonal Trends:** October 2013 and December 2014 exhibited the highest profitability within the analyzed period. Conversely, November, March and August 2014 saw the lowest profits.
- **[Actionable Note]** November, March 2014 may benefit from targeted marketing strategies to boost sales

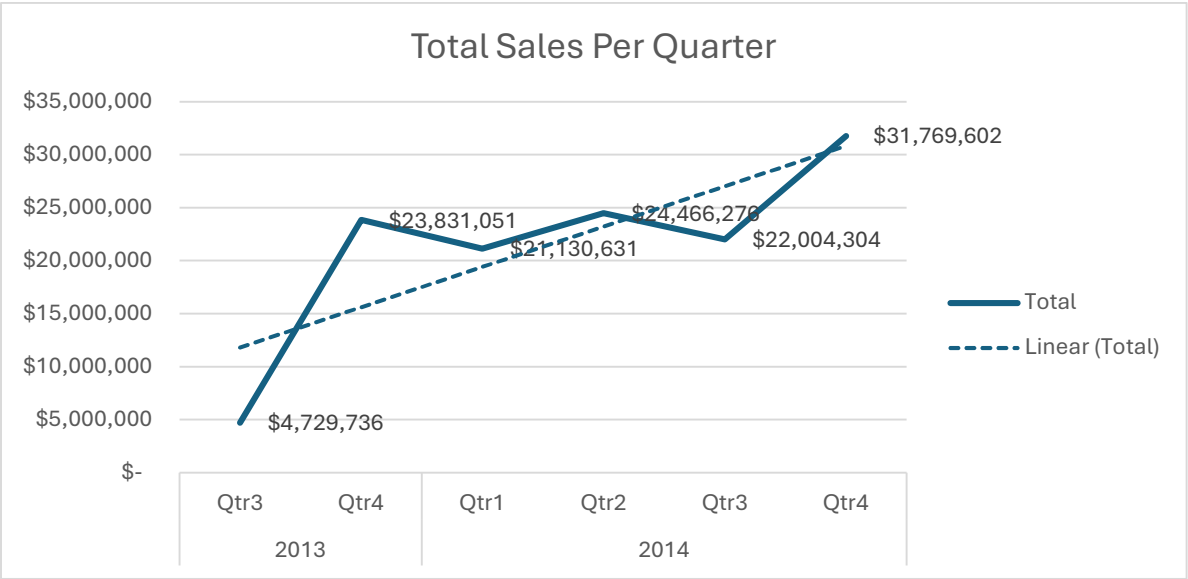


Sales Performance Analysis:

Positive Sales Growth Trajectory

Sales performance has exhibited a steady upward trend, demonstrating a positive trajectory for the company. Notably, Q4 2024 achieved the highest sales figure of \$31,769,602 within the analyzed period.

This encouraging trend suggests continued sales growth in the future.



Sales Performance by Quarter (2013-2014)

Highlights:

Q3 2013: Sales experienced a positive trend, indicating a promising start.

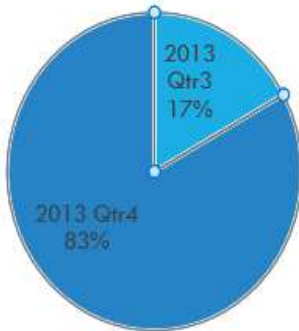
Q4 2013: Sales maintained a strong performance.

Q4 2014: Sales showed renewed strength, suggesting a potential recovery.

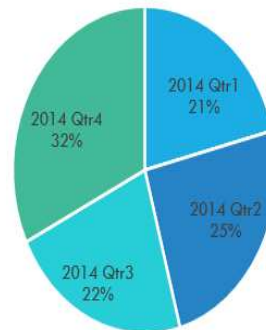
Area for Improvement:

Q3 2014: A decline in sales was observed compared to the previous quarter. Further investigation is recommended to understand the contributing factors and identify corrective actions.

Sales in 2013



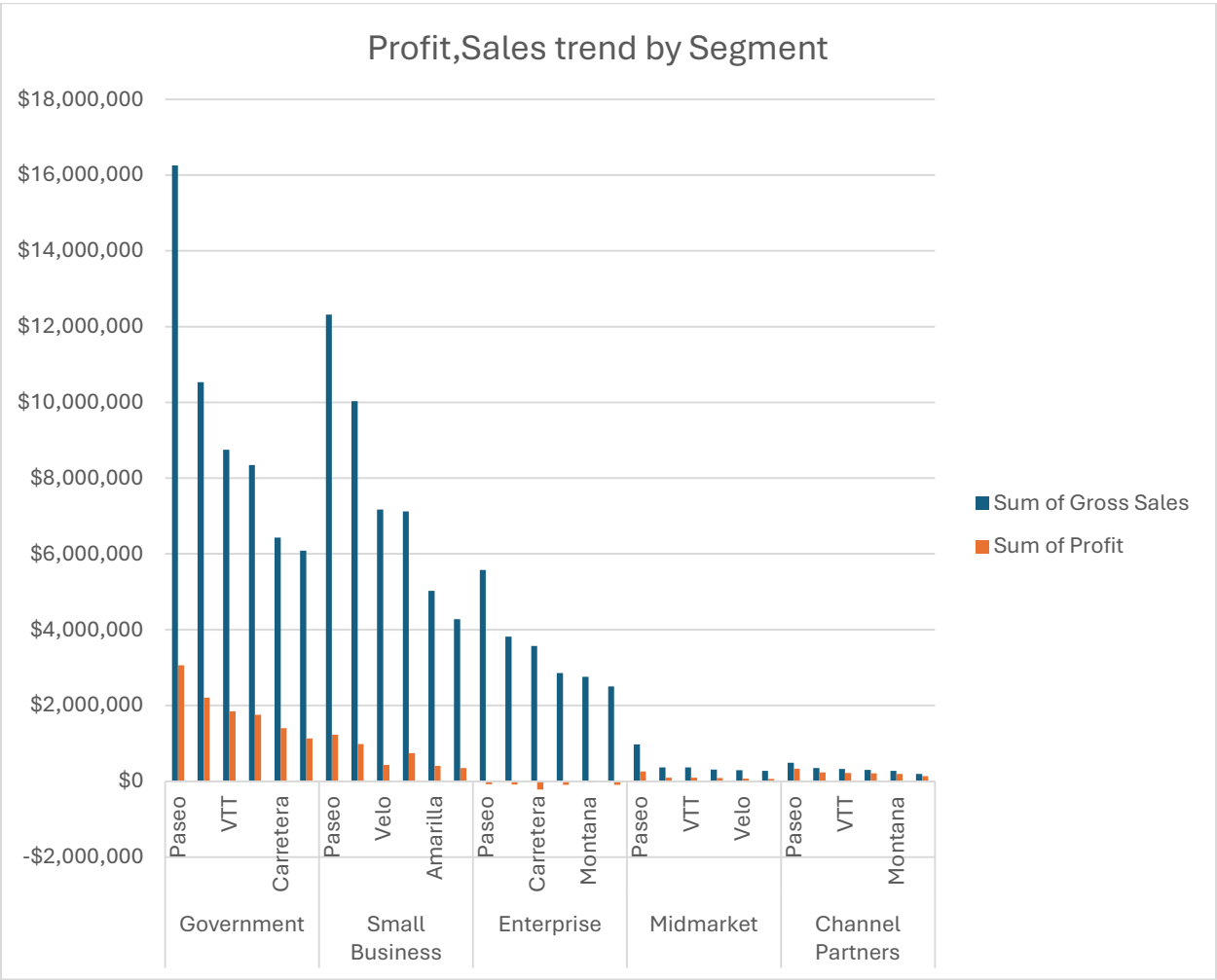
Sales in 2014



Sales and Profit per Segment analysis - Year 2013 and 2014:

Government segment having the most sales followed by the Small Business and **Channel partners** segment having the lowest sales.

Government segment showing most profit, followed by Small Business segment and **Enterprise segment** showing **loss**.



Product analysis - Year 2013 and 2014:

Sales:

Paseo has the highest gross sales followed by VTT. **Carretera** has least Sales.

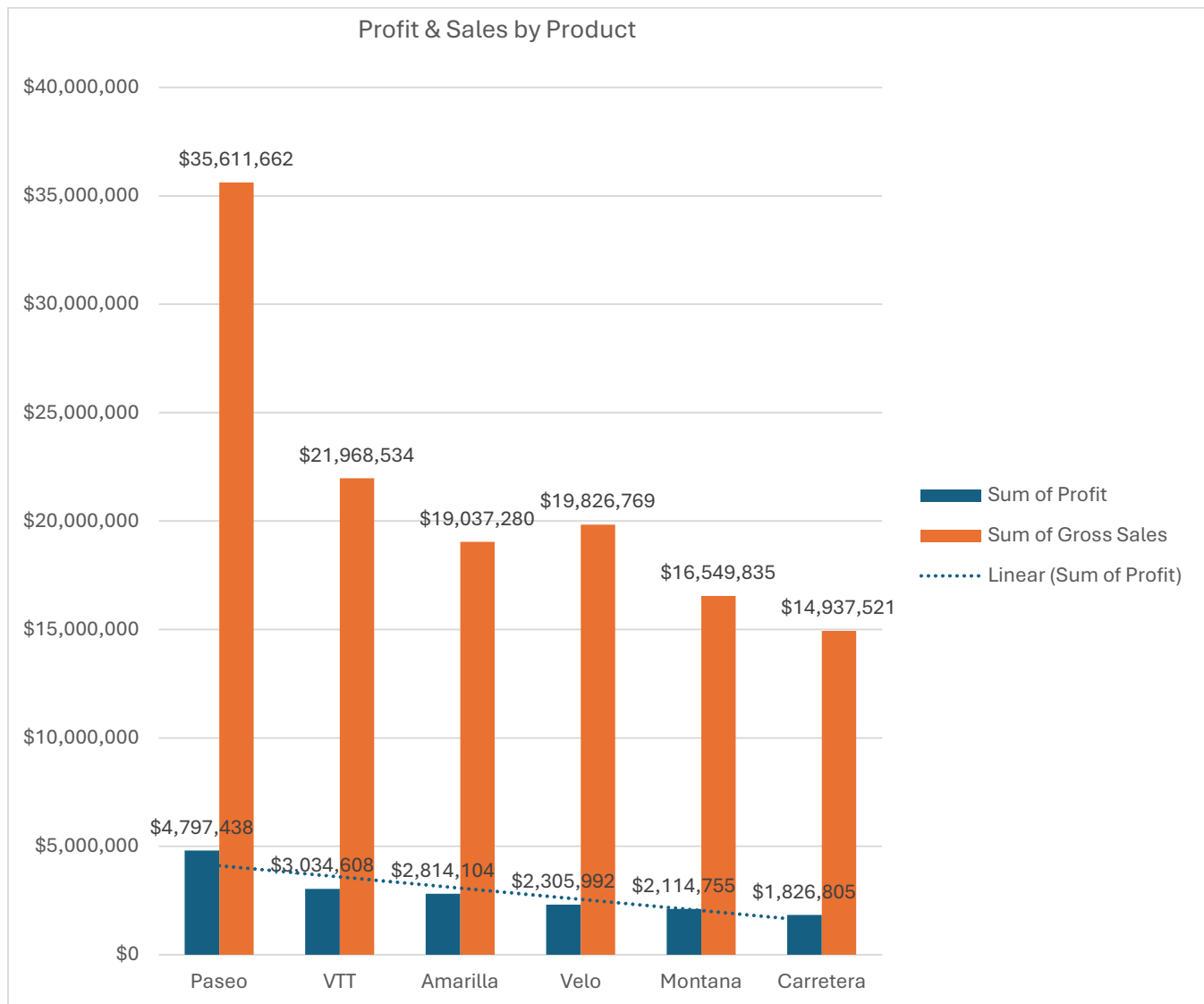
In 2013: Velo is having highest gross sales followed by Paseo. Carretera has least Sales.

In 2014: **Paseo** has the highest sales, but Velo got the second least Sales. Velo needs more investigation. **Montana** has got least Sales.

Profits:

In 2013: **Paseo** has highest profits and **Carretera** has the lowest profits

In 2014: **Paseo** has the highest profits and **Montana** has the lowest profits.



Sales (Amount) by Discount Band- 2013 and 2014:

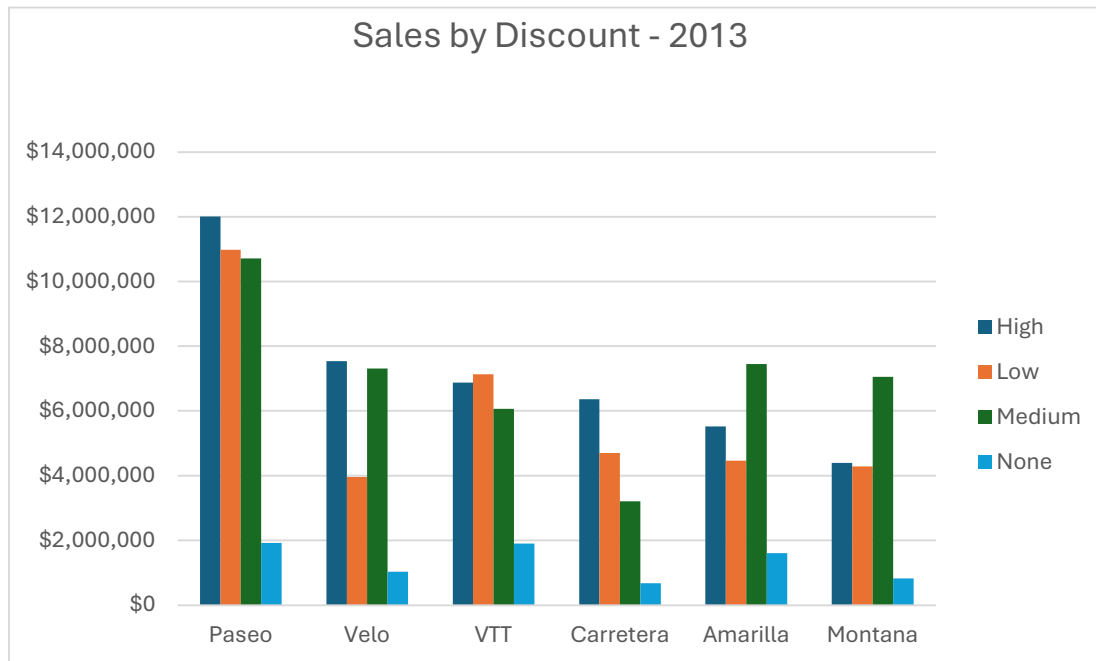
Overall Sales Performance

- **Paseo** demonstrates the highest gross sales when sold with a "High" discount, followed sequentially by "Medium," "Low," and "None" discount bands.
- **Amarilla and Montana** exhibit a sales pattern where "Medium" discount sales surpass those with a "High" discount.
- Sales generated from products without a discount ("None") consistently lag other discount bands across all products.
- **VTT** displays a sales trend where "Low" discount sales outpace those with a "High" discount.

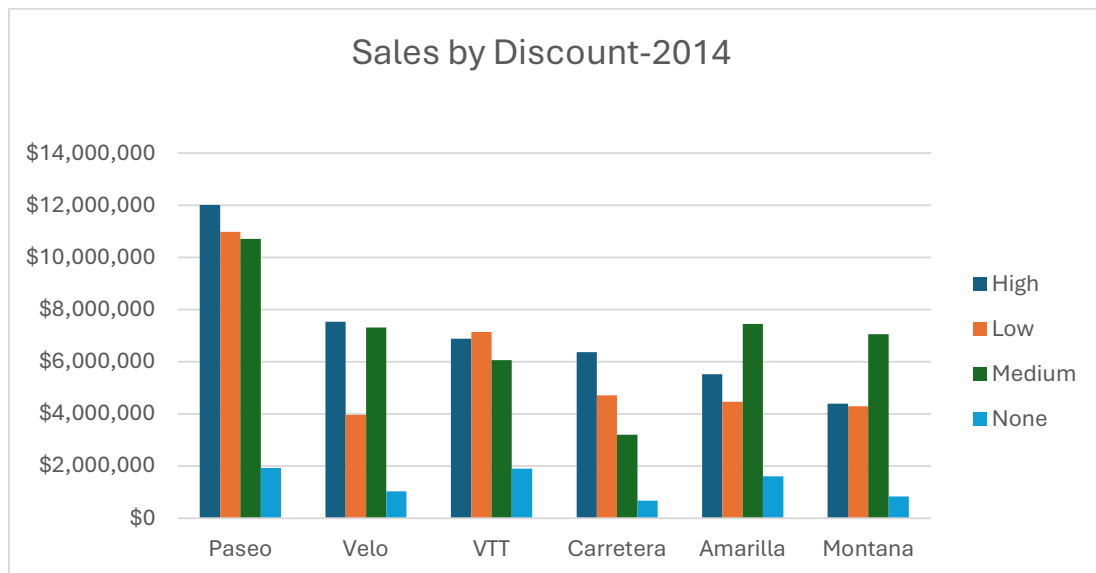
These findings suggest that discount strategies vary in effectiveness across different product lines.



In 2013, “**High**” discount band sales really worked for Velo, VTT, Carretera. Paseo also improved in Sales though “**Medium**” band sales are more.



In 2014, its very clear “**Low**” or “**Medium**” discount sales are more than “**High**” discount band.



Sales by Discount Band

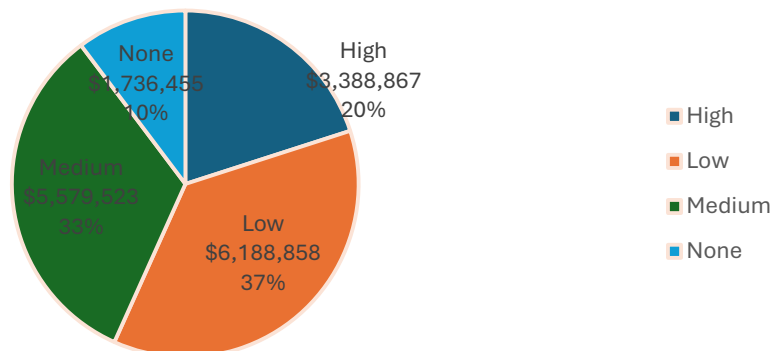
Profit By Discount Band:

This report analyzes the profitability associated with different discount bands.

Key Findings:

- **Low Discount:** Products sold with a "Low" discount band remain the most profitable at 37%. This suggests that offering a slight discount can be a successful strategy for driving sales while maintaining a healthy profit margin.
- **Medium Discount:** "Medium" discount products achieve a solid 33% profit margin. This indicates that moderate discounts can be a viable strategy for balancing sales volume and profitability.
- **High Discount:** While "High" discounts likely contribute significantly to sales (as seen in previous reports), their profit margin is lower at 20%. This suggests that deeply discounted products require careful evaluation to ensure they remain profitable.
- **No Discount:** Products sold at full price ("None") have the lowest profit margin at 10%. This could be due to several factors, such as higher production costs, a more competitive market for these products.

Total Profit By Discount Band



Units sold by Discount Band-2013 and 2014:

This report analyzes the distribution of units sold across different discount bands.

Key Findings:

Discounted Key Findings:

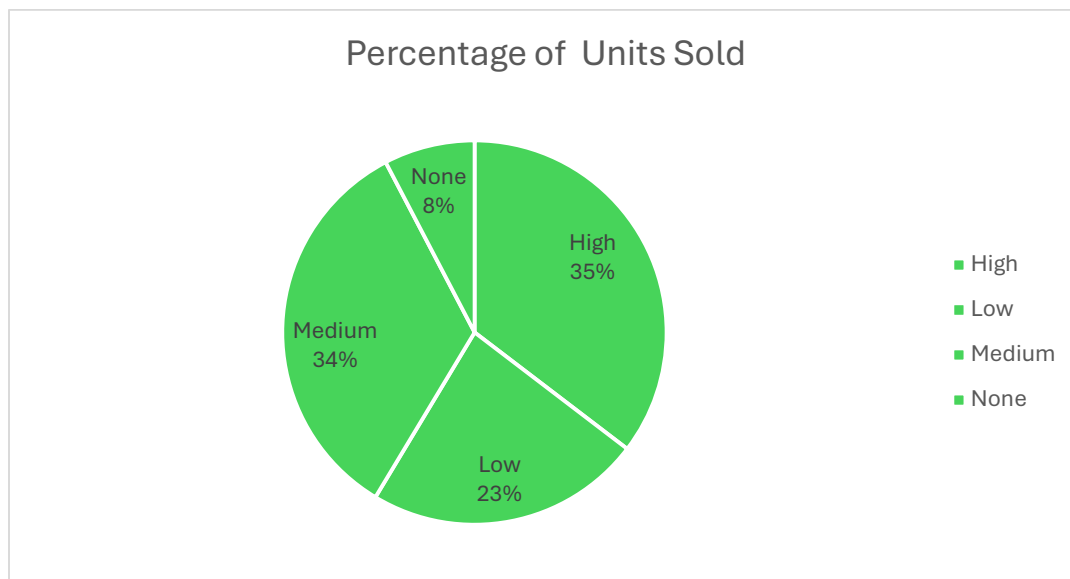
Products: A significant portion of units sold (69%) falls under discounted categories. This suggests that discounts can be an effective strategy for driving sales volume.

High Discount: Products with a "High" discount band contribute the most at 35%.

Medium Discount: "Medium" discounts account for 34% of units sold.

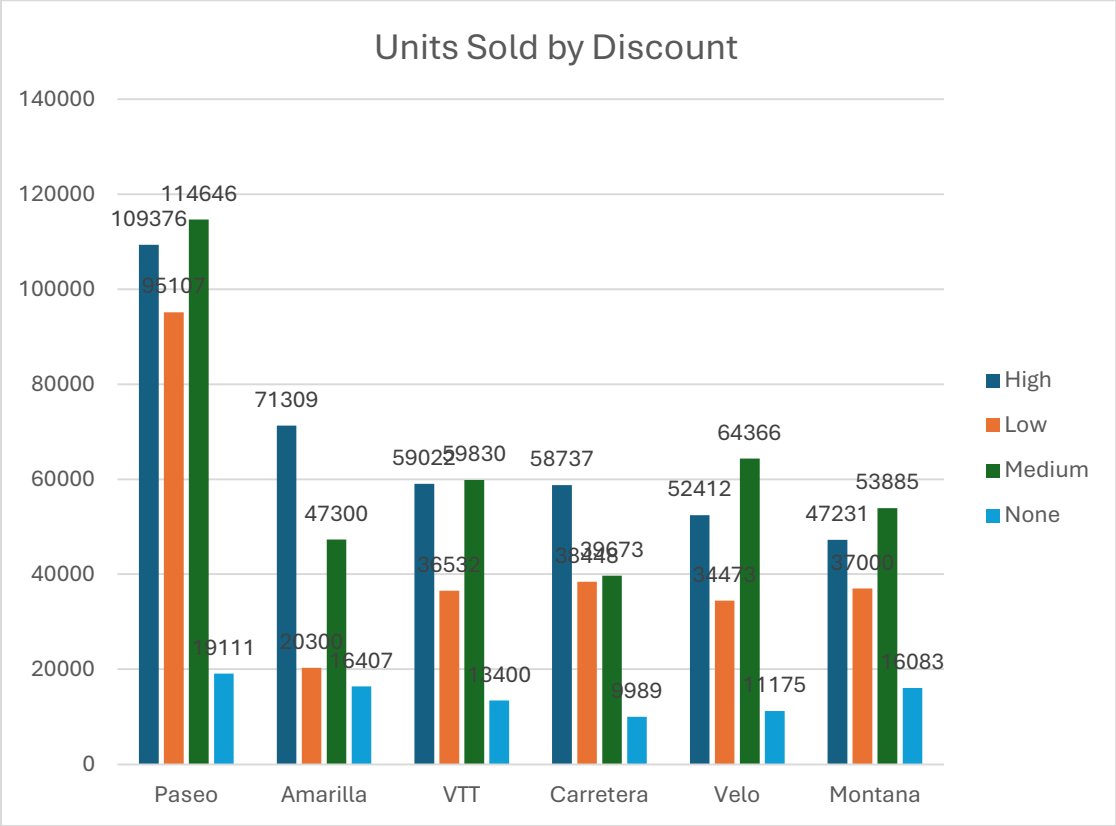
Full Price Sales: "None" discount products, representing full-price sales, make up a smaller portion at 8%. This could indicate that customers are price-sensitive or that full-priced products have a strong value proposition.

Low Discount: "Low" discounts contribute the least to unit sales at 23%. This might suggest that offering a very small discount may not be as effective as a more significant price reduction.



Units Sold Per Product by Discount Band:

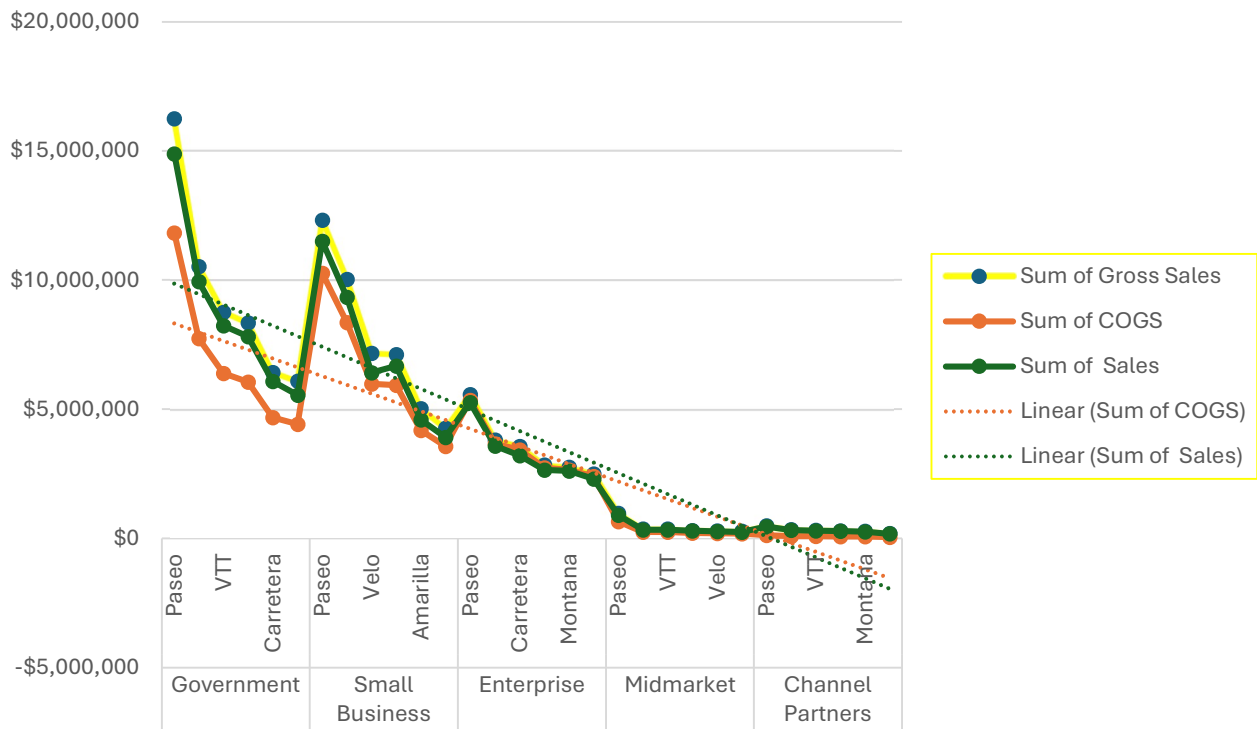
The analysis reveals that "Medium" discount bands have generated the highest number of units sold, followed closely by "High" discount bands. Conversely, products sold without a discount ("None") have demonstrated the lowest unit sales.



Cost Analysis:

A correlation between Cost of Goods Sold (COGS) and profit was observed for both 2013 and 2014 when analyzing Gross Sales, Sales (Gross Sales after Discount), and COGS. This suggests that a direct relationship exists between the cost incurred to produce and sell goods and the subsequent profit

COGS & Sales per Segment & Products



generated.

Government segment with high COGS and Sales and some products in **Midmarket** (Carretera, Velo) and **Channel partners** (Carretera, VTT) with less COGS and Sales. A comprehensive review of marketing strategies is recommended here.

A strong correlation between discounts offered and subsequent sales growth was evident within both **Government and Small business**.

Enterprise, Midmarket and Channel Partners exhibited minimal sales activity, with limited distinction between sales made with or without discounts. To stimulate growth within these regions, a comprehensive review of marketing strategies is recommended.

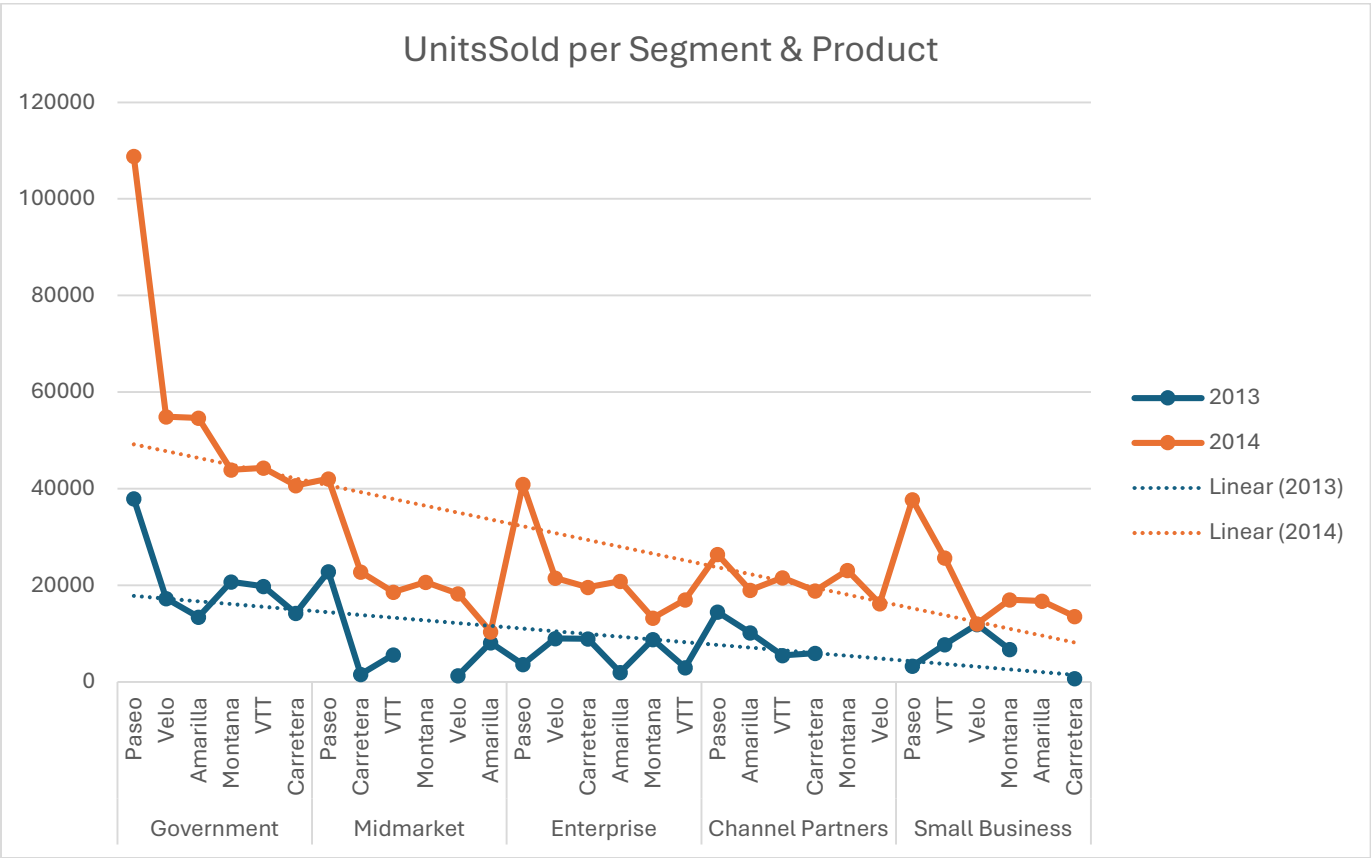
Market Trends:

Trend Analysis:

A substantial increase in unit sales was observed for **Paseo** across all segments during 2013 and 2014. This indicates a highly positive performance trajectory for this product.

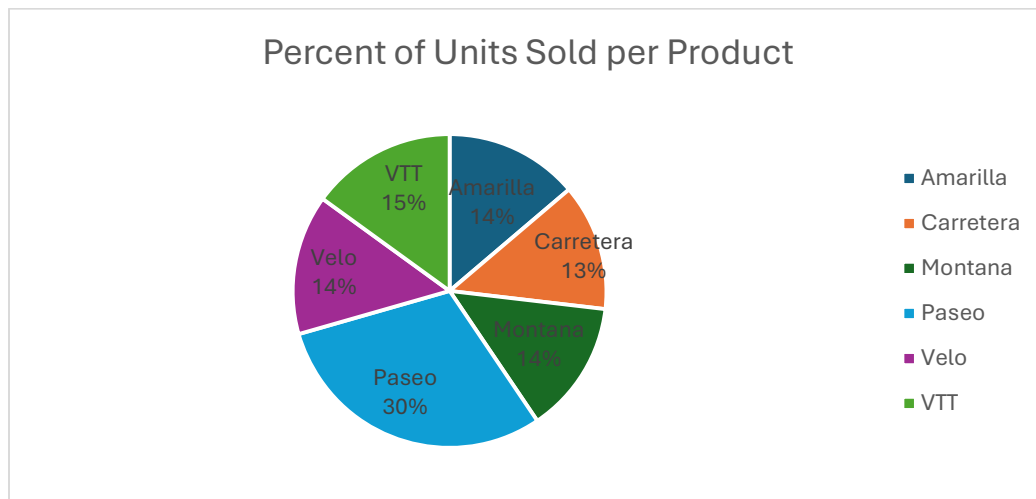
The introduction of new products **Montana** (in Midmarket segment) and **Velo, Montana** (in Channel Partners), **Amarilla** (in Small Business) significantly contributed to the company's overall success in 2014.

While the company experienced overall growth in 2014, unit sales for products **Velo** (in Small Business), **Amarilla** (in Midmarket) remained stagnant compared to the previous year.



Continued...

In 2013 and 2014: Observing **Percentage of Units Sold**, **Paseo** is leader with 30% and **Carretera** with 13%.



Country wise analysis:

For 2013 and 2014, **France and Germany** are key Profit players and **Mexico** with less profit.

In 2013, **Germany** is the key profit player and **USA** with less profit.

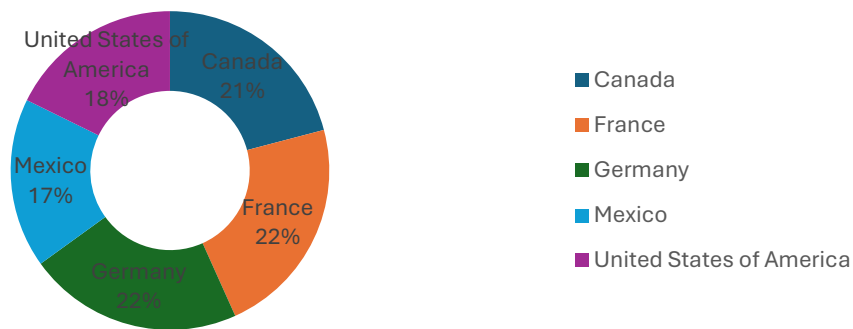
In 2014, **France** is the key profit player and **Mexico** with less profit.

For 2013 and 2014, **USA** got more Sales and **Mexico** least Sales.

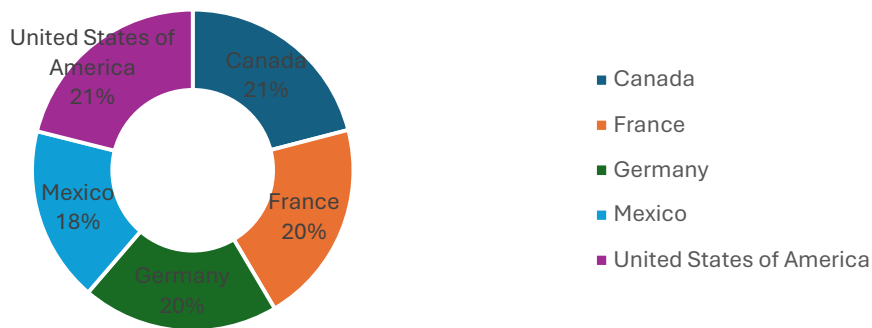
In 2013, **Germany** is the key Sales player, **Mexico** got least Sales.

In 2014, Sales are High in **USA** and least in **Mexico**.

Profit by Country

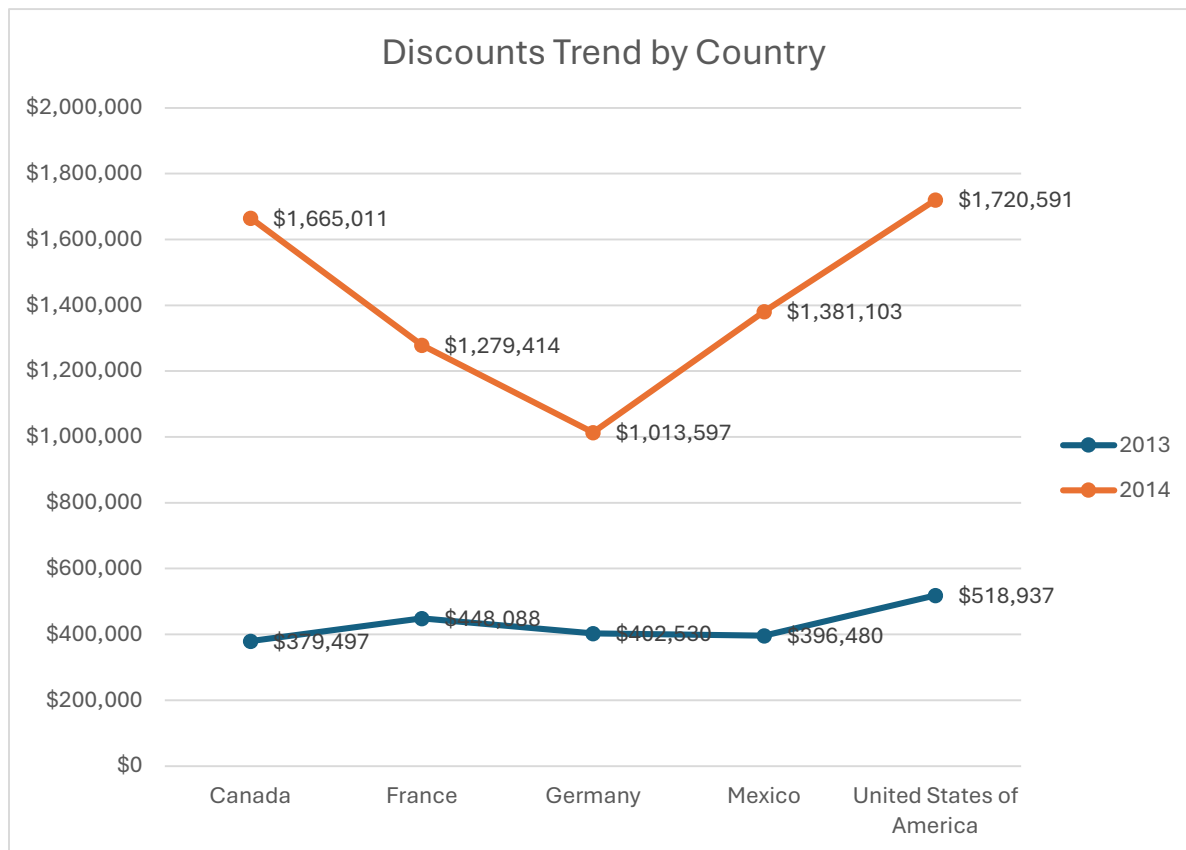


Sales by Country



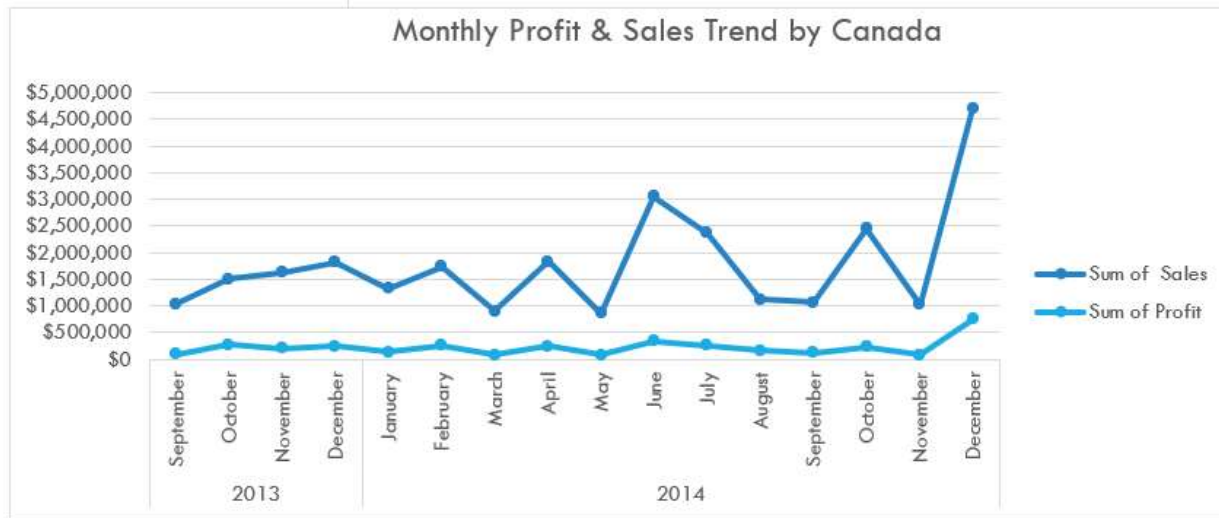
Discount Trend analysis:

Discount patterns varied across products in 2013 and 2014. **USA** received the highest discount in 2013, while **Germany's** discounts were minimal. In contrast, **the USA** experienced increased discounts in 2014, whereas **Canada's** discount levels decreased.

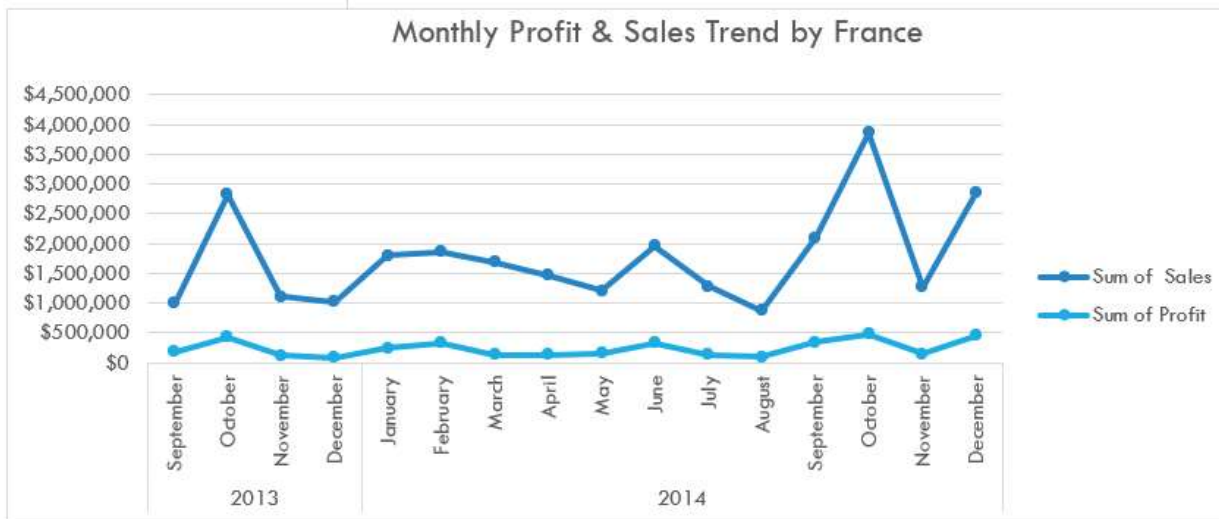


Monthly Profit and Sales Trend:

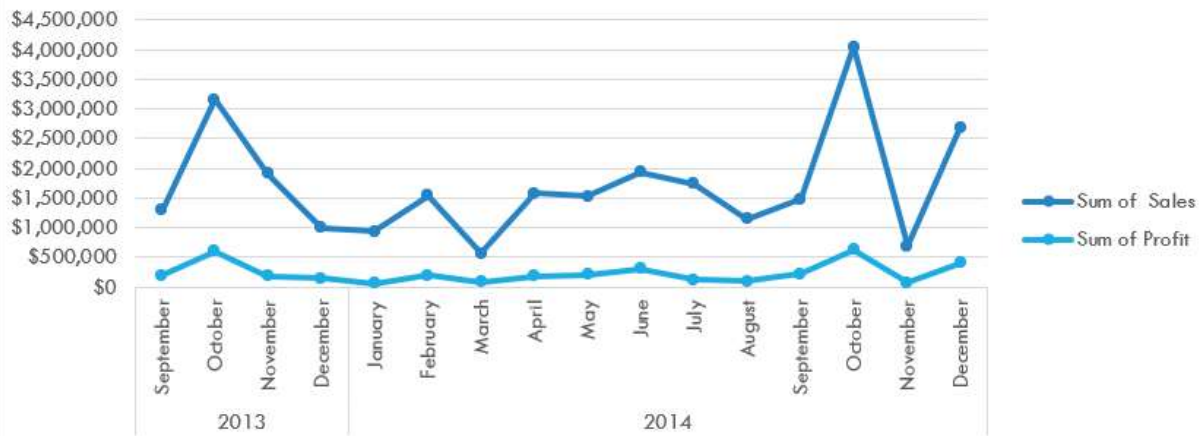
1. **Canada** has maximum sales and Profit in **December**



2. **France, Germany** has maximum sales and profit in **October**

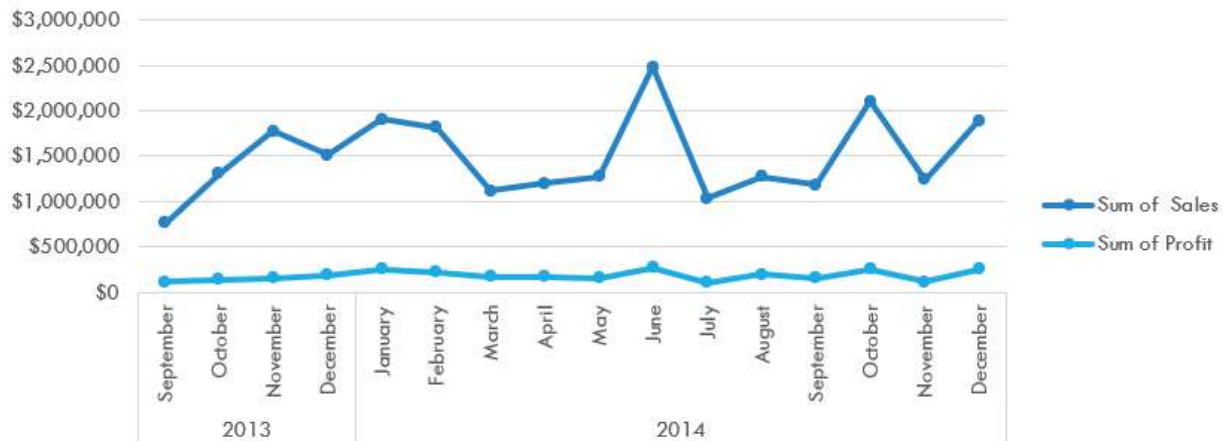


Monthly Profit & Sales Trend by Germany



3. **Mexico** has maximum sales and profit in **June**.

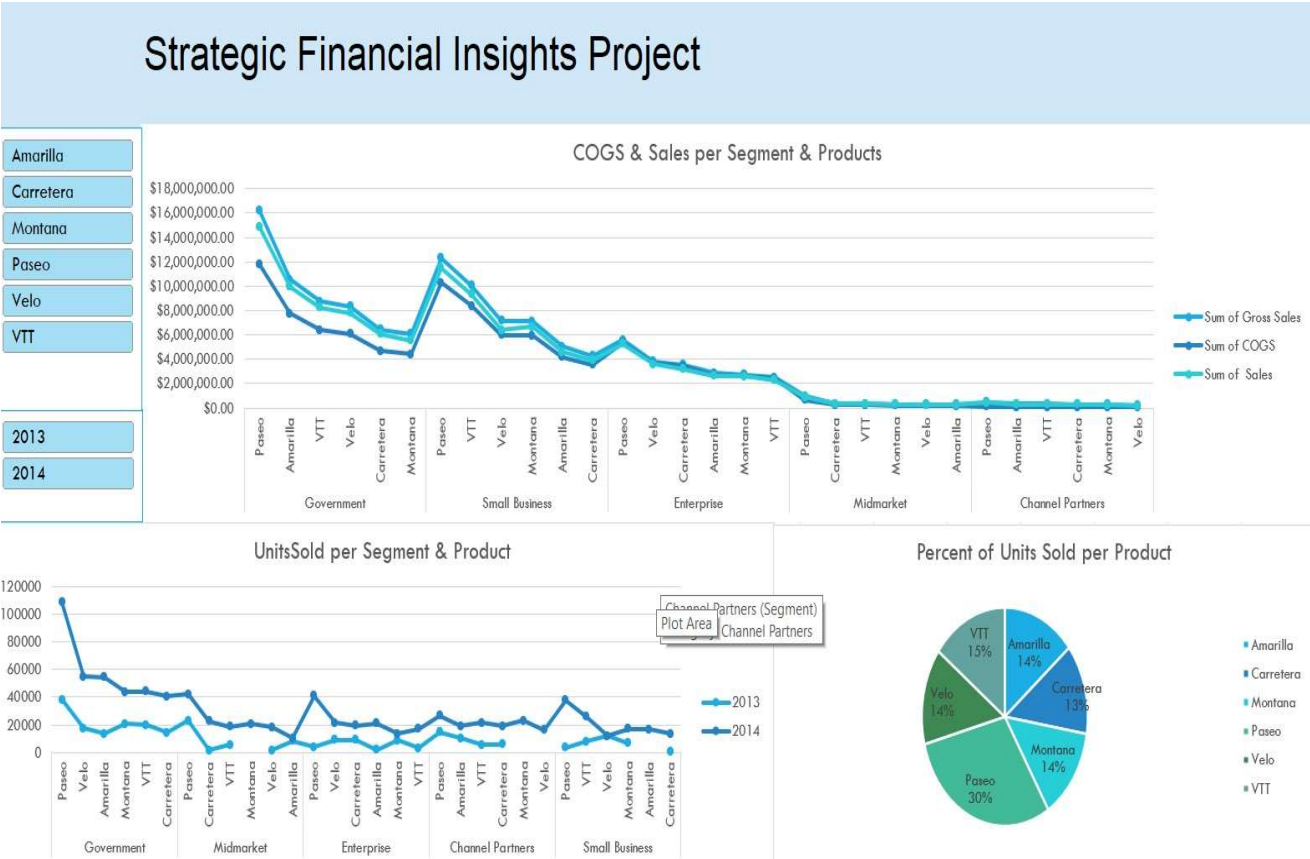
Monthly Profit & Sales Trend by Mexico



4. **USA** has maximum sales and profits in **July**. Need to introduce year end deals.



Dashboards for Reference:



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Dashboards for Reference:

Strategic Financial Insights Project

