Data-Driven Storytelling Presentation:

ACCOUNT PERFORMANCE METRICS AND SALES TREND

BY

Prajan K

CHASE

J.P.Morgan

INTRODUCTION

Problem Statement

- J.P. Morgan Chase & Co. is a leading global financial services firm that offers services and operates worldwide.
- The company aims to analyze the account performance metrics over the last 5 years (2017-2021) and the factors contributing to its compound annual growth rate (CAGR) in unit sales. This includes identifying opportunities for further improvement.

Business Questions

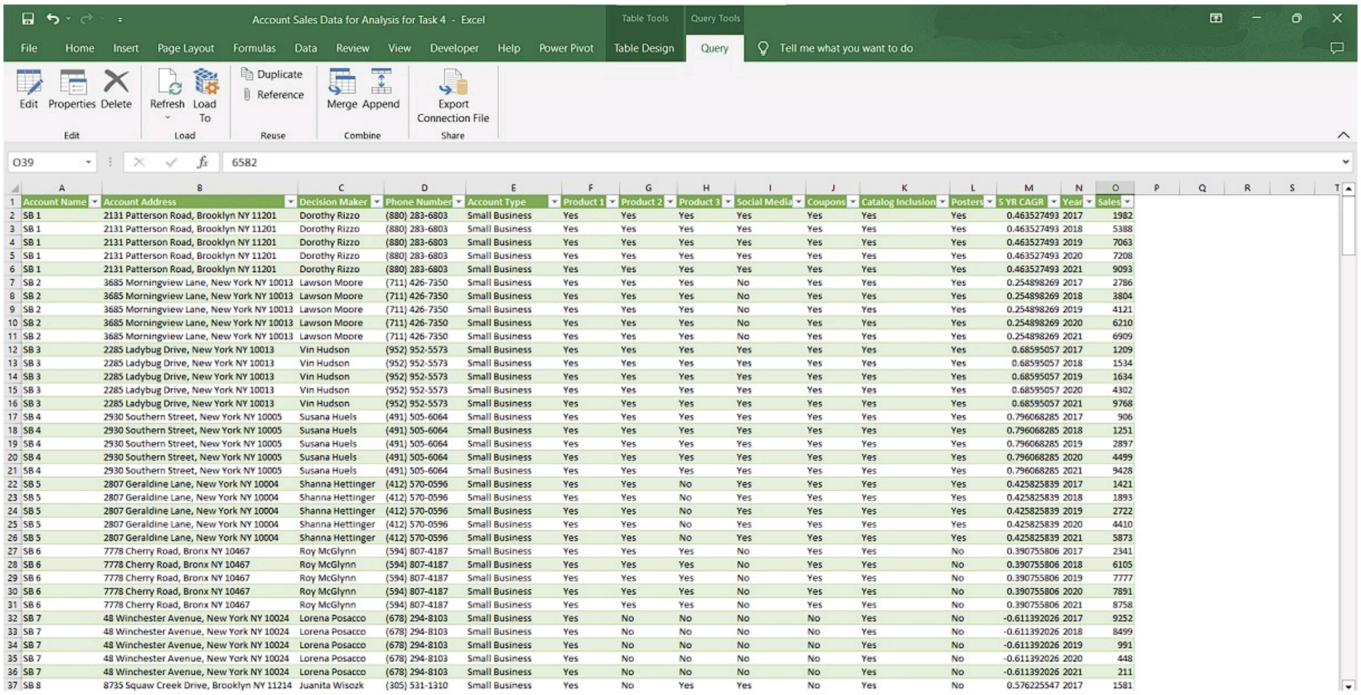
- Examining the total unit sales for each year.
- Analyzing the year-over-year growth in sales.
- Identifying which account types are surpassing others in terms of unit sales.
- Calculating the average 5-year compound annual growth rate (CAGR) based on different account types.
- Evaluating the top-performing and bottom-performing accounts.

CHASE

J.P.Morgan

DATA MODELLING

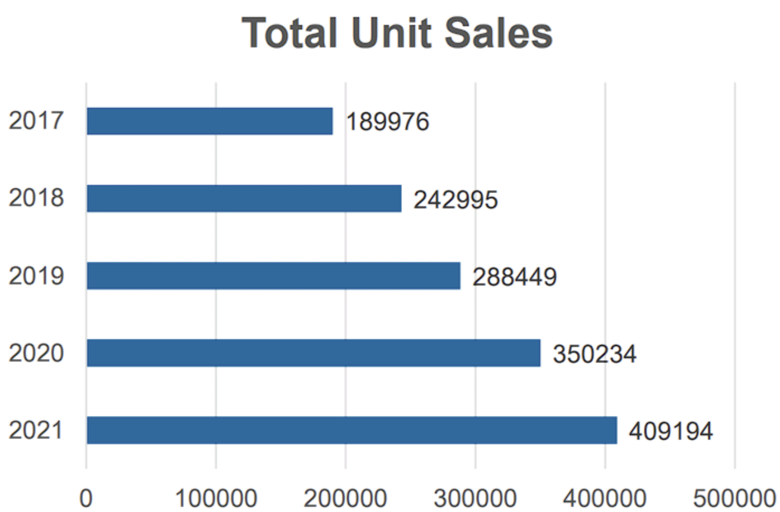
Utilizing Power Query in **MS-Excel**, transformed the data for improved organization, giving a more structured foundation for necessary analysis.



Account Name	Account Address	Decision Maker	Phone Number	Account Type	Product 1	Product 2	Product 3	Social Media	Coupons	Catalog Inclusion	Posters	5 YR CAGR	Year	Sales
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.463527493	2017	1982
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.463527493	2018	5388
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.463527493	2019	7063
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.463527493	2020	7208
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.463527493	2021	9093
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	0.254898269	2017	2786
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	0.254898269	2018	3804
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	0.254898269	2019	4121
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	0.254898269	2020	6210
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	0.254898269	2021	6909
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.68595057	2017	1209
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.68595057	2018	1534
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.68595057	2019	1634
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.68595057	2020	4302
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.68595057	2021	9768
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2017	906
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2018	1251
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2019	2897
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2020	4499
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	0.796068285	2021	9428
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	0.425825839	2017	1421
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	0.425825839	2018	1893
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	0.425825839	2019	2722
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	0.425825839	2020	4410
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	0.425825839	2021	5873
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	0.390755806	2017	2341
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	0.390755806	2018	6105
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	0.390755806	2019	7777
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	0.390755806	2020	7891
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	0.390755806	2021	8758
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	-0.611392026	2017	9252
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	-0.611392026	2018	8499
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	-0.611392026	2019	991
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	-0.611392026	2020	448
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	-0.611392026	2021	211
SB 8	8735 Squaw Creek Drive, Brooklyn NY 11214	Juanita Wisozk	(305) 531-1310	Small Business	Yes	No	Yes	Yes	No	Yes	No	0.576225547	2017	1581

DATA ANALYSIS & VISUALIZATION

Overall, our unit sales growth has been good, with a 5- year CAGR of **21%**

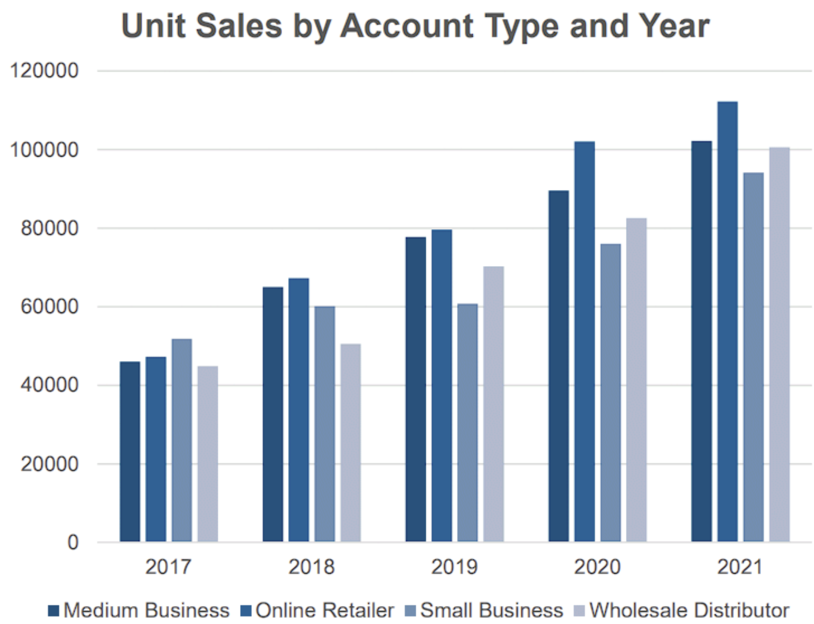


CHASE

J.P.Morgan

DATA ANALYSIS & VISUALIZATION

Directing our sales resources and adjusting our sales mix towards **online retailer accounts** could lead to enhanced sales growth.

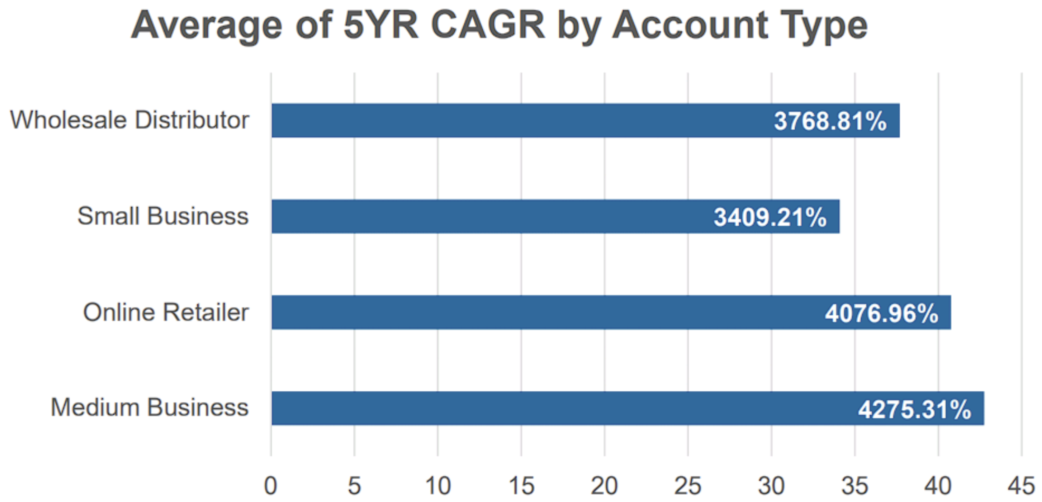


CHASE

J.P.Morgan

DATA ANALYSIS & VISUALIZATION

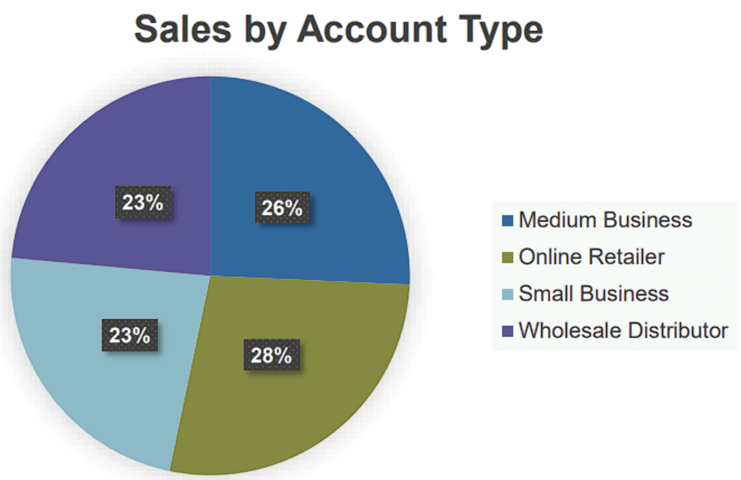
However, **Medium Business** account type is experiencing higher profitability driven by the average 5-year CAGR.



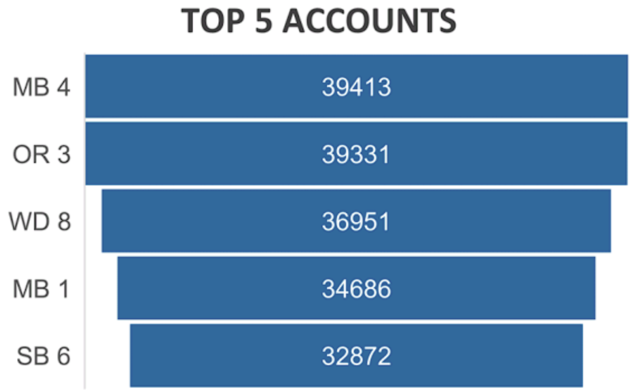
DATA ANALYSIS & VISUALIZATION

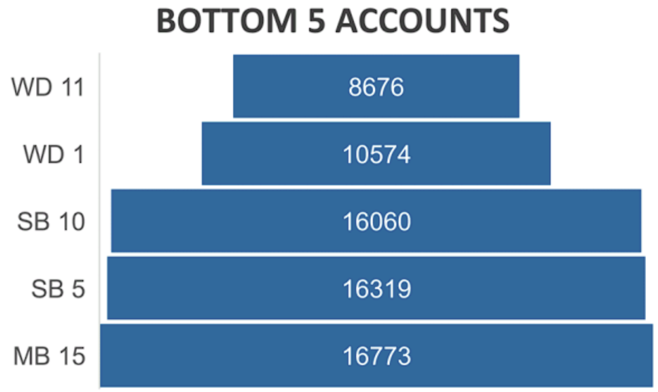
Online Retailer generated the highest sales volume, totaling **408,515 units**, which accounts for **28%** of the total sales volume.

Medium Business followed closely with a sales volume of **380,568 units**, making up **26%** of the total sales volume.



DATA ANALYSIS & VISUALIZATION





The account name **MB4** proved to be the **highest**-performing account, achieving an impressive sales volume of approximately **39,413 units**.

On the other hand, accounts **WD11**, **WD1**, and **SB10** performed at the **lowest** level in terms of sales volume. Specifically, WD11 accounted for 8,676 units, WD1 for 10,574 units, and SB10 for 16,060 units, all in terms of sales volume

CHASE

J.P.Morgan

SUMMARY

- Despite satisfactory overall sales performance, there is ample room for significant improvement.
- Discontinuing poorly performing accounts would free up valuable sales and marketing resources.
- Notably, the past five years have witnessed the most robust sales growth in the online retailer account category.
- By reallocating the resources saved from closing underperforming accounts to online retailer accounts, sales growth could be maximized.
- It is advisable to promptly close these underperforming accounts and launch an initiative to identify high-potential online retailer accounts deserving of increased sales and marketing focus.