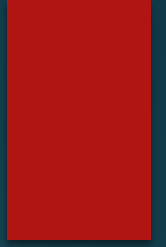# FINANCIAL ANALYSIS REPORT AT MICROSOFT BY DOREEN WATHIMU

DATA UNDERSTANDING

▶ The company is currently experiencing low revenue returns and we want to know the reason why.

▶ I as a Data Analyst am tasked with analyzing financial data to provide insights and recommendations for improving budget performance and identifying cost-saving opportunities. I aim to understand the profitability, sales trends and revenue generation of product based on segment, country and sale date.

▶ The insights derived from the analysis will inform decision-making and strategic planning for future budgeting.

BUSINESS UNDERSTANDING

- GOALS

- 1. Identify trends and patterns in sales such as product popularity, seasonal variations and effectiveness of different marketing strategies.

- 2. Track profit margin so as to understand the profitability of the business.

- 3. Make informed business decisions based on the findings.

- 4. Manage to analyze sales performance of different products across different countries and segments.

DATA UNDERSTANDING

► This financial worksheet was provided by Microsoft. The dataset contains the sales data of a product, categorized by different segments and countries, along with sales ,costs ,profit and date information.

► The dataset has 701 rows and 16 columns.

► Some of the column description are:

   ► Segment-Includes government ,midmarket ,channel partners, enterprise, small business.

   ► Country- where the product was sold.

Sales by Country

-Shows total sales for each country.

-The United States of America and Canada have the highest sales, followed by Mexico and Germany.

Sales by Country

- Canada
- Germany
- France
- Mexico
- United States of America
- (blank)
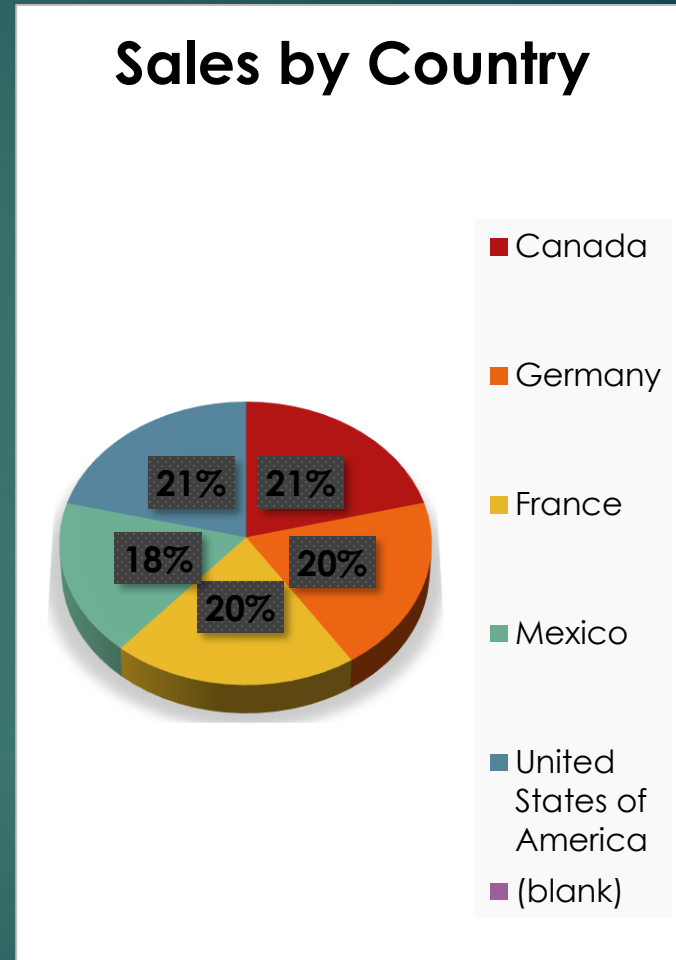
Profit Margin by Segment

-Shows the profit of each customer segment.

-The midmarket segment has the highest profit followed by enterprise and then government.

-This indicates that the company is profitable in serving mid-market and enterprise customers.

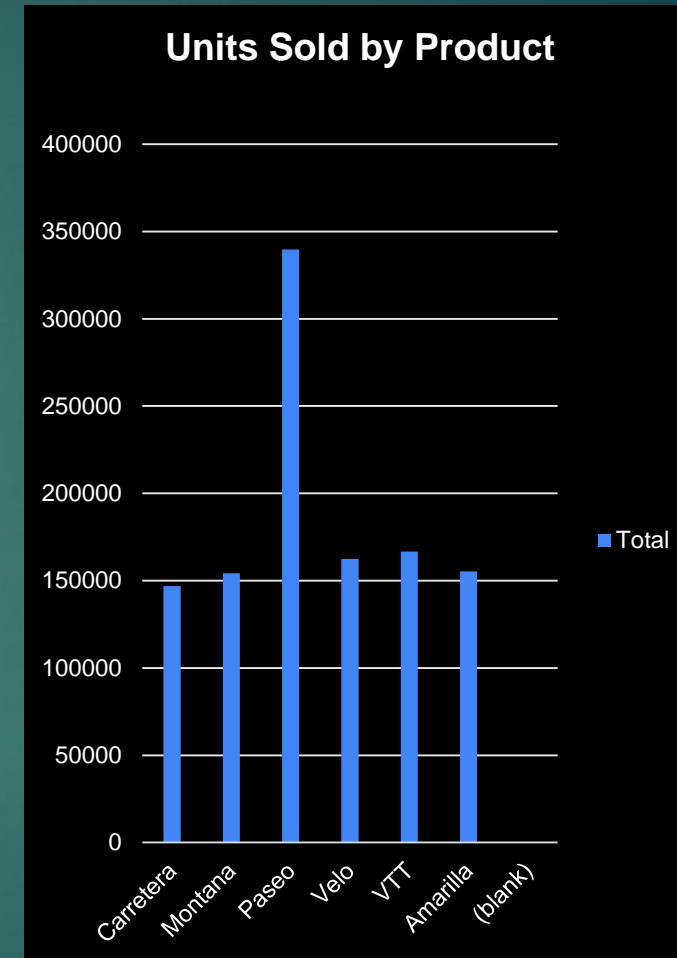
Profit Margin by Segment
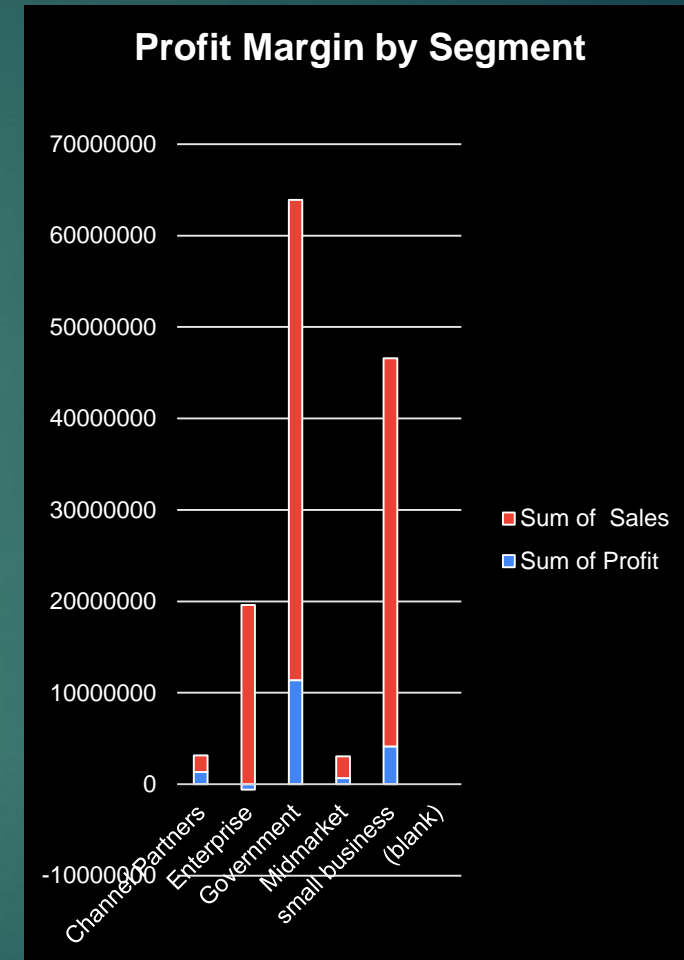
Profit by Month

-Shows the profit of each month.

-Highest profit is in October.
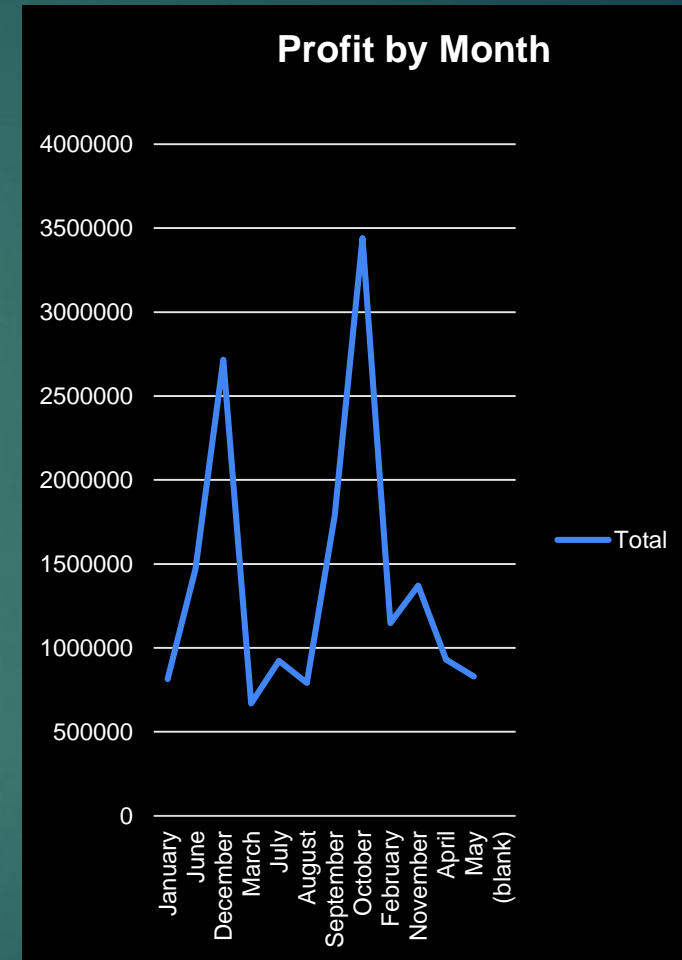
Units Sold by Product
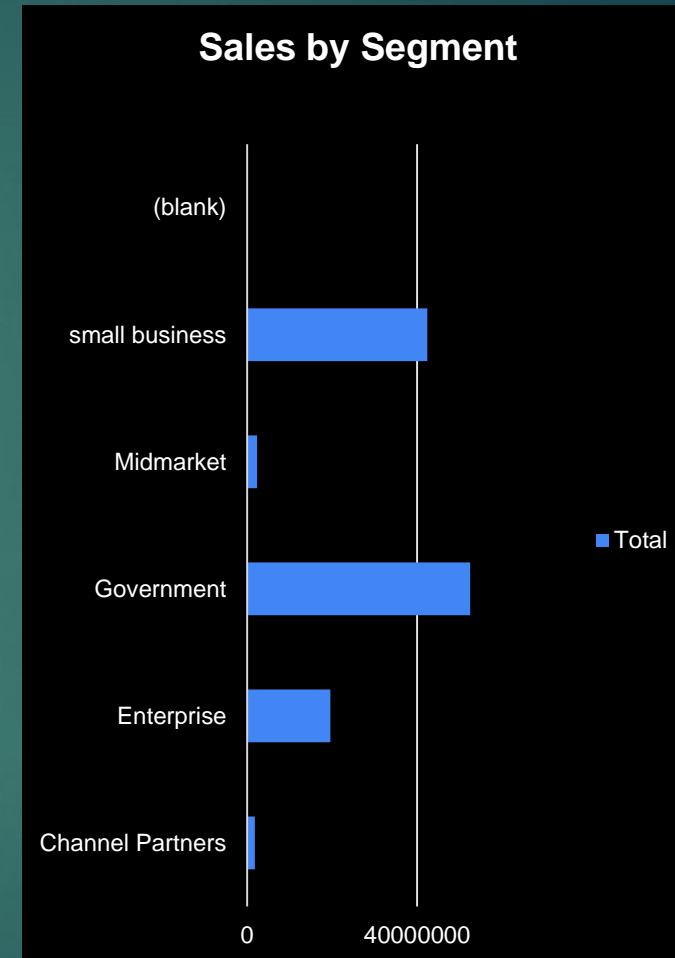
-Shows the number of unit sold to the customer .

-The highest sold product is Paseo showing that it is the most sought for.
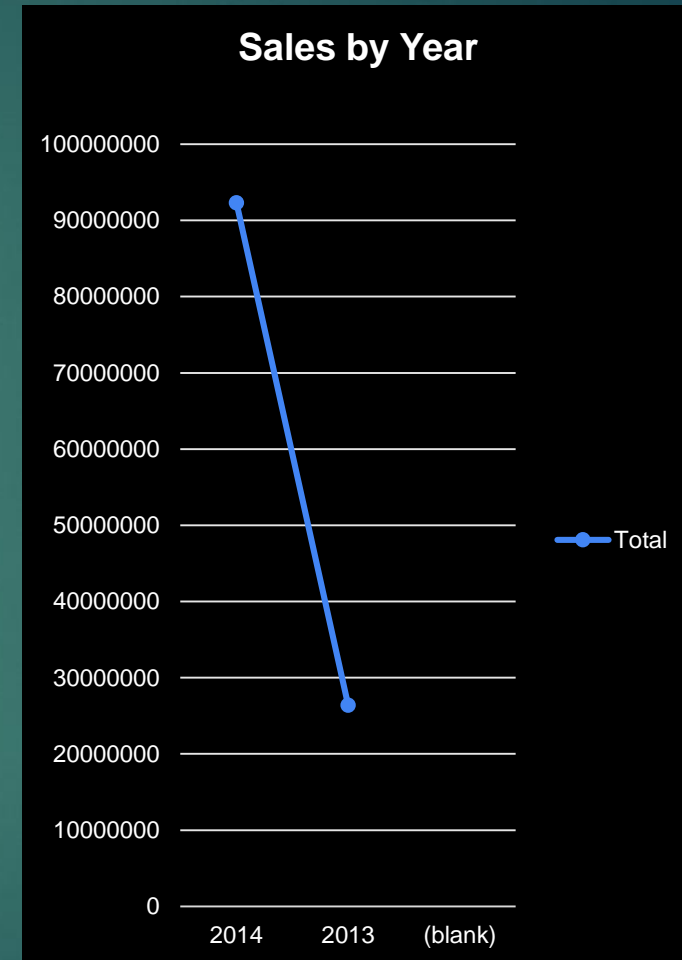
Sales by Segment

-Shows the total sales for each customer segment.

-The government has the highest followed by small businesses.

Sales by Year

-Shows total sales for each year.

-The sales are gradually increasing by year.

Sales by Year

CONCLUSION

▶ Government segment drives a significant amount of sales: Government sales consistently rank among the highest across different countries.

▶ Germany has high sales in various segments: Germany is a strong market for the company, with high sales in both Government and Midmarket segments.

▶ Mexico shows a mixed performance: Mexico has varying sales performance across different segments, with some segments showing high sales (Government) and others showing lower sales (small business).

▶ The report provides insights into sales trends over time showing the seasonality across different months and years.

▶ Canada has highest distribution of products.

RECOMMENDATION

- 1. Implement a standardized format for the Discount band column to ensure consistency across all entries.

- 2.Conduct a detailed analysis of product margins across different segments ,countries and products to identify the factors contributing to high and low margins.

- 3.Analyze sales volume data to identify underperforming segments and regions.