Project #1: Sales & Returns Performance Analysis Report Project Overview

This project analyzes sales performance and product returns using the Sample - Superstore Sales Dataset. The objective is to identify sales and return trends, assess profit impact, and provide actionable insights to optimize business performance.

1. Objectives Section:

- Analyze annual sales and profit trends (2018-2021).
- Measure returns rates and profit loss due to returns.
- Identify subcategories with the highest return rates and profit losses.
- Highlight key geographical regions with the most returns.

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2. Tools Used:

- Excel: Data cleaning, standardization, and preprocessing.
- Tableau: Data visualization and dashboard creation

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3. Data Cleaning & Preparation:

The dataset was cleaned to ensure accuracy before analysis:

- Removed duplicates & missing values.
- Standardized column names.
- Converted data types where necessary.
- Created calculated fields in Tableau for Return Rate (%) and Profit Loss ($).

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4. Key Insights:

- **Annual Sales & Profit Performance (2018-2021):**
  - Sales increased by **77.68%** from **$575,174 (2018)** to **$1,031,128 (2021)**.
  - Profit also grew, but at a slower rate, indicating areas for improvement.
- **Return Rate (%) & Profit Loss Due to Returns ($):**
  - The overall return rate is **26.0%**, meaning **1 in 4 orders** are returned.
  - Estimated total profit loss from returns: **$96,965.**

- **Top Returned Product Subcategories:**
  - The Binders, Paper, and Phones subcategories have the highest returns.
  - Understanding product-specific return reasons could help reduce losses.
- **Regions with Highest Product Returns:**
  - Major return hotspots are California, Texas, and New York.
  - These insights can guide location-based return reduction strategies.
- **Return Loss by Subcategory:**
  - Copiers, Chairs, and Appliances contribute the highest profit losses.
  - Strategic adjustments in pricing, quality, or return policies can help.

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5. Tableau Dashboard:

The final Tableau dashboard presents these insights, allowing businesses to track key performance metrics, pinpoint high-return products, and refine sales strategies

- **Dashboard Name:**
  - Sales & Returns Performance Dashboard
- **Dashboard Preview:**

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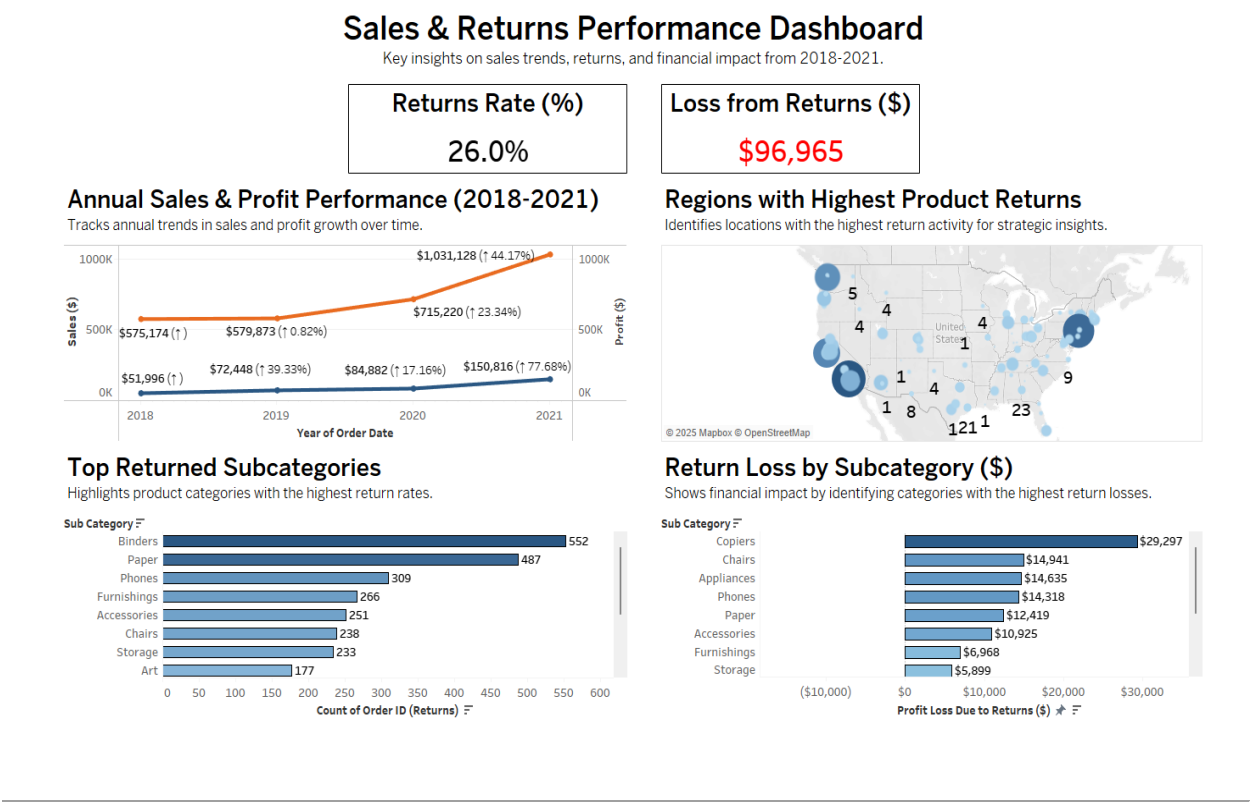
6. Conclusion & Recommendations:

- **Monitor & Reduce High Return Products:**
  - Improve product quality and customer satisfaction to reduce return rates in high-return categories (Binders, Paper, Phones)
- **Implement Location-Based Return Strategies:**
  - Target return reduction strategies in California, Texas, and New York with localized return policies and incentives.
- **Profit Optimization:**
  - Address losses in Copiers, Chairs, and Appliances by optimizing pricing and policies.

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7. File Export & Submission:

- Tableau Workbook (.twbx) saved for portfolio use.
- Exported Dashboard Image/PDF for sharing.
- Finalized Documentation (this document) saved as a PDF.

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8. Final Thoughts:

This project showcases expertise in data-driven decision-making, trend analysis, and operational insights. The structured approach and Tableau visualizations reinforce key competencies aligned with Business Analyst, Operations Analyst, and CRM Specialist roles.