Tableau Financial Performance Dashboard Project Summary

This document outlines the development and key improvements made to the Financial Performance Dashboard in Tableau Public, transforming it into a clear, interactive, and visually appealing tool for financial analysis.

Project Goal

The primary goal of this project was to create a comprehensive and user-friendly Tableau dashboard to visualize key financial performance indicators (KPIs) and trends over time. The dashboard aims to provide quick insights into Sales, Profit, Total Revenue, Profit Margin, and COGS to Sales %.

Key Performance Indicators (KPIs)

The following KPIs were identified and incorporated into the dashboard:

- **Sales:** Total sales volume.
- **Profit:** Total profit generated.
- **Total Revenue:** Overall revenue.
- **Profit Margin:** Percentage of revenue that constitutes profit.
- **COGS to Sales %:** Cost of Goods Sold as a percentage of Sales, indicating operational efficiency.

These KPIs were strategically arranged at the top of the dashboard, following best practices for visual hierarchy, with primary metrics like Sales and Profit placed prominently.

Data Preparation and Formatting

Several crucial steps were undertaken to prepare and format the data for optimal visualization:

1. **Converting Large Values to Millions (M):**
    - To make large financial figures more readable, a custom number format was applied to the KPI values.
    - The format #,,"M" was used to display values in millions (e.g., 18,448,000 became 18M). This involved using two commas before the "M" suffix in the custom format setting to divide the number by one million.
2. **Converting Date Column from Text to Date Type:**
    - Initially, the 'Date' column was identified as a text data type by Tableau, preventing proper time-series analysis.
    - The data type was changed from 'Text' (Abc icon) to 'Date' (calendar icon) by

right-clicking the field in the 'Tables' pane and selecting Change Data Type > Date.

3. **Setting X-Axis to Month-wise:**
    - After converting the 'Date' column to the correct data type, the x-axis for time-series charts was configured to display data on a month-by-month basis.
    - This was achieved by right-clicking the 'Date' pill on the Columns shelf and selecting the 'Month' option (preferably the continuous 'Month' for line charts).

Dashboard Layout and Aesthetics

Significant effort was put into improving the visual appeal and organization of the dashboard:

1. **Overall Layout and Spacing:**
    - The dashboard was structured using containers to ensure proper alignment and responsiveness.
    - White space was strategically added between elements to reduce clutter and improve readability.
2. **KPI Section Enhancement:**
    - Vertical divider lines were added between each KPI box using thin Blank objects with a background color, creating a clean, card-like appearance for each metric.
    - All KPI text boxes were ensured to have uniform sizing for visual harmony.
    - Consistent icons were maintained, aligned perfectly with their respective text.
3. **Color Palette and Fonts:**
    - A cohesive color scheme was applied across the entire dashboard, using warm tones (yellow and orange) to create a unified and branded look.
    - Fonts were standardized for all titles, labels, and text, with the main dashboard title being larger and bolder for prominence. Chart titles were made consistent in size and style.
4. **Chart-Specific Formatting:**
    - Borders around individual charts were removed to create a seamless flow.
    - Unnecessary axis titles were removed for cleaner visuals where the context was already clear from the chart title.

Interactivity and User Experience

To enhance the dashboard's utility and user experience, interactive elements were incorporated:

1. **Applying Filters to All Charts:**
    - A key filter (e.g., 'Segment', 'Country', 'Products') was configured to apply across all relevant worksheets on the dashboard.
    - This was done by selecting the filter on the dashboard, clicking the dropdown arrow, hovering over Apply to Worksheets, and choosing All Using This Data Source (or Selected Worksheets... for specific control).
2. **Adding Color Legends:**
    - Color legends (e.g., for 'Segment' and 'Product') were added to the dashboard. These legends provide immediate context for the colors used in the charts, making the visualizations easily understandable.
3. **Reducing Tooltip Size:**
    - The size of the data highlight (tooltip) was reduced to be less intrusive. This was achieved by navigating to the specific worksheet, clicking the 'Tooltip' button on the 'Marks' card, and reducing the font size within the tooltip editor.

Conclusion

The Tableau Financial Performance Dashboard has been significantly enhanced through meticulous data preparation, thoughtful layout design, and the integration of interactive features. It now serves as a robust and visually appealing tool for monitoring key financial performance, allowing users to quickly grasp insights and explore data effectively.

Should you wish to explore further enhancements, we could consider:

- Adding more advanced calculations or trend analysis.
- Implementing drill-down capabilities for deeper data exploration.
- Exploring different chart types for specific insights.