User Requirements Doc:

Coffee Shop Sales Analysis Dashboard

# Objective

To discover the month-to-month performance of the coffee shop to see if they are meeting their month-to-month goals or not and find their top 10 selling products.

# Problems identified

* The coffee shop has some goals it would like to reach on a month-to-month basis to hit their yearly goals. They need a dashboard that will show them their progress thus far and if there is some improvement they need to make to still reach their yearly goals. Main problem: unable to track their month-to-month progress effectively.

# Problem Statement

**KPI’S REQUIREMENTS**

## 1. Total Sales Analysis

* Calculate the total sales for each month respective month.
* Determine the month to month increase or decrease in sales.
* Calculate the difference in sales between the selected month and the previous month.

## 2. Total Orders Analysis

* Calculate the total number of orders for each respective month.
* Determine the month to month increase or decrease in the number of orders.
* Calculate the difference in the number of orders between the selected month and the previous month.

## 3. Total Quantity Sold Analysis

* Calculate the total quantity sold for each respective month.
* Determine the month to month increase or decrease in the total quantity sold.
* Calculate the difference in the total quantity sold between the selected month and the previous month.

**CHARTS REQUIREMENTS**

## Calendar Heat Map

* Implement a calendar heat map that dynamically adjusts based on the selected month from the slicer.
* Each day on the calendar will be color-coded to represent sales volume, with darker shades indicating higher sales volume.
* Implement tooltips to display detailed metrics (Sales, Orders, Quantity ) when hovering over a specific day.

## Sales Analysis by Weekdays and Weekends

* Segment sales data into weekdays and weekends to analyse performance variations.
* Provide insights into whether sales patterns differ significantly between weekdays and weekends.

## 3. Sales Analysis by Store Location

* Visualise sales data by different store locations.
* Include month-over-month difference metrics based on the selected month in the slicer.
* Highlight MoM sales increase or decrease for each store location to identify trends.

## 4. Daily Sales Analysis with Average Line

* Display daily sales for the selected month with line chart.
* Incorporate an average line on the chart to represent the average daily sales.
* Highlight bars exceeding or falling below the average sales to identify exceptional sales days.

## 5. Sales Analysis by Product Category

* Analyse sales performance across different product categories.
* Provide insights into which product categories contribute the most to overall sales.

## 6. Top 10 Products by Sales

* Identify and display the top 10 products based on sales volume.
* Allow users to quickly visualise the best-performing products in terms of sales.

## 7. Sales Analysis by Days and Hours

* Utilize a heat map to visualise sales patterns by days and hours.
* Implement tooltips to display detailed metrics (Sales, Orders, Quantity) when hovering over a specific day-hour.

# Success criteria

The shop owner can

* Easily identify the top performing products in his store and be able to utilise that knowledge and find out why they are popular.
* Assess the month-to-month changes and be able to clearly see if they will be able to reach their yearly goal or need to implement a new strategy.
* Make informed decisions to advance with based on recommendations.

This allows the coffee shop to achieve a good strategy to reach their month-to-month and yearly goals for the shop and get to understand which products their customers prefer to have on what time of the day and also on which day or weekend, which leads to reaching their goals faster and easier and also having a better relationship with their customers as they will be able to provide what they need based on the analysis.