Milestone-3

Title: Data Analysis and Insights for Strategic Decision-Making
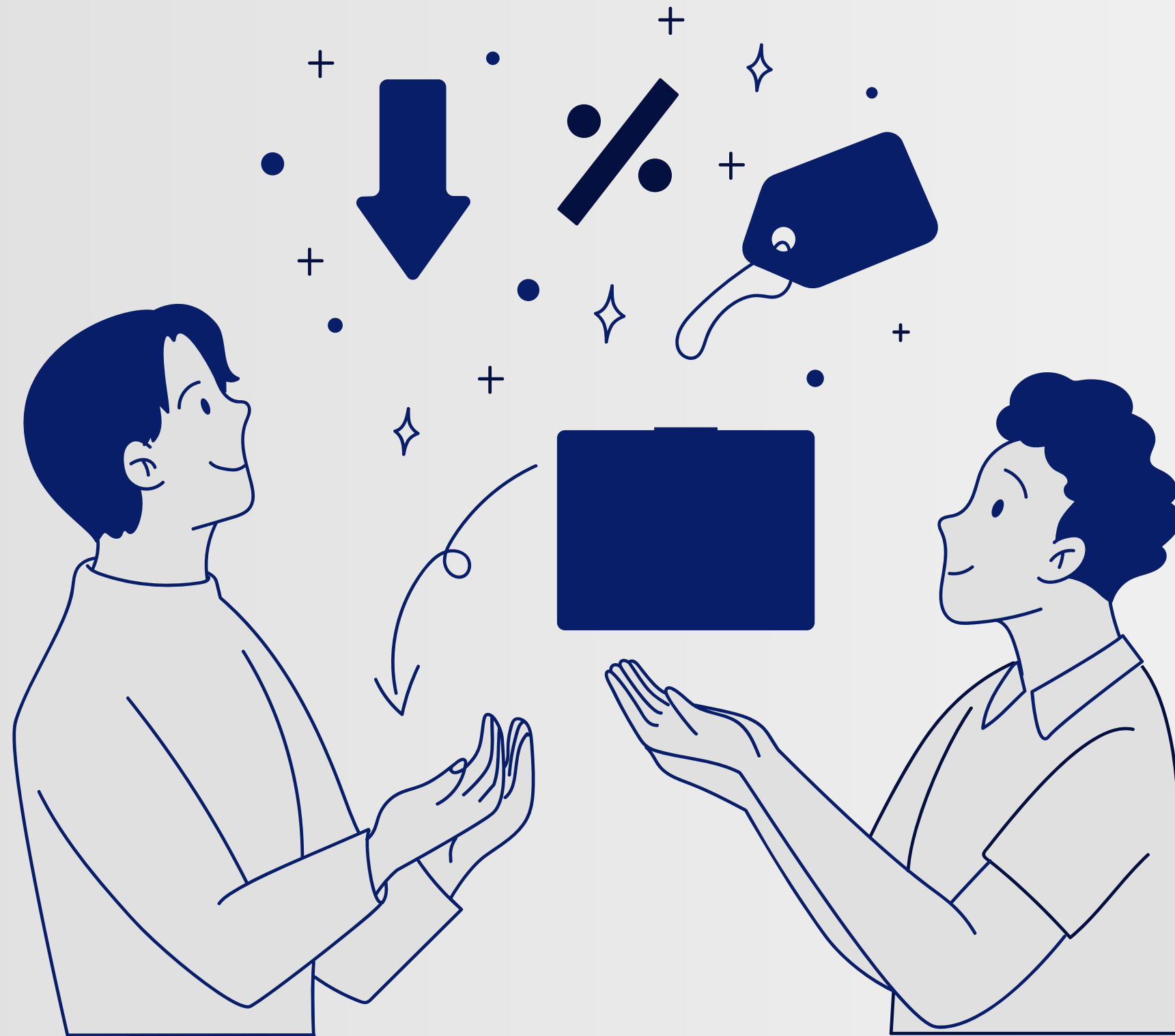
ADVANCE SALES PERFORMANCE DASHBOARD PROJECT

Team Name : Trend Trackers
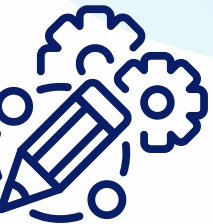
Batch -2

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INTRODUCTION

- This project focuses on sales and profit analysis using an interactive dashboard.
- By analyzing data from various regions, categories, and products, we aim to identify performance trends and profitability drivers.
- The results will support strategic decision-making for revenue optimization.
- Tools and techniques used include Power BI for dashboards and DAX formulas for calculations.

PROJECT OBJECTIVE

Objective:

To leverage data insights to optimize sales performance and profitability across regions, products, and customer segments.

Key Goals:

Evaluate Regional Sales Performance:

Identify high-performing regions and areas for improvement.

Analyze Product and Category Trends:

Highlight top-selling products and profitable categories.

Track Key Metrics:

Monitor Total Sales, Profit Margins, and Average Order Values over time.

Discover Growth Opportunities:

Pinpoint untapped potential in underperforming regions and segments.

Enable Strategic Decision-Making:

Support data-driven strategies for marketing, inventory management, and pricing.

MILESTONES

Data Collection and Cleaning:

Extracted data from various sources like Excel, Dataverse, and SQL databases.
Ensured data integrity and resolved discrepancies.

Dashboard Development:

Built dynamic dashboards with filters for region, category, and year.
Included KPIs like Total Sales, Total Profit, and Average Order Value.

Insight Derivation:

Identified key trends and drivers of performance using DAX calculations.
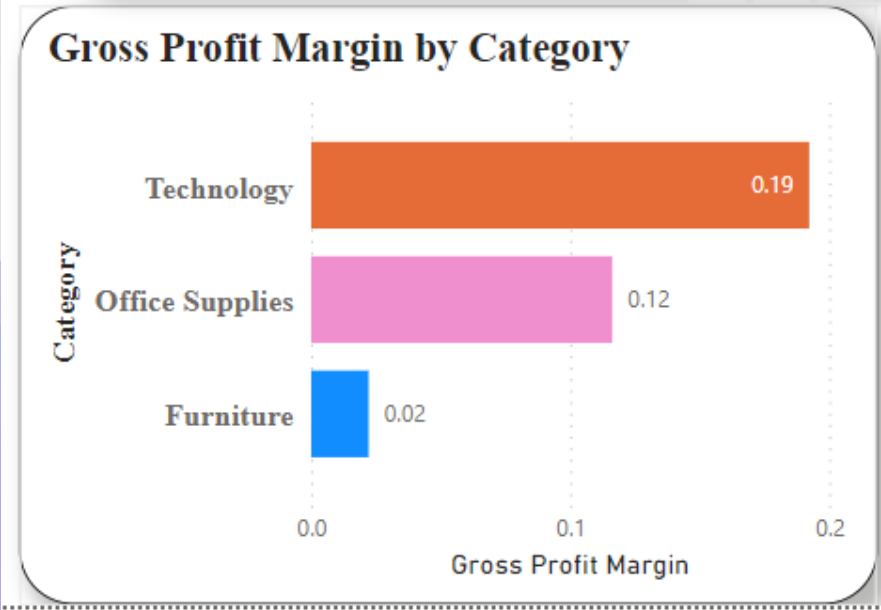Generated visualizations to highlight significant data points.

Recommendations and Action Plan:

Proposed actionable steps based on findings to improve sales and profitability.
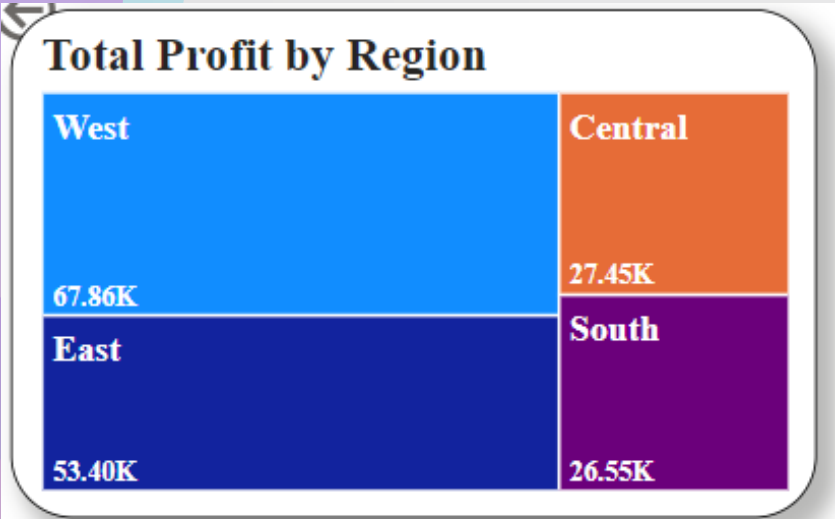
DASHBOARD OVERVIEW
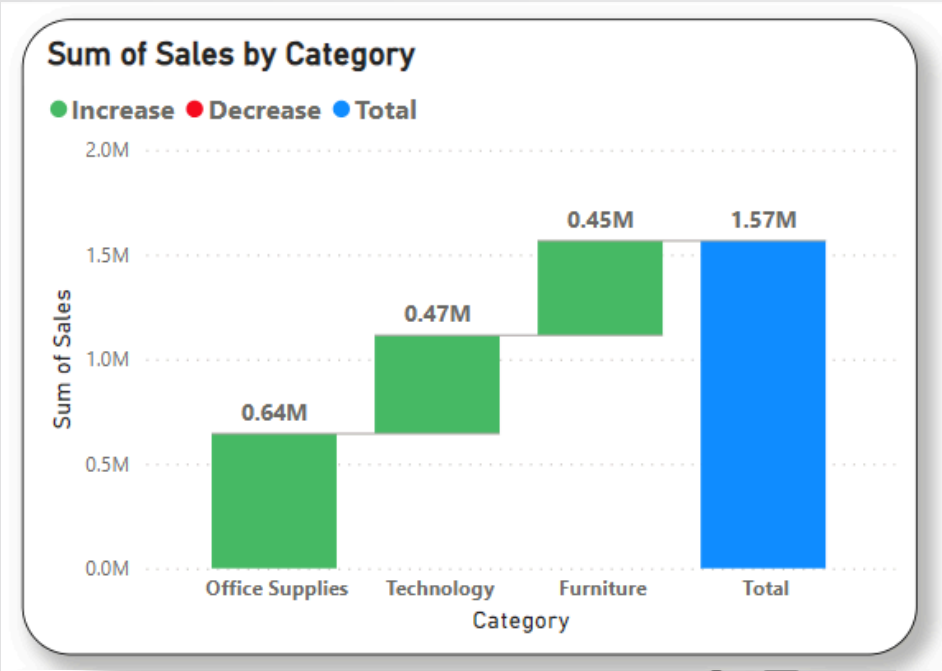
This chart helps identify which product categories contribute most to total sales, enabling targeted strategies for growth and inventory optimization.

The chart shows that Technology has the highest gross profit margin (0.19), helping prioritize investment and marketing efforts towards the most profitable category.


The graph shows that the West region generated the highest total profit, followed by the East, Central, and South regions, respectively.

DASHBOARD OVERVIEW

Sum of Sales by Sub-Category

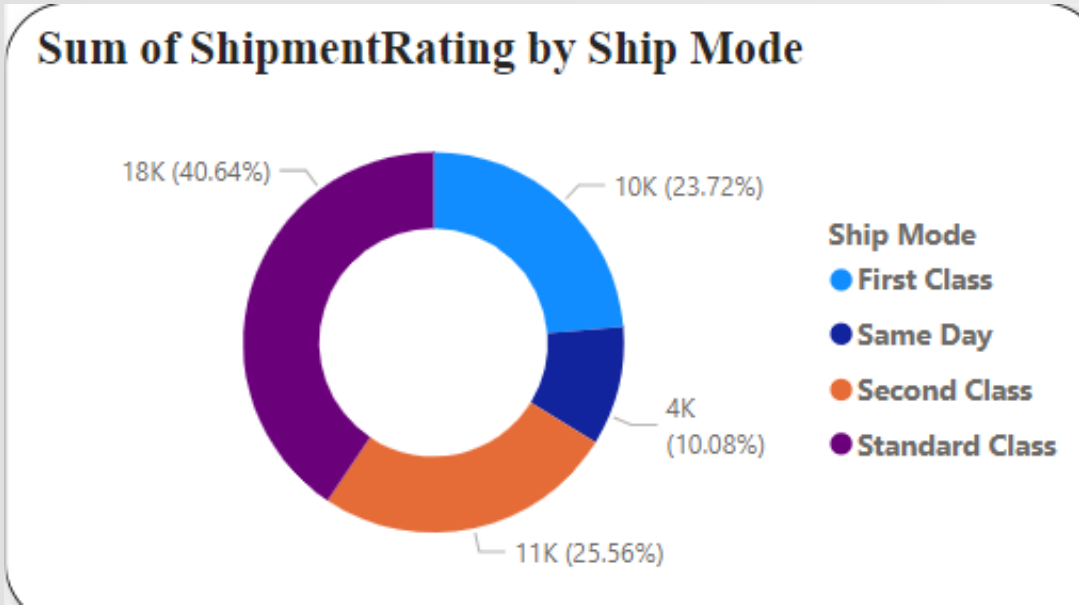|	
Phones	197K
Chairs	182K
Binders	175K
Storage	150K
Accessories	122K
Tables	119K
Paper	99K
Furnishings	93K
Machines	92K
Appliances	80K
Copiers	60K
Bookcases	58K
Art	51K
Supplies	37K
Labels	19K
Envelopes	17K
Fasteners	15K

The funnel chart helps identify the top-performing sub-categories in sales, enabling businesses to focus on high-revenue items and improve inventory and marketing strategies.


Sum of Sales by Region
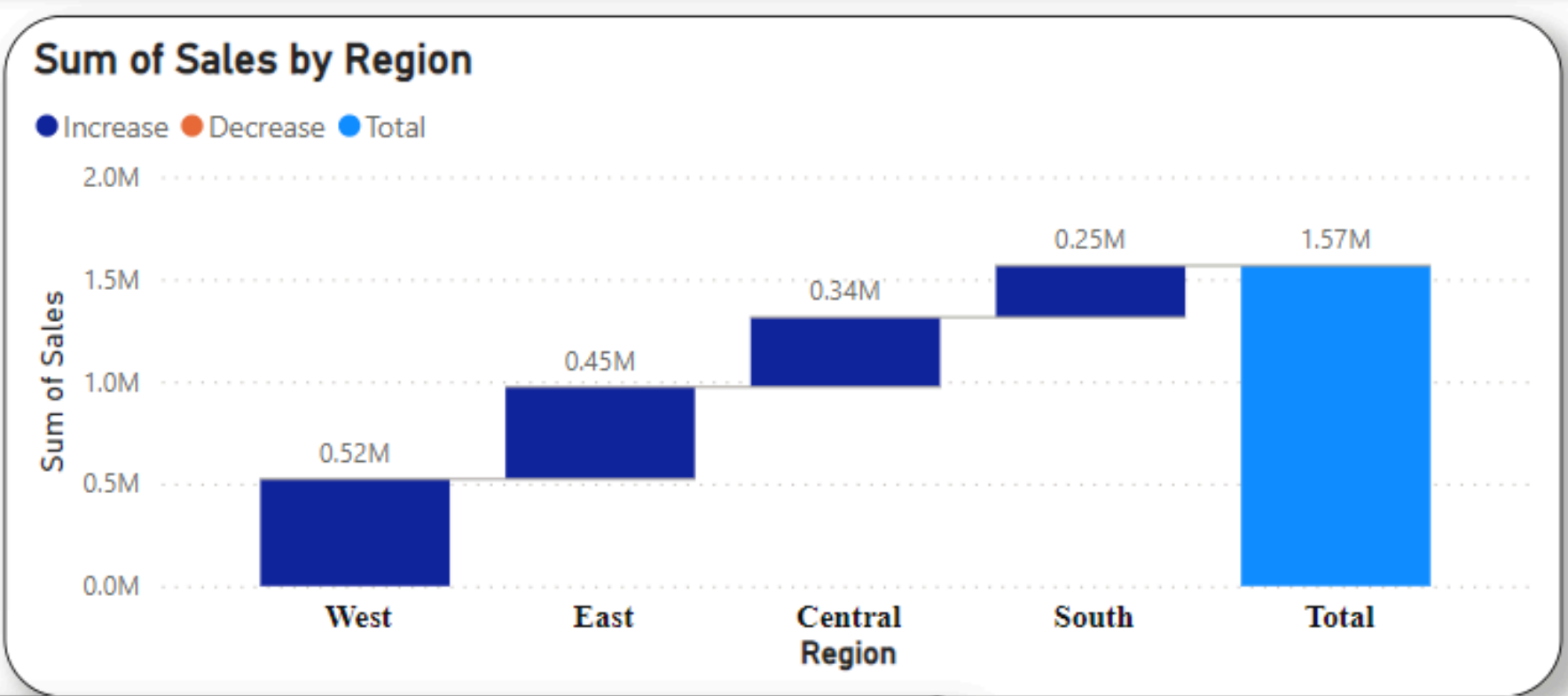
The chart provides a regional breakdown of sales, helping identify strong and weak performing areas to tailor regional sales strategies effectively.
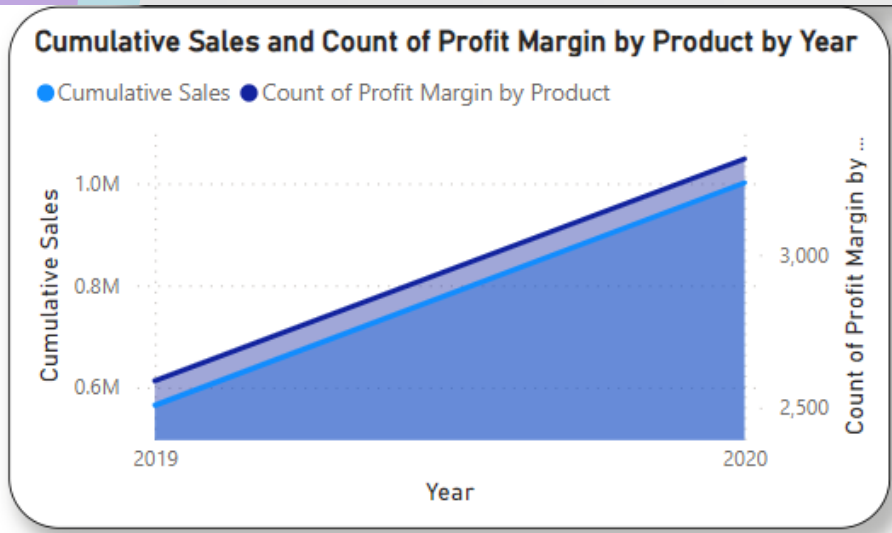
DASHBOARD OVERVIEW

Sum of ShipmentRating by Ship Mode

18K (40.64%)   10K (23.72%)

Ship Mode
● First Class
● Same Day
● Second Class
● Standard Class

4K (10.08%)

11K (25.56%)

This chart helps analyze the popularity and performance of different shipping modes, enabling optimization of logistics and customer satisfaction strategies.

Total Returns and Sum of ShipmentRating by Year and Month

● Total Returns ● Sum of ShipmentRating
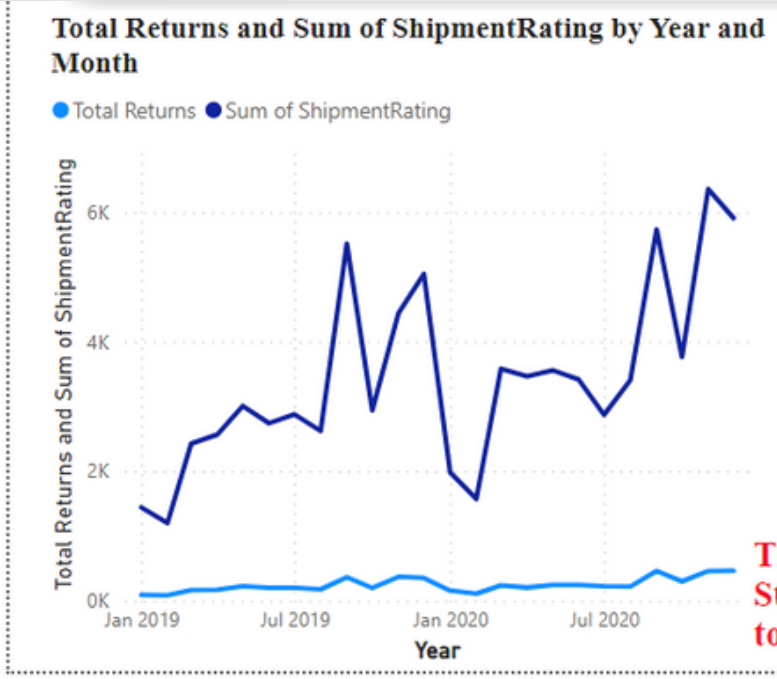
The graph provides insights into the relationship between product returns and customer satisfaction, helping to identify areas for improvement in the sales process.

Cumulative Sales and Count of Profit Margin by Product by Year

● Cumulative Sales ● Count of Profit Margin by Product

The graph shows that cumulative sales and the count of profit margin by product have both increased from 2019 to 2020, indicating overall growth in sales and profitability.
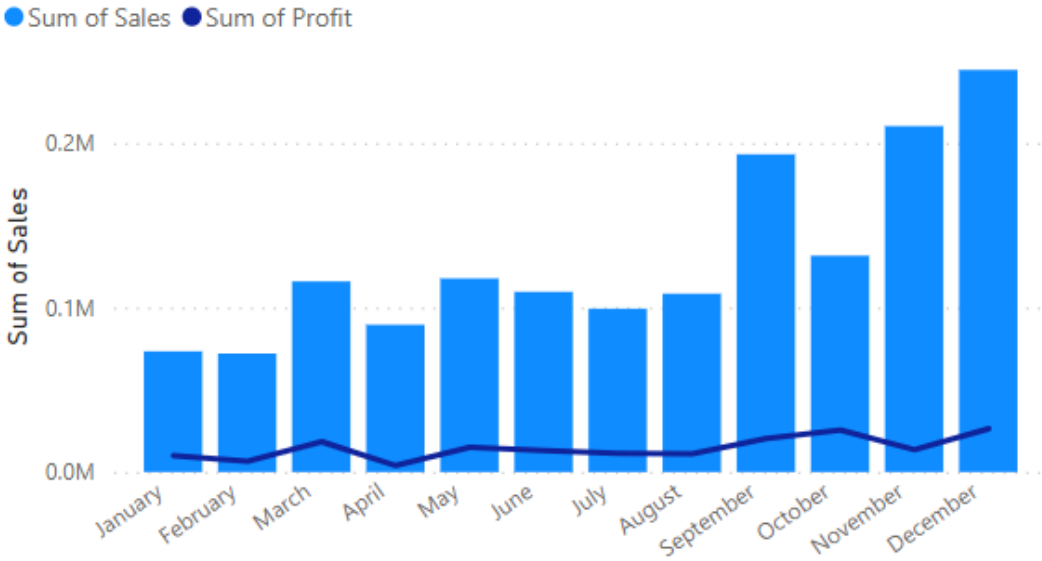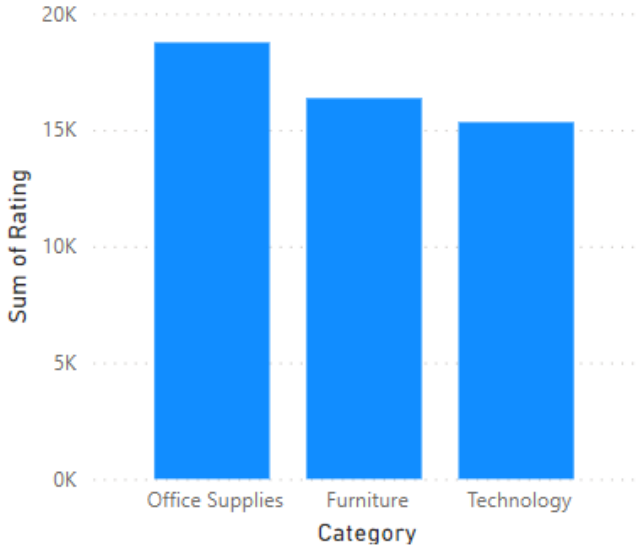
DASHBOARD OVERVIEW

Sum of Sales by Product Name
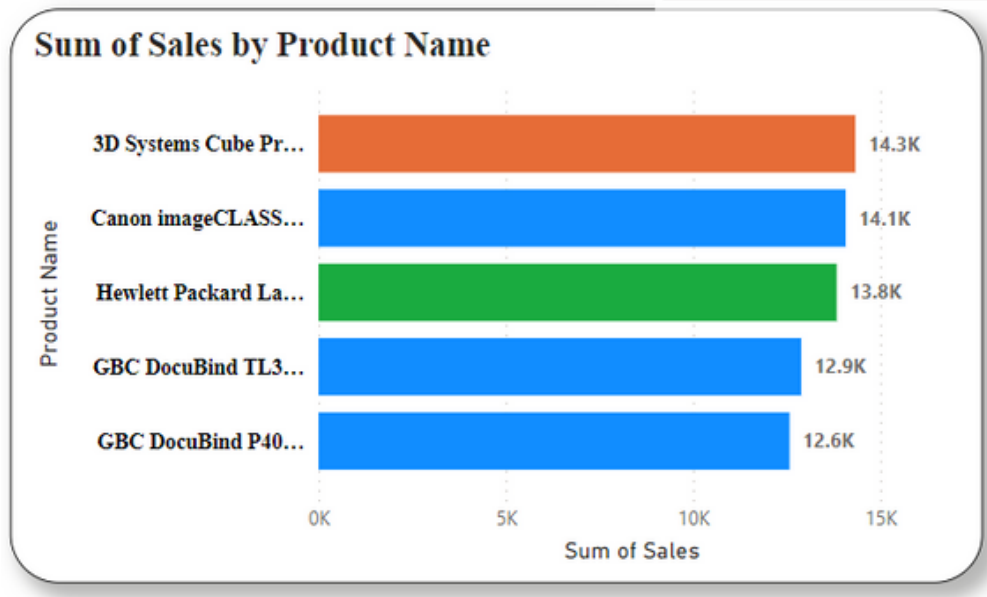
The graph shows the top-selling products, with 3D Systems Cube Pro leading in sales.

Sum of Sales and Sum of Profit by Month

● Sum of Sales ● Sum of Profit

The graph shows that sales and profit fluctuated throughout the year, with the highest sales and profit occurring in December.

Sum of Rating by Category

The graph shows that Office Supplies have the highest customer satisfaction rating, followed by Furniture and Technology.

DAX FORMULAS

1.TOTAL SALES: TOTAL SALES = SUM(SALES[SALES AMOUNT])

2. TOTAL PROFIT: TOTAL PROFIT = SUM(SALES[PROFIT])

3. PROFIT MARGIN: PROFIT MARGIN = DIVIDE([TOTAL PROFIT], [TOTAL SALES], 0)

4. AVERAGE ORDER VALUE: AVERAGE ORDER VALUE = DIVIDE([TOTAL SALES], COUNT(SALES[ORDER ID]), 0)

5. TOP SELLING PRODUCTS: TOP PRODUCTS = TOPN(5, SUMMARIZE(SALES, PRODUCTS[PRODUCT NAME], "SALES", [TOTAL SALES]), [SALES], DESC)

6. CUMULATIVE SALES: CUMULATIVE SALES =
CALCULATE(
[TOTAL SALES],
FILTER(
ALL(SALES[DATE]),
SALES[DATE] <=
MAX(SALES[DATE])
)
)

FUTURE ENHANCEMENTS

- AI Predictions: Use advanced tools to predict future sales and customer demand, helping plan better.

- Customer Groups: Create segments based on customer habits, location, or spending to focus on specific groups.

- Live Dashboards: Upgrade to show real-time data for faster and smarter decisions.

- Product Suggestions: Add features to recommend related products to increase sales.

- Smart Alerts: Set up alerts for unusual changes, like a drop in sales or low stock, to take quick action.

- Marketing Integration: Connect the dashboard with marketing tools to run campaigns automatically using data insights.

CONCLUSION

- This analysis offers valuable insights into sales and profitability trends, helping businesses prioritize resources effectively.

- By focusing on actionable recommendations, companies can improve performance in both high and low-performing regions.

- Continuous monitoring through the dashboard ensures alignment with strategic goals.

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THANK YOU