GOKUL
SARAVANAN

Sales Performance Analysis

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Searching & Filtering Data

Filter the dataset to find all orders placed in the "South" region for the "Electronics" category within the last year.

Use Filter buttons (or Advanced Filter).

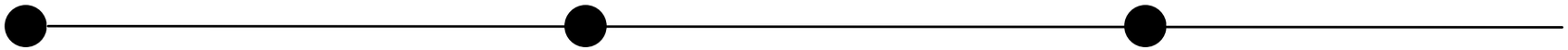
Set Region='South', Category='Electronics'.

Use date filter: Order Date >= [last year’s date].

MS Excel

Data Cleaning with Text Functions

Use TRIM, UPPER, LOWER to standardize “Region” and “Product Category” columns.



=TRIM(A2)

=UPPER(A2)

=LOWER(A2)

MS Excel

Merging Regional Average Sales

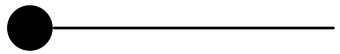
Calculate average sales for each region and merge into dataset.

=AVERAGEIF($A$2:$A$100, A2, $B$2:$B$100)

MS Excel

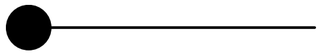
Excel Summary Statistics

a. Total Sales by Region:



=SUMIF(A:A, "South", B:B)

b. Average Discount & Profit for Furniture



=AVERAGEIF(C:C, "Furniture", D:D) (Discount)
=AVERAGEIF(C:C, "Furniture", E:E) (Profit)

MS Excel

Pivot Table Summary

Create Pivot Table summarizing total sales & profit by region and product category.

Insert Pivot Table

Rows: Region, Product Category

Values: Sum of Sales, Sum of Profit

Add slicers for dynamic filtering

MS Excel

Bar Chart

Total Sales by Region

Highlight Region & Sales columns.

Insert > Bar Chart (Clustered Bar).

Each bar shows total sales for a region

MS Excel

Pie Char

Category Contribution

Highlight Product Category & Sales columns.

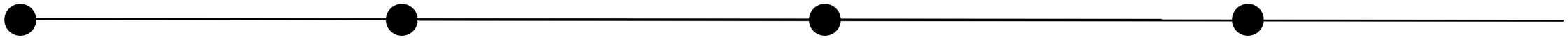
Insert > Pie Chart.

Each slice shows category share of total sales

MS Excel

Regression Analysis (Discount vs Sales)

Understand if discount percentage impacts sales amount



Select Discount % and Sales columns.

Insert > Scatter Plot.

Click chart, Add Trendline.

Select “Display Equation” and “Show R^2.”

MS Excel

Stacked Bar Chart

Compare sales by region, segmented by product category.

In PivotTable or data summary, organize by Region and Category.

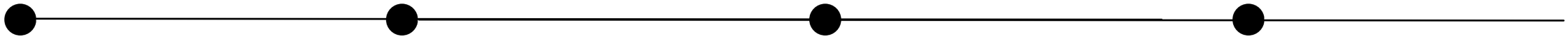
Insert > Stacked Bar Chart.

Each bar = Region; each segment = Category’s share of that region’s sales.

MS Excel

Basic Dashboard

Create interactive report/showcase



Key Metrics: Total Sales (=SUM(Sales)), Total Profit, Highest-Selling Category (=INDEX/ MATCH/ MAX formulas).

Slicers/Dropdowns: Add slicers to Pivot Tables/graphs for filtering.

Visuals: Include summary charts, tables.

Layout: Use separate worksheet/tab; organize sections with clear labels

MS Excel

Conditional Formatting

Highlight orders with profit margin >50%.

Calculate profit margin:
=Profit / Sales
Format column as percent.

Home > Conditional Formatting > New Rule > Use formula:
=C2>0.5 (if margin is in column C)

Set desired highlighting (fill, font, border).

MS Excel

BASED ON MY SALES ANALYSIS

Recommendations to Improve Profit

Focus on High-Margin Products

Prioritize and promote products and categories that consistently deliver strong profit margins. Consider bundling or upselling these items.

Target Top-Performing Regions

Invest in regions showing high sales and profit potential. Allocate marketing resources and promotional efforts where the data reveals the biggest returns.

Optimize Discount Strategies

Analyze the impact of discounts on sales. Offer discounts strategically to boost sales volume without sacrificing overall profitability. Avoid excessive discounting in categories where it doesn't lead to higher profit

Reduce Low-Performing Inventory

Identify products and categories with low sales or margins. Adjust inventory levels, discontinue low performers, or negotiate better supplier terms.

Enhance Data-Driven Decision Making

Continuously monitor key metrics through dashboards. Use regular reports and visualizations to make timely, informed decisions.

Leverage Targeted Marketing

Tailor campaigns by region and product category, using insights from your analysis to reach the right customers with the right offers.

Improve Operational Efficiency

Streamline order processing, manage costs, and eliminate inefficiencies that hurt profit margins.

Marketing

Focus on more digital marketing and run more offline campain to reach new set customers

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Thank you!