



Furniture Pro
& Co.

NAVIGATION

Executive

Cusotmer

Target View

What-If

Pareto

FILTERS

Clear all...

Region

All

State

All

Segment

All

Category

All

Executive | Dashboard

2018

2019

2020

2021

Total Sales(Net)

\$657.71K

2020 : \$573'084

Variance: ▲+14.8%

Pct Target Achieved

104.18%

2020 : 103.97%

Variance: ▲+0.2%

Profit Margin %

12.74%

2020 : 13.43%

Variance: ▼-5.1%

Total Returns

\$75.5K

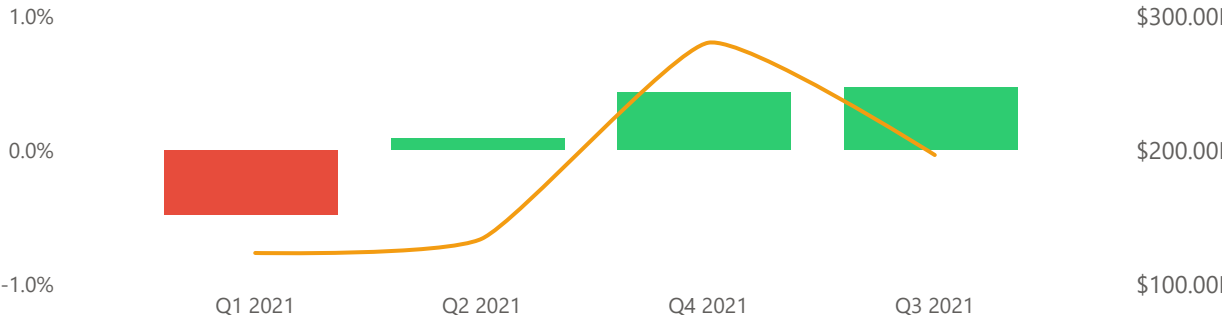
2020 : \$36'122

Variance: ▲+109.0%

Sales Trend Quarterly

Quarterly

Monthly

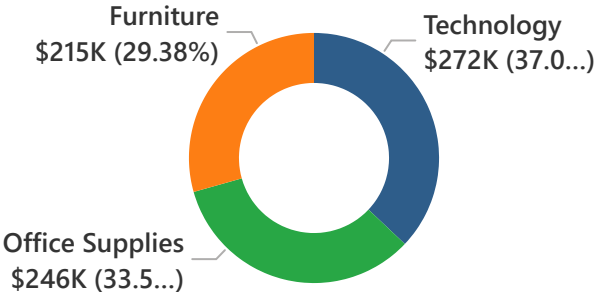


Sales by Category

Category

Region

Segment



Sales Trend by Region

Region / Segment / Category	Sales 2020	Sales 2021	YoY Growth %	Performance
West	\$164,939	\$197,954	20.02%	Excellent
South	\$88,227	\$117,015	32.63%	Excellent
East	\$175,853	\$197,697	12.42%	Good
Central	\$144,065	\$145,047	0.68%	Stable

Category	Total Returns	Return Rate
Technology		
Copiers	\$14,880	2
Phones	\$13,590	1
Accessories	\$4,806	
Machines	\$2,822	

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Customer Scoring Calculation at

CUSTOMER ANALYSIS | Dashboard

2018

2019

2020

2021

New Customers

11

2020 : 51 New Customers

Variance: ▼-78.4%

Total Customers

693

2020 : 638 Customers

Variance: ▲+8.6%

Customer Retention Rate

87.46%

2020 Retention: 78.88%

Variance: ▲+10.9%

High Value Segment EOY

158

↗ 19.9% of total customers Till EOY

New Customer Sales

7.51K

New Customer Avg Discount

10.87

New Customer Avg Quantity

3.22

Top 5 Salespeople in | State: All States | Region: All Regions | Segment: All Segments | Category: All Categories | Year: 2021

Sales_person	Rank	Total Sales	Total Orders	Avg Sales Amount	Avg Discount	Total Profit
Addison Carrington	1	14,273.22	3	4757.74	26.67	\$6,427.86
Elijah Livingston	2	13,433.96	9	1492.66	25.56	\$4,351.11
DeCherney Matt	3	11,311.57	7	1615.94	24.29	\$4,129.23
Isla Atkinson	4	9,065.96	8	1133.25	21.25	(\$3,605.46)
Cheyenne Robinson	5	8,848.11	9	983.12	14.44	\$2,950.31

Customer Segmentation Matrix: Engagement and Revenue by RFM Score

Recency > Frequency	1	2	3	4	5
1	Hibernating 8 (1.01%)	Hibernating 19 (2.40%)	At Risk 63 (7.94%)	Can't Lose Them 101 (12.74%)	Can't Lose Them 8 (1.01%)
2	Hibernating 2 (0.25%)	Hibernating 3 (0.38%)	At Risk 23 (2.90%)	Can't Lose Them 113 (14.25%)	Can't Lose Them 17 (2.14%)
3	About to Sleep 2 (0.25%)	About to Sleep 4 (0.50%)	Need Attention 12 (1.51%)	Exploring 51 (6.43%)	Exploring 8 (1.01%)
4		New Customers 3 (0.38%)	Potential Loyalists 26 (3.28%)	Loyal Customers 103 (12.99%)	Loyal Customers 24 (3.03%)
5		New Customers 5 (0.63%)	Potential Loyalists 25 (3.15%)	Loyal Customers 142 (17.91%)	Champions 31 (3.91%)

Loyal Customers

Can't Lose Them

Exploring

Champions

Potential Loyalists

At Risk

Need Attention

New Customers

Hibernating

About to Sleep

Bonus Customer Scoring System | Action: All Actions | Segment: All Segments | Region: All Regions | Year: 2021

MONITOR - Low Priority

RETAIN - VIP Treatment

WIN-BACK - Urgent Action

NURTURE - General Cam...

TARGET - Cross-sell/Upsell

Customer Name	Customer Value Score	Propensity Score	Churn Risk Score
Christine Kargatis	12.00	0.50	467.50
Cynthia Arntzen	12.00	0.50	467.50
Eugene Barchas	12.00	0.50	467.50
Eugene Hildebrand	12.00	0.50	467.50
Frank Atkinson	12.00	0.50	467.50
Julie Kriz	12.00	0.50	467.50



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Target | Dashboard

2018

2019

2020

2021

Sales

\$733.22K

Target

\$605.98K

Target Gap

+\$127.23K

Sales vs Target PCT

↗ +21.0%

Missed States

3

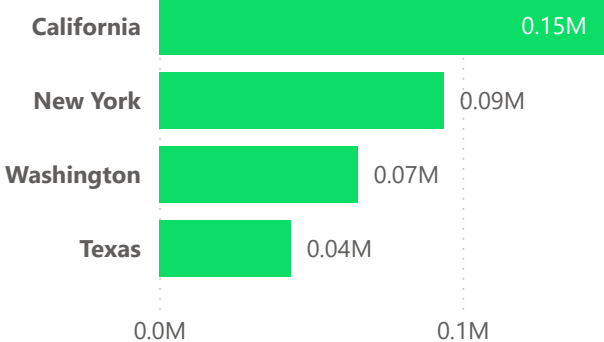
Select No. of States

4

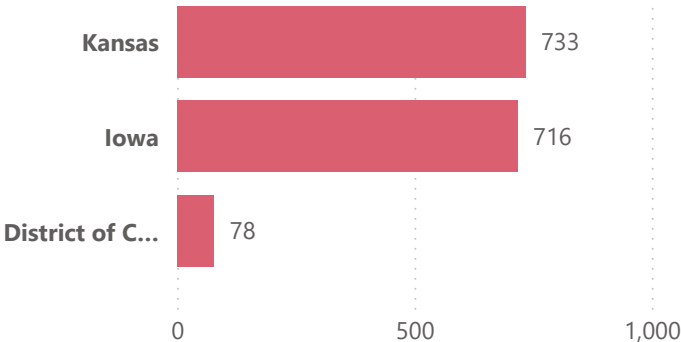
Filter By

- ☒ Total Sales
- ☐ Total Target
- ☐ Target Achievement %
- ☐ Profit Margin %

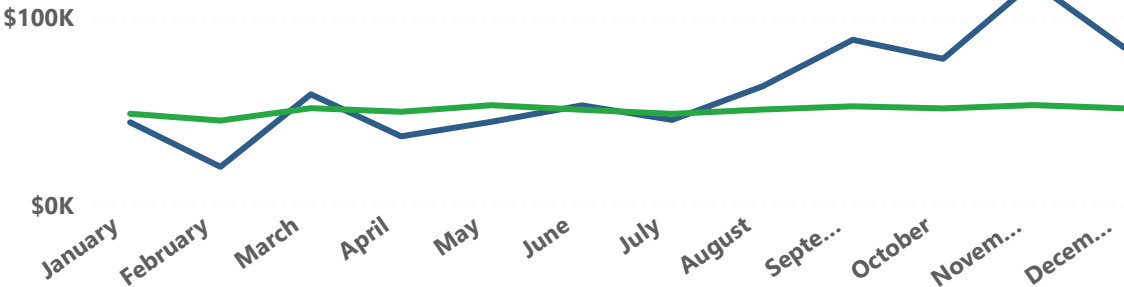
Top States



Bottom States



● Total Sales ● Total Target



% Target Achieved by Region & State

Region	2018	2019	2020	2021
Central				
Illinois	162.09	123.85	105.15	
Indiana	219.82	79.72	190.93	
Iowa	1,434.75	10,707.50	2,997.84	1
Kansas	530.04	1,064.44	2,159.56	3
Michigan	134.77	134.75	131.64	



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WHAT-IF ANALYSIS

Dashboard

2018

2019

2020

2021

Current Profit

\$93.44K

Base Scenario

Predicted Profit

\$18.86K

↘ -79.8% vs baseline

Volume Increase

12.80%

Assumption 1.2x
volume per 1%
discount

↗ Expected increase

Net Effect

-\$74.58K

↘ Negative impact

Consumer Discount (0-30%)

10

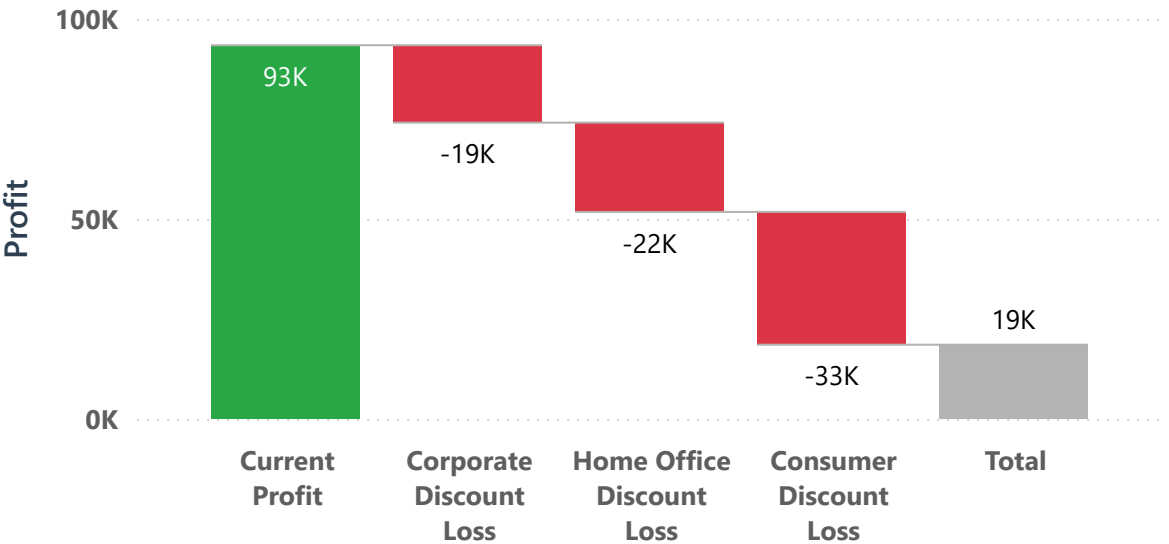
Corporate Discount (0-30%)

8

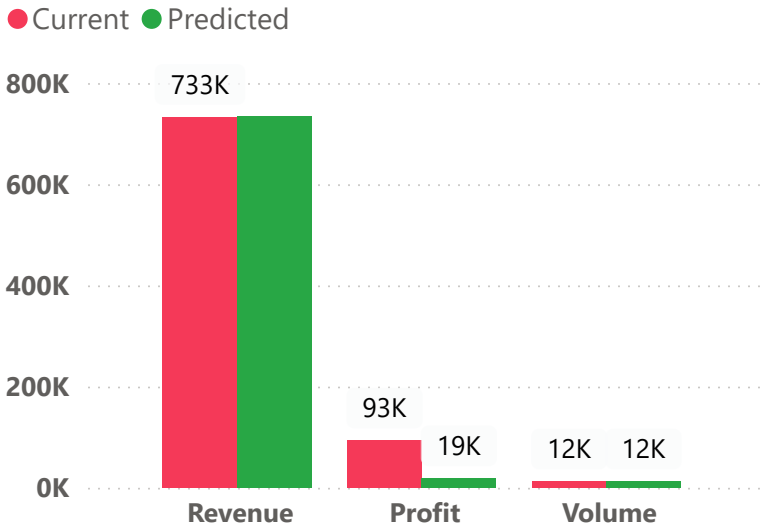
Home Office Discount (0-30%)

14

Profit Impact Analysis by Discount Segment



Current vs Predicted Performance





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PARETO ANALYSIS | Dashboard

Top Customers
49%

No. of Customers
389

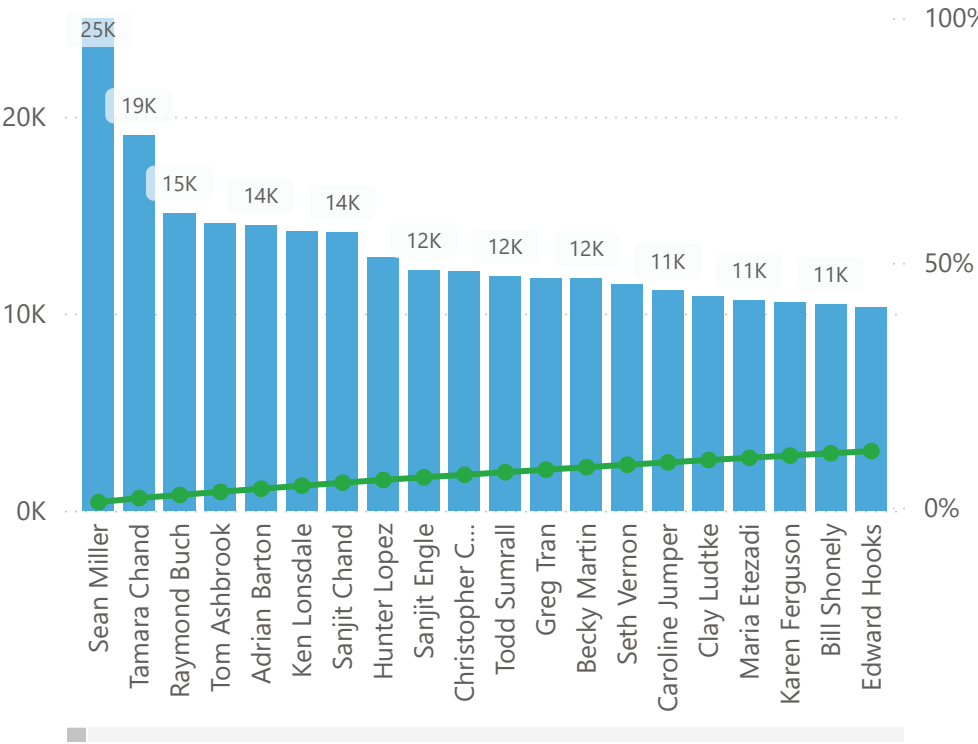
Top Customers Sales
1.82M

Sales Contribution %
79.37%

Customer Percentage

49

Total Sales Cumulative Revenue % Cutt of revenue %



Revenue Analysis Breakdown by Customer

Customer Name	Rank	Rev	Rev GT%	Rev Cum	Rev Cum %
Sean Miller	1	25,043.05	1.09%	25043	1.09%
Tamara Chand	2	19,052.22	0.83%	44095	1.92%
Raymond Buch	3	15,117.34	0.66%	59213	2.58%
Tom Ashbrook	4	14,595.62	0.64%	73808	3.21%
Adrian Barton	5	14,473.57	0.63%	88282	3.84%
Ken Lonsdale	6	14,175.23	0.62%	102457	4.46%
Sanjit Chand	7	14,142.33	0.62%	116599	5.08%
Hunter Lopez	8	12,873.30	0.56%	129473	5.64%
Sanjit Engle	9	12,209.44	0.53%	141682	6.17%
Christopher Conant	10	12,129.07	0.53%	153811	6.70%
Todd Sumrall	11	11,891.75	0.52%	165703	7.21%
Greg Tran	12	11,820.12	0.51%	177523	7.73%
Becky Martin	13	11,789.63	0.51%	189313	8.24%
Seth Vernon	14	11,170.05	0.50%	200784	8.74%

Top 5 Strategic Insights – 2021 Year-End | FurniturePro & Co.

1. Strong Growth, But Margin Under Pressure

We delivered **\$657.7K in sales**, growing **14.8% YoY** and beating the target by **21%** — a fantastic topline outcome. However, our **profit margin slipped from 13.43% to 12.74%**. Growth is being driven at the cost of profitability, indicating the need for **more refined discounting and pricing strategies**.

2. Uneven Regional Performance – Untapped Potential

The **South (+32.63%)** and **West (+20.02%)** are clearly leading our growth. Meanwhile, the **Central region barely grew (+0.68%)**. This gap presents a clear opportunity to **scale best practices from strong regions** to lagging ones — whether through sales enablement, localized promotions, or better customer targeting.

3. Technology Drives Sales, But Returns Raise Flags

With **37% of revenue coming from Technology**, it's our strongest-performing category. However, **Copiers, Phones, and Chairs(accessories)** show high return rates — a warning sign. We must dig into **product quality issues, delivery expectations, or customer education gaps** to protect long-term value.

4. Sales Heavily Skewed — Too Many Low-Value Customers

Our Pareto analysis reveals that it takes **49% of our customer base to reach 80% of revenue**, compared to the expected 20/80 balance. This indicates a **bloated long tail of low-value customers**, and highlights the need to **focus on high-LTV segments**.

5. Retention Strong — But Acquisition Engine Has Stalled

We maintained an impressive **87.46% retention rate**, up 10.9%, which is a major strength. But **new customer acquisition fell 78.4%**, down to just 11 customers. If not addressed, this will become a long-term growth constraint. **Reviving acquisition efforts should be a top priority in 2022.**

Strategic Priorities Going Forward

- Refine **pricing/discounting** strategy to protect profit
- **Replicate South/West playbook** in underperforming regions
- Investigate and resolve **product return issues** in Tech
- Shift focus toward **high-value customer development**
- **Rebuild the acquisition engine** while sustaining retention