

B&J Dashboard Requirements

Project Overview:

We need a dashboard that includes the following key metrics and visualizations:

1. Revenue Distribution:

- By product price category (high-priced vs. low-priced). (Low ≥ 10 ,

High < 10)

- By age group and gender.
- By payment method.

2. Profitability Analysis:

- Most profitable brand, location, customer, and salesperson.
- Overall profit margin.

3. Customer Insights:

- Top 5 customers by revenue contribution.
- Total number of customers acquired.

4. Geographic Revenue Distribution:

- Revenue share across key geographic locations.

5. Sales Performance:

- Metrics such as quantity sold, total revenue, total cost of goods sold

(COGS), and total profit.

Specific Requirements:

- preferred tool or platform: Excel
- Design Preferences: We would like the dashboard to be user-friendly, visually appealing, and interactive, with filters for location, payment method, and age group.

Goals of the Dashboard:

- Enable quick and informed decision-making by providing key business insights at a glance.
- Identify profitable segments and customer demographics to optimize marketing and sales strategies.
- Monitor sales performance and track customer acquisition.

Dashboard 2

Project Overview:

The dashboard should include the following components:

1. Revenue Analysis:

- Revenue by Values: Display total revenue in absolute terms across different categories, such as by product, location, and customer segment.
- Revenue by Percentage: Include percentage contributions to total revenue from various segments, such as product lines, age groups, and

geographic regions.

2. Change Analysis:

- Quarter-over-Quarter (QoQ) Change: Visualize quarterly revenue changes, highlighting percentage increases or decreases to identify trends.
- Month-over-Month (MoM) Change: Present monthly revenue changes, with annotations to explain significant fluctuations (e.g., promotional campaigns, market shifts).
- Week-over-Week (WoW) Change: Provide weekly revenue changes, with specific attention to the performance of different weekdays and weekends.

3. Key Performance Indicators (KPIs):

- High-Level Metrics: Display key financial KPIs such as Quantity Sold, Total COGS, Total Revenue, Total Profit, and Profit Margin.
- Profitability Insights: Highlight the most profitable brand, location, customer, and age group.

4. Interactive Features:

- Toggle Between Revenue Views: Allow users to switch between viewing data by revenue values and by percentage contributions easily.
- Dynamic Filters: Implement filters for locations and payment methods (e.g., Cash, Credit Card, Debit Card, Mobile Payment) to enable

customized views of the data.

5. Additional Insights:

- Annotations for Significant Changes: Include the ability to annotate data points in the MoM and WoW change charts to explain key events or anomalies in the data.

- Comparison Between Weekdays and Weekends: Analyze and compare revenue contributions from weekdays versus weekends.

Specific Requirement:

- Design Preferences: The dashboard should be visually engaging, user-friendly, and include both numeric and percentage-based views to cater to different analytical needs.

Goals for the Dashboard:

- Comprehensive Analysis: Provide a holistic view of our revenue performance, both in absolute terms and as a percentage of the total.

- Trend Identification: Quickly identify trends and anomalies in revenue changes, enabling swift business responses.

- Performance Monitoring: Regularly track key metrics to monitor business health and identify areas for strategic focus.