CREATION OF A NEW DASHBOARD FOR MANAGEMENT TEAM
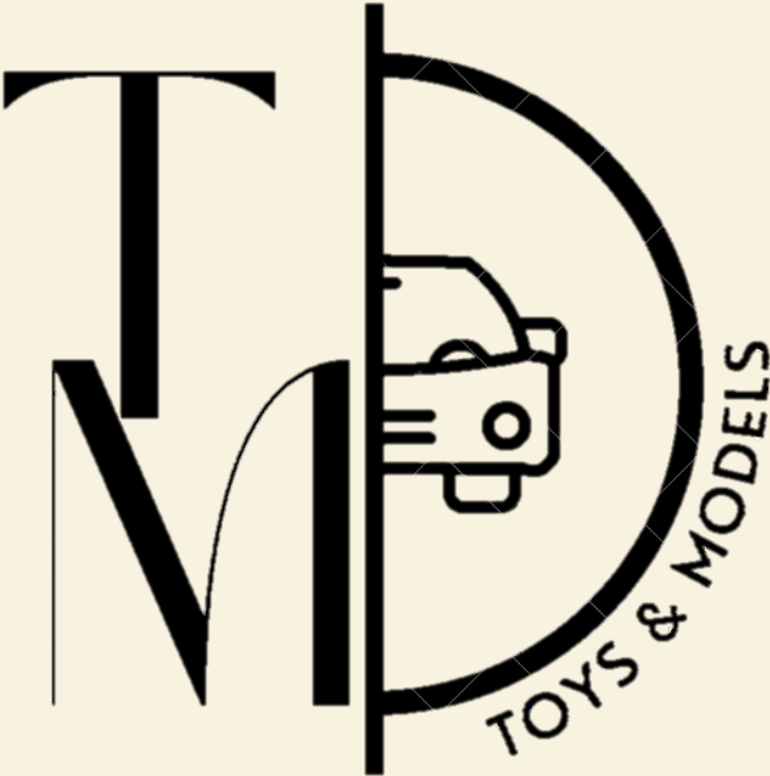
INTRODUCTION

OBJECTIVE

Creating a multi-services dashboard

FIELDS OF ANALYSIS

Sales, Finance, Logistics, Human Resources, CRM (bonus)

EXPECTED DELIVRABLE

A tool that can be refreshed at any time to access to the latest information to manage the company

TOOLS WE USED

- A SQL database listing products, employees, orders, payments…
- MySQL to request this database and cross information
- Microsoft PowerBI as a data visualization tool

DEMONSTRATION OF THE DASHBOARD

HOME

Project overview

This dashboard was developed in September 2023 for the company Toys and Models.
It enables any user to access to a selection of KPIs by clicking on the categories buttons on the bottom of this page:
· Sales
· Finance
· Logistics
· Human Resources
· CRM

All reports and charts are dynamic, so the data can be refreshed at any time.

For any question or feedback, please reach the project team:
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Sales   Finance   Logistics   Human Resources   CRM

DEMONSTRATION OF THE DASHBOARD

DEMONSTRATION OF THE DASHBOARD

SALES

DEMONSTRATION OF THE DASHBOARD

FINANCE

Turnover by country

Margin

Selection of period

Tout

Office	Total turnover
Tokyo	452 978,58
Boston	805 588,56
Sydney	835 728,24
NYC	1 015 048,31
San Francisco	1 192 199,56
London	1 259 100,42

Turnover by country

country ● USA ● France ● UK ● Australia ● Japan

AMÉRIQUE DU NORD

EUROPE

ASIE

Océan Pacifique

Océan Atlantique

AFRIQUE

AMÉRIQUE DU SUD

Océan Indien

AUSTRALIE

Microsoft Bing

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Turnover by country

0,84M (10,38%)   3,01M (37,43%)

1,26M (15,6...)

2,49M (30,9...)

● USA
● France
● UK
● Australia
● Japan

Turnover by country last 2 months

Turnover

0,2M

0,1M

0,0M

USA   France   UK   Aust...   Japan

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DEMONSTRATION OF THE DASHBOARD

FINANCE

Turnover by country

Margin

Selection of period

Tout

AVG ratio by productline
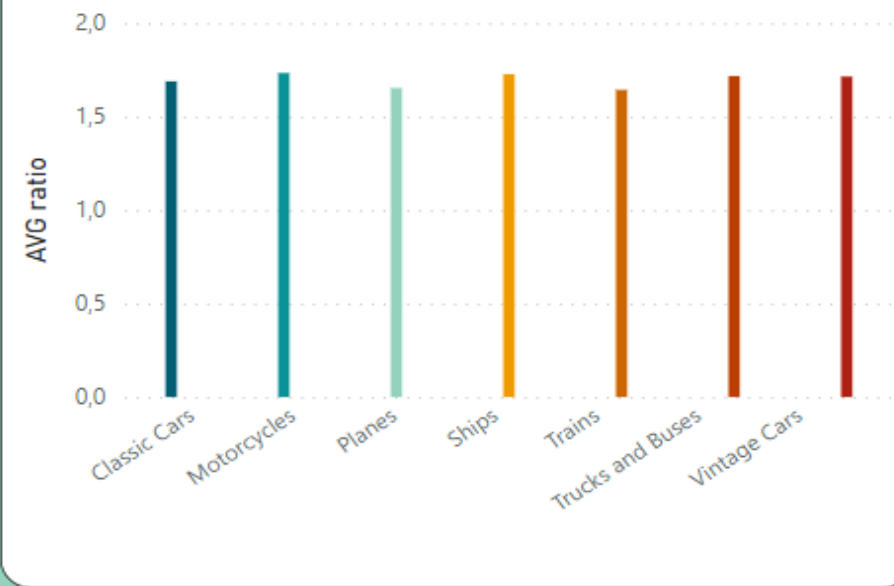
Margin by productline
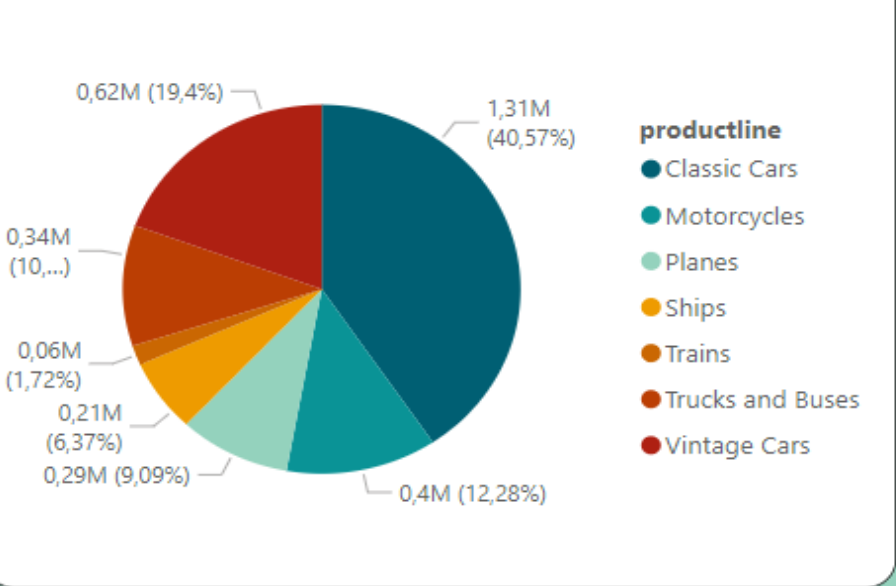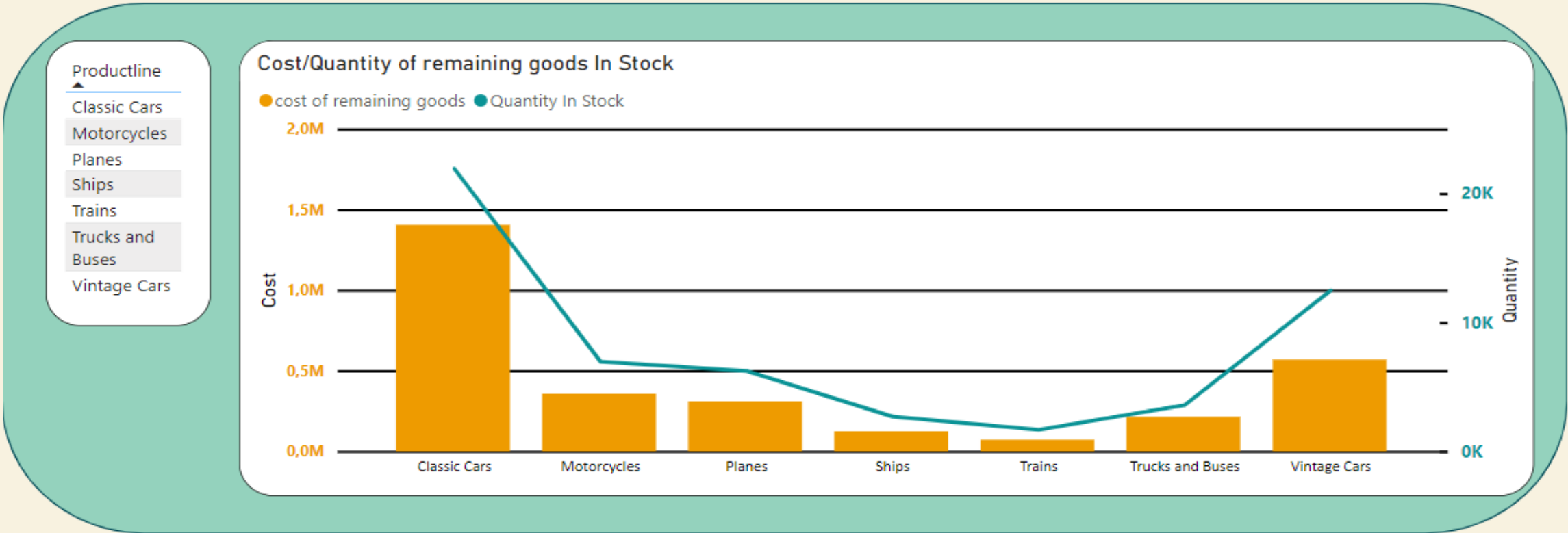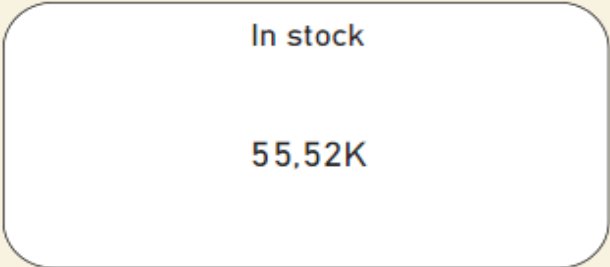
1,31M (40,57%)
0,62M (19,4%)
0,34M (10,...)
0,06M (1,72%)
0,21M (6,37%)
0,29M (9,09%)
0,4M (12,28%)

productline
- Classic Cars
- Motorcycles
- Planes
- Ships
- Trains
- Trucks and Buses
- Vintage Cars

DEMONSTRATION OF THE DASHBOARD

LOGISTICS

Cost Of Goods

Inventory Status

AVG Process time & Orders Issues

In stock	Cost
55,52K	3,05M

Cost/Quantity of remaining goods In Stock

● cost of remaining goods ● Quantity In Stock

Productline

- Classic Cars
- Motorcycles
- Planes
- Ships
- Trains
- Trucks and Buses
- Vintage Cars

DEMONSTRATION OF THE DASHBOARD

LOGISTICS

Cost Of Goods

Inventory Status

AVG Process time & Orders Issues

Top 5 overall ordered products

Rank	Code	In Stock
1	S18_3232	835
2	S18_1342	869
3	S12_1108	362
4	S18_2949	419
5	S18_4600	313

Top 5 overall less ordered products

Rank	Code	In Stock
1	S18_4933	321
2	S24_1046	101
3	S12_3990	566
4	S18_2248	54
4	S700_2047	350

Stock status filter

- [ ] stock good
- [ ] stock high
- [ ] stock low

Stock status

Product code	Stock status	Quantity ordered	Quantity in stock	Ratio ordered/Qty
S10_1678	stock high	21	793	37,76
S10_1949	stock high	77	731	9,49
S10_2016	stock high	39	663	17,00
S10_4698	stock high	44	558	12,68
S10_4757	stock high	39	325	8,33
S10_4962	stock high	72	679	9,43
S12_1099	stock low	78	7	0,09
S12_1108	stock high	66	362	5,48
S12_1666	stock good	69	158	2,29
S12_2823	stock high	71	1000	14,08
S12_3148	stock high	77	691	8,97

| Home | Sales | Finance | Logistics | Human Resources | CRM |

DEMONSTRATION OF THE DASHBOARD

DEMONSTRATION OF THE DASHBOARD

HUMAN RESOURCES

Selection of period

Tout

Employees with the biggest amount of orders during the period in euros

| 2023-05 | Barry Jones | 157 221,16 |
| 2022-05 | Pamela Castillo | 154 665,41 |

Employees with the lowest amount of orders during the period in euros

| 2022-02 | Pamela Castillo | 1 128,20 |
| 2021-10 | Pamela Castillo | 1 627,56 |

Amount of sales et Average amount of sales for the month par employee fullname

● Amount of sales   ● Average amount of sales for the month

Distribution of turnover per country

- France — 39,18%
- USA — 35,62%
- UK — 11,87%
- Australia — 8,89%
- Japan — 4,44%
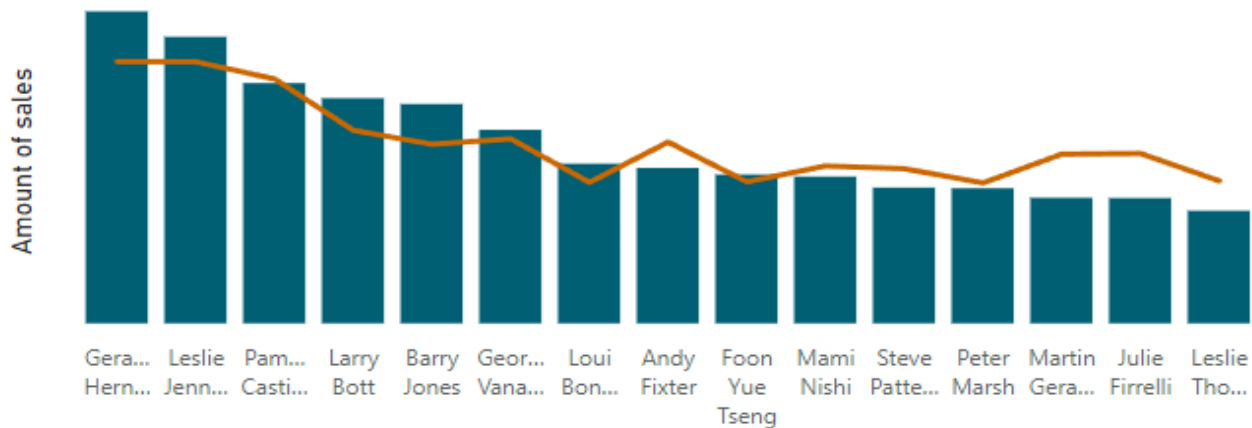
Customers and offices per country in 2023

● Number of customers   ● Number of offices

USA 36, 3; Germany 13; France 12, 1; Spain 7; Australia 5, 1; UK 5, 1; Italy 4; New Zeal... 4; Singapore 3; Japan 2, 1
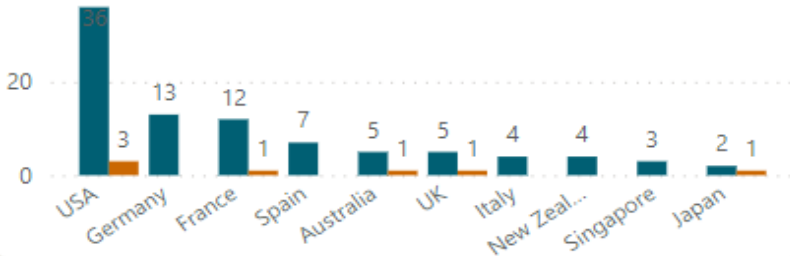
Employees with no order since 2021

Foon Yue Tseng

Martin Gerard

Tom King

Yoshimi Kato

| Home | Sales | Finance | Logistics | Human Resources | CRM |

DEMONSTRATION OF THE DASHBOARD

CRM

Customers RFM Segmentation (recency, frequency, monetary value) for 2022

15 orders or more
- **VIP** — 200k€ or more
- **Top** — 60k€ or more

Less than 15 orders
- **XL** — Less than 60k€
- **M** — 25k€ or more
- **Occasional** — Less than 25k€

1st order in 2022, regardless the number
- **New 2022** — We don't rank them by amount of order as they're new

No order
- **New 2023** — 0€
- **Sleeping** — 0€

Number of customers per segment for 2022

Segment	Count
Sleeping	32
Occasional	22
New	21
M	20
XL	11
New 2023	7
Top	7
VIP	2
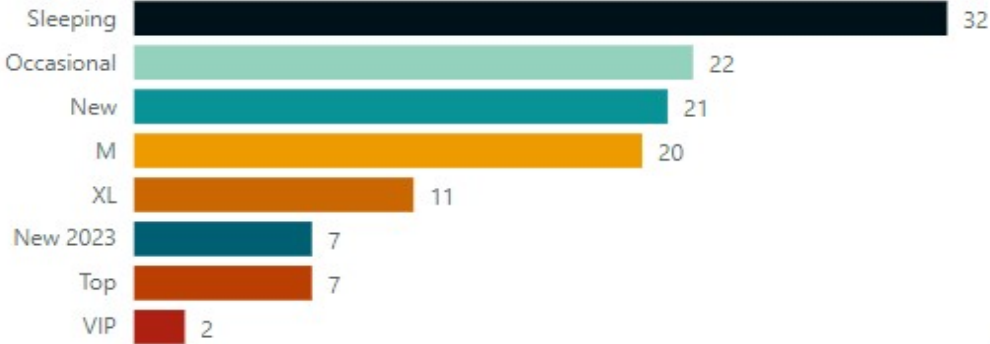
Number of customers, average amount and number of orders for 2022

Segment	Percentage of customers	Average amount of order per segment (in €) ▼	Average number of orders per segment
VIP	1,64%	228 632,12	71,50
Top	5,74%	86 578,23	27,14
New	17,21%	54 780,03	16,95
XL	9,02%	50 067,61	16,45
M	16,39%	36 579,22	11,45
Occasional	18,03%	15 259,36	4,82
New 2023	5,74%	0,00	0,00
Sleeping	26,23%	0,00	0,00
Total	**100,00%**	**31 407,59**	**9,88**

Home	Sales	Finance	Logistics	Human Resources	CRM

SALES CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS AND OBSERVATIONS	RECOMMENDATIONS
The most ordered products are in the "Classic cars" and "Vintage cars" productlines, followed by "Motorcycles", "Planes" and "Trucks and buses". The least ordered belong to the "Ships" and "Trains" categories.	We can continue to expand the range of the most popular productlines to maintain our solid base. We can also launch marketing operations on the least-ordered productlines in order to relaunch them, and think about eventually discontinuing them if things don't improve.
We notice that the months with the best sales are May and June, and the worst in July. However, our sales have risen steadily from year to year in July.	We need to continue our efforts in July to improve our sales to an average level. We can also launch bigger marketing operations before the end-of-year holidays to improve our end-of-year sales.
The average basket has remained constant over the period, but we need to improve if we are to increase sales.	We can achieve this by following the above recommendations, increasing our sales volumes, and expanding or reducing the most or least successful ranges.

FINANCE CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS AND OBSERVATIONS	RECOMMENDATIONS
The Asian market is considerably less advanced in comparison to other markets. The cause could be that our products don't align very well with Japanese culture and expectations.	Within the range of cars, there isn't any Asian brand. We could add new asian car models that would resonate more with this population.
The train falls under the least profitable category, and furthermore, it sells much less than the other products.	We could find another supplier for this category and increase our margin and sells.
There is a lack of data concerning employee payroll costs, rent, or company-owned assets. This is mandatory to accurately assess a company's financial health and plan for the long term.	Please furnish us with such information for a more comprehensive evaluation of the company.

LOGISTICS CONCLSIONS AND RECOMMENDATIONS

CONCLUSIONS AND OBSERVATIONS	RECOMMENDATIONS
Cost of goods: Our stocks accurately reflect the distribution of ordered products, allowing us to easily meet our customers' needs.	We must follow the sales trend to make sure they match well with average ordered quantity per period.
Average processing time (order date to shipping date): Over the entire exercise, we observe an average processing time of 4 days.	We can benchmark our competitors to know if our positioning is answering our customers' expectations.
Order issues: The main issue encountered stems from canceled orders.	We need to focus on the reasons of cancelations to reduce their number in the future.
Inventory status: We have a large amount of stock in proportion to the number of orders.	Note: It would be important to review the inventory based on sales priorities.

HR CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS AND OBSERVATIONS	RECOMMENDATIONS
Each month, we can also easily identify the Sales Rep who are under the average amount of sales and see if those performances are recurrent of isolated.	- Reward the best employees with a stay in a palace or a chef dinner at the restaurant for example. - Organize a 1-1 meeting with the employees who are underperforming to understand their difficulties.
4 Sales Rep employees have no order since 2021.	- Speak with HR team to know if the employees database is up to date.
France and US are often the best countries in terms of turnover.	- Organize a meeting to share best-practices between countries
We have a lot of customers in Germany and Spain, whereas we don't have any office in this country.	- Make a deep analysis to know if it could be interesting to open local offices.

CRM CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS AND OBSERVATIONS	RECOMMENDATIONS
The biggest part of our database is composed of sleeping customers.	- Run a reactivation marketing action to wake them up. Example: a special discount or gift if they order again.
The Top and VIP represents only 8% of our database but make a big part of our turnover.	- Make sure we pamper them. Example: the possibility for them to order some novelties before other customers, invitation to a special event in their country (Roland Garros, Olympic Games…).
The 2022 New customers seem to be good customers, they have a similar behavior than XL customers.	- Ensure they'll become loyal by offering them some advantages for instance. Example: a case of Champagne bottles delivered at the office for Holiday Season.

CONCLUSION

DIFFICULTIES ENCOUNTERED

- Lack of informations in some fields
(ex. Finance, HR)

WHAT WE COULD HAVE DONE BETTER

- Better understanding our client's needs thanks to
regular meetings