

Customer Sales & Product Performance Dashboard - Executive Summary

Report Date: May 10, 2025

Key Performance Metrics

- **Total Sales:** \$2.30M
- **Total Profit:** \$286.40K
- **Total Orders:** 5,009
- **Average Order Value:** \$458.61

Sales Performance

- **Annual Trend:** Consistent growth from 2018-2021, with 2021 showing highest sales and profit
- **Regional Distribution:**
 - West: \$725.46K (31.5%)
 - East: \$678.78K (29.5%)
 - Central: \$504K (21.9%)
 - South: \$391.72K (17.1%)

Product Analysis

- **Top Sub-Categories:** Phones, Chairs, Storage, Tables
- **Profit Leaders:** Paper, Envelopes, Copiers (highest profit ratios)
- **Profit Concerns:** Tables, Bookcases, Supplies (lowest profit ratios)
- **Discount Application:** Highest in Office Supplies, followed by Furniture and Technology

Customer Insights

- **Top Contributors:** Sean Miller, Tamara Chand, Raymond Buch, Tom Ashbrook
- **Segment Performance:** Consumer segment leads in volume, followed by Corporate and Home Office
- **Returns Correlation:** Higher sales regions show corresponding higher return rates

Strategic Recommendations

1. **Regional Focus:** Target growth initiatives in underperforming South and Central regions
2. **Product Strategy:** Review pricing and costs for low-profit sub-categories; rationalize discount application in Office Supplies
3. **Customer Engagement:** Implement key account management for top customers; develop segment-specific approaches
4. **Profit Optimization:** Balance inventory investment across categories while focusing on high-margin products

This dashboard effectively visualizes critical business metrics supporting data-driven decision-making. Implementation of these recommendations based on dashboard insights can enhance sales growth, profit margins, and customer satisfaction in the coming fiscal period.