Financial Performance Dashboard – Project Report

1. Title Page

Project Title: Financial Performance Dashboard
Domain: Business Analyst
Tool Used: Tableau Desktop
Dataset Type: Financial Dataset (Sales, Profit, COGS, Discounts)
Project Level: Intermediate

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2. Abstract

This project focuses on analyzing the financial performance of a business across different countries, products, segments, and time periods using Tableau. The dashboard provides insights into key financial metrics such as sales, profit, gross sales, discounts, and cost of goods sold (COGS). Interactive visualizations enable stakeholders to monitor performance trends, evaluate profitability, and understand the impact of discounts on revenue. The final output is a comprehensive Financial Performance Dashboard that supports data-driven business decision-making.

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3. Introduction

Financial analysis is a critical function for organizations to understand business health and profitability. With increasing volumes of financial data, visualization tools like Tableau help convert raw data into meaningful insights. This project applies business analytics techniques to explore financial data and present insights through interactive dashboards.

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4. Problem Statement

The organization generates financial data across multiple countries, products, and customer segments. However, analyzing sales trends, profitability, and discount impacts using raw data is complex and time-consuming. There is a need for a centralized, interactive dashboard that provides a clear overview of financial performance and supports strategic decision-making.

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5. Objectives of the Project

- To analyze sales and profit across different countries and segments
- To understand financial trends over time
- To evaluate the impact of discounts on revenue and profitability
- To identify high-performing products and regions
- To build an interactive financial performance dashboard using Tableau

6. Dataset Description

The dataset used in this project contains the following columns:

- Segment
- Country
- Product
- Discount Band
- Units Sold
- Manufacturing Price
- Sale Price
- Gross Sales
- Discounts
- Sales
- COGS (Cost of Goods Sold)
- Profit
- Date
- Month Number
- Month Name
- Year

The dataset was imported into Tableau and verified for correct data types and consistency.

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7. Tools and Technologies Used

- **Data Visualization Tool:** Tableau Desktop
- **Dataset Format:** Excel / CSV
- **Domain Knowledge:** Business Analytics, Financial Analysis

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8. Methodology

8.1 Data Import and Preparation

- Connected the financial dataset to Tableau Desktop
- Verified date, numerical, and categorical data types
- Checked for missing or inconsistent values
- Prepared data for analysis and visualization

8.2 Calculated Fields Created

The following calculated fields were created to support analysis:

- **Profit Margin:** SUM(Profit) / SUM(Sales)
- **Total Discounts:** SUM(Discounts)
- **Total Revenue:** SUM(Gross Sales)
- **COGS to Sales Ratio:** SUM(COGS) / SUM(Sales)
- **Discount Impact:** SUM(Discounts) / SUM(Gross Sales)

9. Visualizations Created

9.1 Sales and Profit by Country (Bar Chart)

This visualization compares total sales across countries, with color encoding used to represent profit levels.

9.2 Sales and Profit Trend Over Time (Line Chart)

Displays year-wise and month-wise trends for sales and profit, helping identify growth patterns and seasonality.

9.3 Gross Sales vs Discounts (Scatter Plot)

Illustrates the relationship between discounts and gross sales to understand how discounting strategies affect revenue.

9.4 Sales by Product and Discount Band (Heat Map)

Shows how different discount bands impact product sales performance.

10. Dashboard Design and Interactivity

- Combined all visualizations into a single Financial Performance Dashboard
- Added interactive filters for:
- Date
- Country
- Segment
- Discount Band
- Enabled dynamic exploration of financial metrics
- Applied professional formatting, labels, and tooltips

11. Key Insights and Findings

- Certain countries contribute significantly more to total sales and profit
- Higher discounts increase sales volume but may reduce profit margins
- Some products perform better under specific discount bands
- Sales and profit show seasonal patterns across months and years

12. Conclusion

The Financial Performance Dashboard successfully provides a comprehensive overview of business financial metrics. By leveraging Tableau's interactive capabilities, the project enables users to analyze trends, profitability, and discount effectiveness efficiently. This dashboard supports better financial planning and strategic decision-making.

13. Future Scope

- Integration of real-time financial data
- Advanced forecasting using predictive analytics
- Inclusion of additional KPIs such as targets and variance analysis
- Deployment on Tableau Public or Tableau Server

14. Appendix

- Tableau Workbook (.twb / .twbx)
- Financial Dataset (Excel / CSV)
- Project Manual (PDF)

15. References

- Tableau Official Documentation
- Financial Performance Dashboard Project Manual
- Business Analytics Learning Resources