

Data-Driven Storytelling Presentation:

ACCOUNT PERFORMANCE METRICS AND SALES TREND

**BY
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INTRODUCTION

Problem Statement

- J.P. Morgan Chase & Co. is a leading global financial services firm that offers services and operates worldwide.
- The company aims to analyze the account performance metrics over the last 5 years (2017-2021) and the factors contributing to its compound annual growth rate (CAGR) in unit sales. This includes identifying opportunities for further improvement.

Business Questions

- Examining the total unit sales for each year.
- Analyzing the year-over-year growth in sales.
- Identifying which account types are surpassing others in terms of unit sales.
- Calculating the average 5-year compound annual growth rate (CAGR) based on different account types.
- Evaluating the top-performing and bottom-performing accounts.

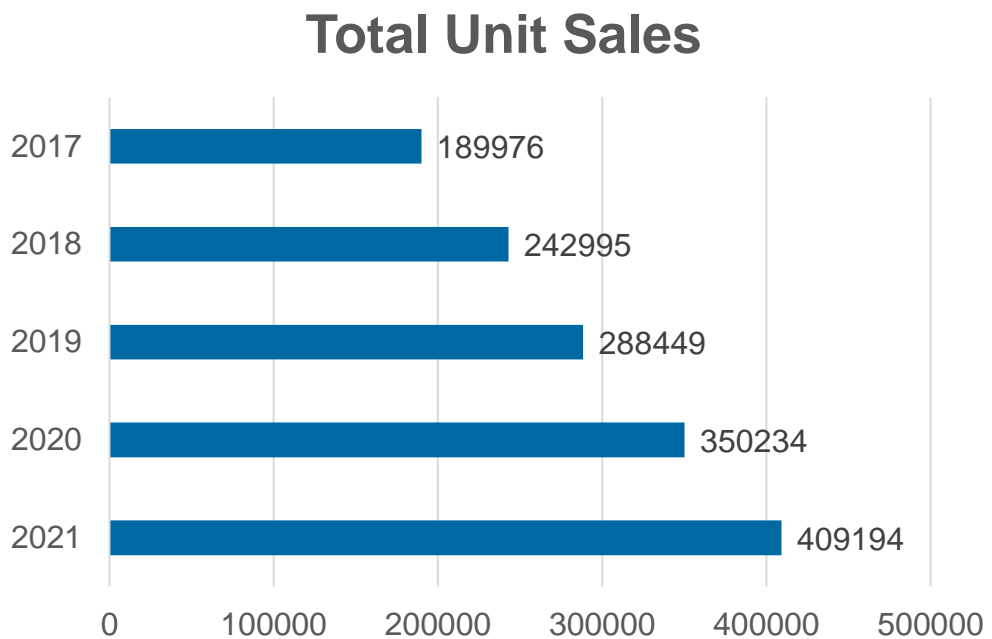
DATA MODELLING

Utilizing Power Query in **MS-Excel**, transformed the data for improved organization, giving a more structured foundation for necessary analysis.

| Account Name | Account Address | Decision Maker | Phone Number | Account Type | Product 1 | Product 2 | Product 3 | Social Media | Coupons | Catalog Inclusion | Posters | 5 YR CAGR | Year | Sales |
|--------------|---|------------------|----------------|----------------|-----------|-----------|-----------|--------------|---------|-------------------|---------|--------------|------|-------|
| SB 1 | 2131 Patterson Road, Brooklyn NY 11201 | Dorothy Rizzo | (880) 283-6803 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.463527493 | 2017 | 1982 |
| SB 1 | 2131 Patterson Road, Brooklyn NY 11201 | Dorothy Rizzo | (880) 283-6803 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.463527493 | 2018 | 5388 |
| SB 1 | 2131 Patterson Road, Brooklyn NY 11201 | Dorothy Rizzo | (880) 283-6803 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.463527493 | 2019 | 7063 |
| SB 1 | 2131 Patterson Road, Brooklyn NY 11201 | Dorothy Rizzo | (880) 283-6803 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.463527493 | 2020 | 7208 |
| SB 1 | 2131 Patterson Road, Brooklyn NY 11201 | Dorothy Rizzo | (880) 283-6803 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.463527493 | 2021 | 9093 |
| SB 2 | 3685 Morningview Lane, New York NY 10013 | Lawson Moore | (711) 426-7350 | Small Business | Yes | Yes | Yes | No | Yes | Yes | Yes | 0.254898269 | 2017 | 2786 |
| SB 2 | 3685 Morningview Lane, New York NY 10013 | Lawson Moore | (711) 426-7350 | Small Business | Yes | Yes | Yes | No | Yes | Yes | Yes | 0.254898269 | 2018 | 3804 |
| SB 2 | 3685 Morningview Lane, New York NY 10013 | Lawson Moore | (711) 426-7350 | Small Business | Yes | Yes | Yes | No | Yes | Yes | Yes | 0.254898269 | 2019 | 4121 |
| SB 2 | 3685 Morningview Lane, New York NY 10013 | Lawson Moore | (711) 426-7350 | Small Business | Yes | Yes | Yes | No | Yes | Yes | Yes | 0.254898269 | 2020 | 6210 |
| SB 2 | 3685 Morningview Lane, New York NY 10013 | Lawson Moore | (711) 426-7350 | Small Business | Yes | Yes | Yes | No | Yes | Yes | Yes | 0.254898269 | 2021 | 6909 |
| SB 3 | 2285 Ladybug Drive, New York NY 10013 | Vin Hudson | (952) 952-5573 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.68595057 | 2017 | 1209 |
| SB 3 | 2285 Ladybug Drive, New York NY 10013 | Vin Hudson | (952) 952-5573 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.68595057 | 2018 | 1534 |
| SB 3 | 2285 Ladybug Drive, New York NY 10013 | Vin Hudson | (952) 952-5573 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.68595057 | 2019 | 1634 |
| SB 3 | 2285 Ladybug Drive, New York NY 10013 | Vin Hudson | (952) 952-5573 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.68595057 | 2020 | 4302 |
| SB 3 | 2285 Ladybug Drive, New York NY 10013 | Vin Hudson | (952) 952-5573 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.68595057 | 2021 | 9768 |
| SB 4 | 2930 Southern Street, New York NY 10005 | Susana Huels | (491) 505-6064 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.796068285 | 2017 | 906 |
| SB 4 | 2930 Southern Street, New York NY 10005 | Susana Huels | (491) 505-6064 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.796068285 | 2018 | 1251 |
| SB 4 | 2930 Southern Street, New York NY 10005 | Susana Huels | (491) 505-6064 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.796068285 | 2019 | 2897 |
| SB 4 | 2930 Southern Street, New York NY 10005 | Susana Huels | (491) 505-6064 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.796068285 | 2020 | 4499 |
| SB 4 | 2930 Southern Street, New York NY 10005 | Susana Huels | (491) 505-6064 | Small Business | Yes | Yes | Yes | Yes | Yes | Yes | Yes | 0.796068285 | 2021 | 9428 |
| SB 5 | 2807 Geraldine Lane, New York NY 10004 | Shanna Hettinger | (412) 570-0596 | Small Business | Yes | Yes | No | Yes | Yes | Yes | Yes | 0.425825839 | 2017 | 1421 |
| SB 5 | 2807 Geraldine Lane, New York NY 10004 | Shanna Hettinger | (412) 570-0596 | Small Business | Yes | Yes | No | Yes | Yes | Yes | Yes | 0.425825839 | 2018 | 1893 |
| SB 5 | 2807 Geraldine Lane, New York NY 10004 | Shanna Hettinger | (412) 570-0596 | Small Business | Yes | Yes | No | Yes | Yes | Yes | Yes | 0.425825839 | 2019 | 2722 |
| SB 5 | 2807 Geraldine Lane, New York NY 10004 | Shanna Hettinger | (412) 570-0596 | Small Business | Yes | Yes | No | Yes | Yes | Yes | Yes | 0.425825839 | 2020 | 4410 |
| SB 5 | 2807 Geraldine Lane, New York NY 10004 | Shanna Hettinger | (412) 570-0596 | Small Business | Yes | Yes | No | Yes | Yes | Yes | Yes | 0.425825839 | 2021 | 5873 |
| SB 6 | 7778 Cherry Road, Bronx NY 10467 | Roy McGlynn | (594) 807-4187 | Small Business | Yes | Yes | Yes | No | Yes | Yes | No | 0.390755806 | 2017 | 2341 |
| SB 6 | 7778 Cherry Road, Bronx NY 10467 | Roy McGlynn | (594) 807-4187 | Small Business | Yes | Yes | Yes | No | Yes | Yes | No | 0.390755806 | 2018 | 6105 |
| SB 6 | 7778 Cherry Road, Bronx NY 10467 | Roy McGlynn | (594) 807-4187 | Small Business | Yes | Yes | Yes | No | Yes | Yes | No | 0.390755806 | 2019 | 7777 |
| SB 6 | 7778 Cherry Road, Bronx NY 10467 | Roy McGlynn | (594) 807-4187 | Small Business | Yes | Yes | Yes | No | Yes | Yes | No | 0.390755806 | 2020 | 7891 |
| SB 6 | 7778 Cherry Road, Bronx NY 10467 | Roy McGlynn | (594) 807-4187 | Small Business | Yes | Yes | Yes | No | Yes | Yes | No | 0.390755806 | 2021 | 8758 |
| SB 7 | 48 Winchester Avenue, New York NY 10024 | Lorena Posacco | (678) 294-8103 | Small Business | Yes | No | No | No | No | Yes | No | -0.611392026 | 2017 | 9252 |
| SB 7 | 48 Winchester Avenue, New York NY 10024 | Lorena Posacco | (678) 294-8103 | Small Business | Yes | No | No | No | No | Yes | No | -0.611392026 | 2018 | 8499 |
| SB 7 | 48 Winchester Avenue, New York NY 10024 | Lorena Posacco | (678) 294-8103 | Small Business | Yes | No | No | No | No | Yes | No | -0.611392026 | 2019 | 991 |
| SB 7 | 48 Winchester Avenue, New York NY 10024 | Lorena Posacco | (678) 294-8103 | Small Business | Yes | No | No | No | No | Yes | No | -0.611392026 | 2020 | 448 |
| SB 7 | 48 Winchester Avenue, New York NY 10024 | Lorena Posacco | (678) 294-8103 | Small Business | Yes | No | No | No | No | Yes | No | -0.611392026 | 2021 | 211 |
| SB 8 | 8735 Squaw Creek Drive, Brooklyn NY 11214 | Juanita Wisozk | (305) 531-1310 | Small Business | Yes | No | Yes | Yes | No | Yes | No | 0.576225547 | 2017 | 1581 |

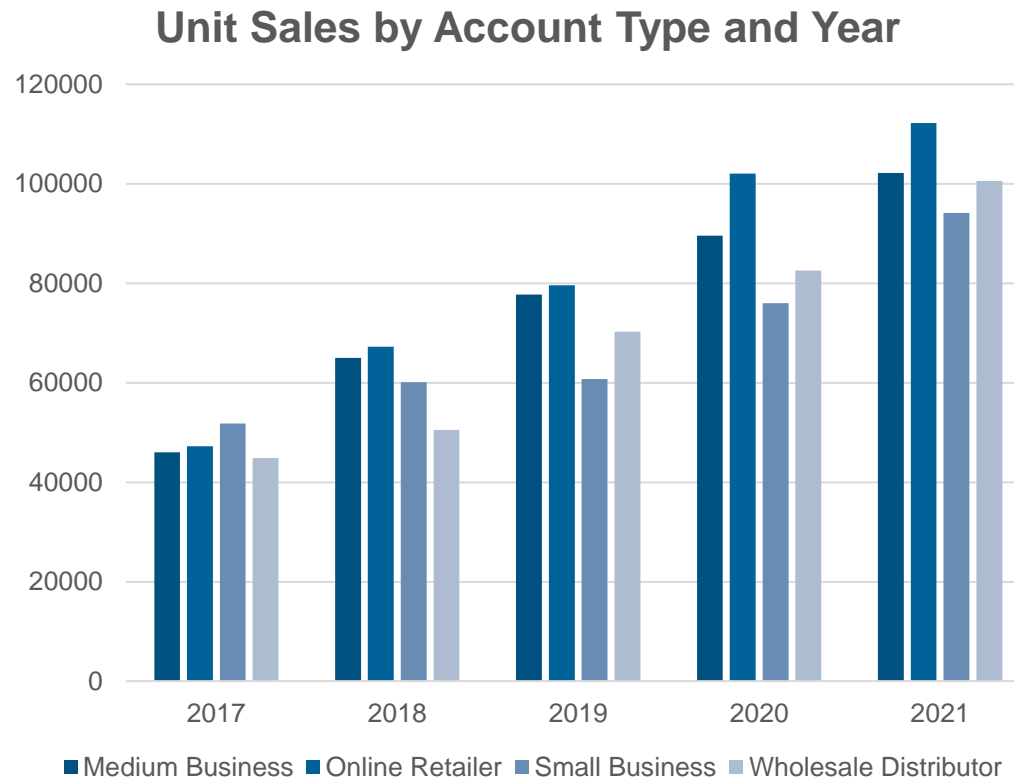
DATA ANALYSIS & VISUALIZATION

Overall, our unit sales growth has been good, with a 5- year CAGR of **21%**



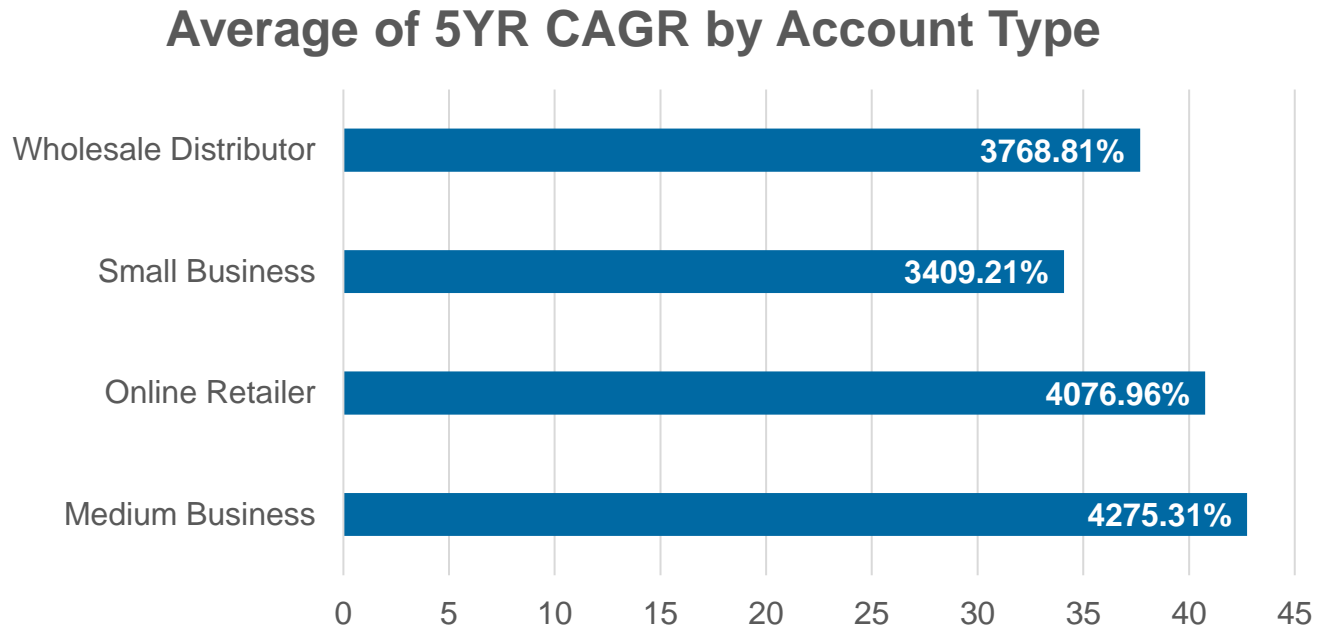
DATA ANALYSIS & VISUALIZATION

Directing our sales resources and adjusting our sales mix towards **online retailer accounts** could lead to enhanced sales growth.



DATA ANALYSIS & VISUALIZATION

However, **Medium Business** account type is experiencing higher profitability driven by the average 5-year CAGR.

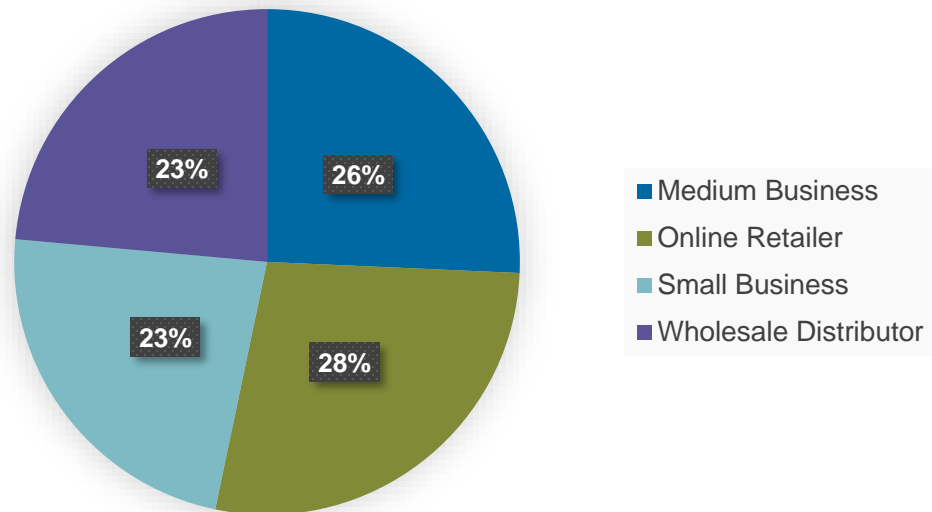


DATA ANALYSIS & VISUALIZATION

Online Retailer generated the highest sales volume, totaling **408,515 units**, which accounts for **28%** of the total sales volume.

Medium Business followed closely with a sales volume of **380,568 units**, making up **26%** of the total sales volume.

Sales by Account Type

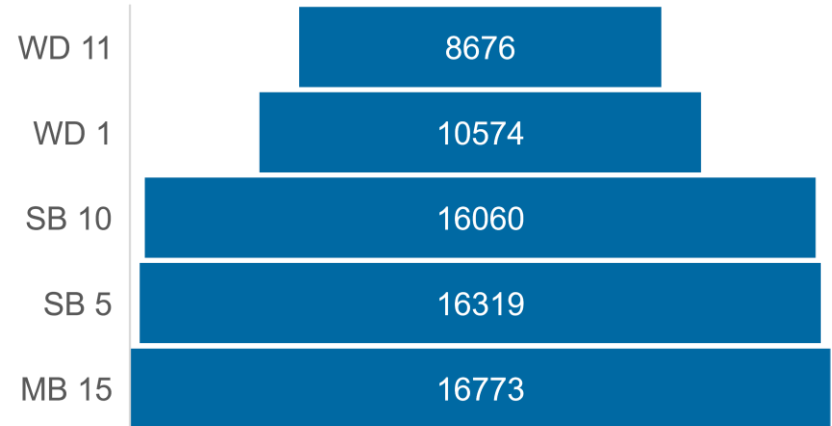


DATA ANALYSIS & VISUALIZATION

TOP 5 ACCOUNTS



BOTTOM 5 ACCOUNTS



The account name **MB4** proved to be the **highest**-performing account, achieving an impressive sales volume of approximately **39,413 units**.

On the other hand, accounts **WD11**, **WD1**, and **SB10** performed at the **lowest** level in terms of sales volume. Specifically, WD11 accounted for 8,676 units, WD1 for 10,574 units, and SB10 for 16,060 units, all in terms of sales volume

SUMMARY

- Despite satisfactory overall sales performance, there is ample room for significant improvement.
- Discontinuing poorly performing accounts would free up valuable sales and marketing resources.
- Notably, the past five years have witnessed the most robust sales growth in the online retailer account category.
- By reallocating the resources saved from closing underperforming accounts to online retailer accounts, sales growth could be maximized.
- It is advisable to promptly close these underperforming accounts and launch an initiative to identify high-potential online retailer accounts deserving of increased sales and marketing focus.