Sales KPI Dashboard – Excel Project

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Project Overview

1 Dynamic KPI dashboard with quarter switching

2 Covers Revenue, Customers, CAC & Target achievement

3 Includes previous year comparison

4 Built fully in Microsoft Excel

Problem Statement

Management needs a single consolidated KPI view

Quarter-wise performance analysis

Actual vs Target tracking

Customer & CAC performance monitoring

Data Preparation

01

Synthetic dataset prepared for 4 quarters

02

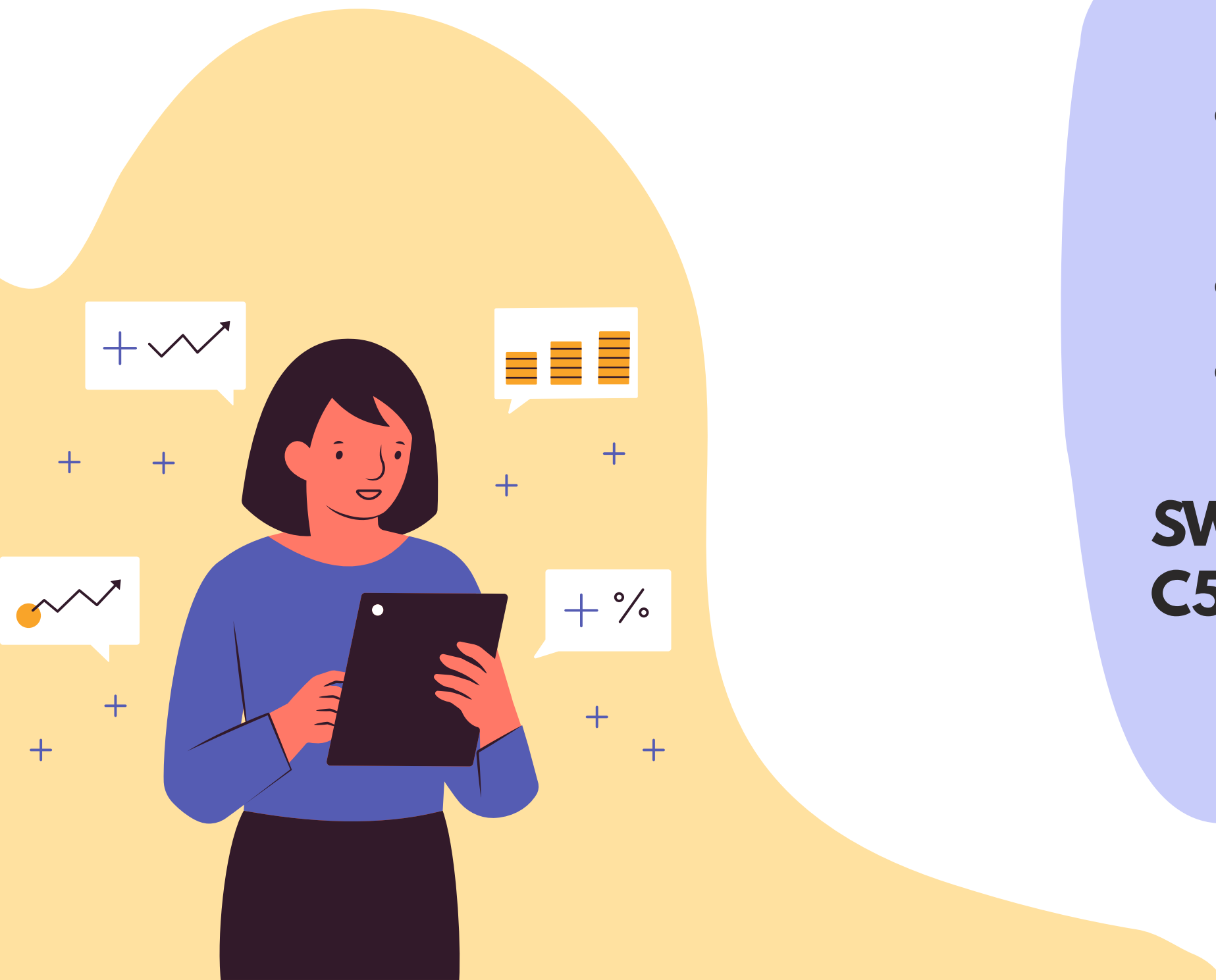Revenue, Targets, Customers, CAC values

03

Employee-wise monthly breakdown

04

Used SUM, SWITCH, and data validation dropdown

Quarter Switching Logic

- Quarter selected using Data Validation dropdown
- Active Table updates automatically
- Key formula used

SWITCH(E5,H1,C30,H2,C41,H3,C52,H4,C63)

KPI Calculations

- **Total Revenue per Year = SUM of all quarter totals**
- **Total Customers per Year = SUM of all months**
- **Revenue per Customer = Revenue / Customers**
- **Target Achievement = Actual / Target**

Dashboard Overview

KPI Overview	Q1 2024

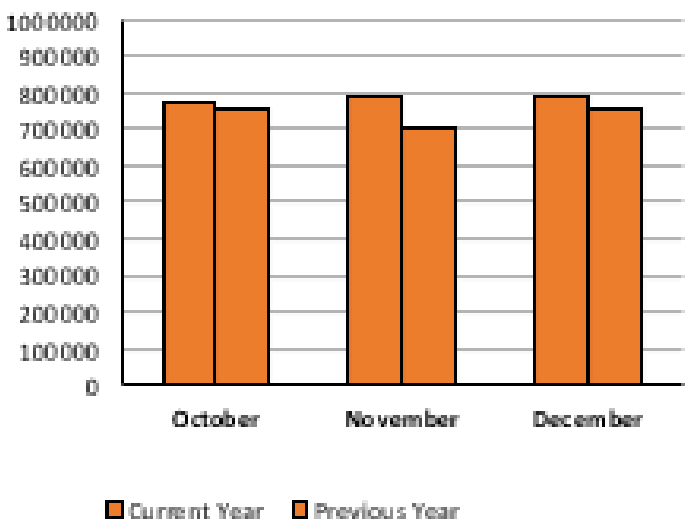## Revenue Compared per year

Revenue Actual VS Target

$23,46,500 — Actual Revenue

$22,00,000 — Target Revenue

107% — Target Achievement

Revenue compared to previous year (October, November, December — Current Year, Previous Year)
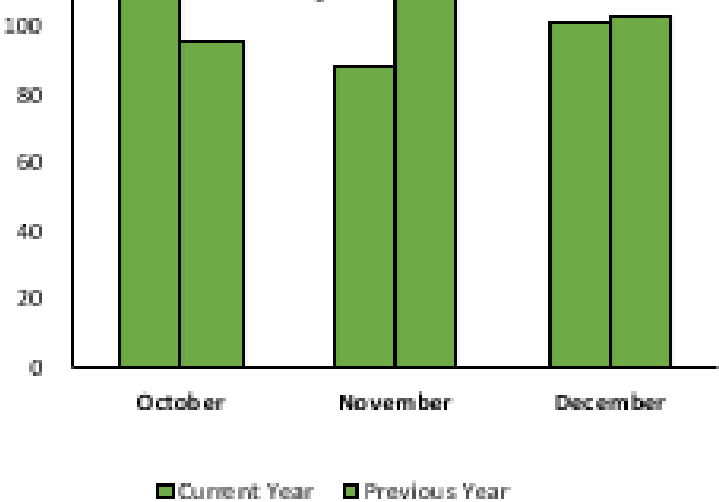
New Customers per year

New customers Actual VS Target

$307 — Actual New Customers

$350 — Target New Customers

88% — Target Achievement

New Cumstomers compared to previous (October, November, December — Current Year, Previous Year)
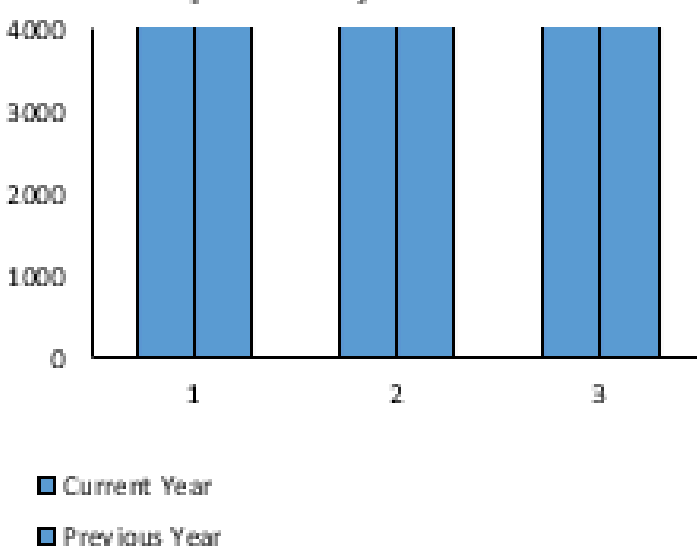
Average Revenue Per Year

Avg. Revenue per Customer

$12,157 — Actual Revenue Per Customer

$12,500 — Target Revnue Per Customer

97% — Target Achievement

Average Revenue Per Cust. compared to previous year (Current Year, Previous Year)
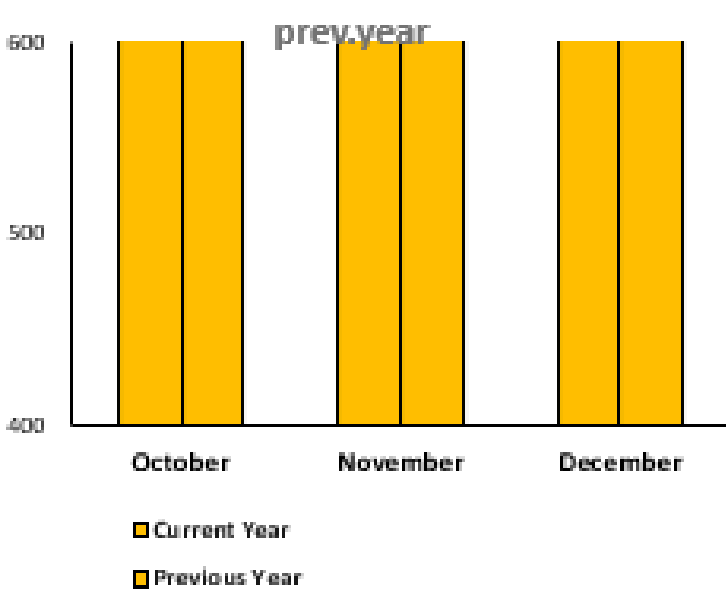
Customer Acquisition costs per year

Customer Acquisition Cost

$2,192 — Actual CAC

$1,750 — Target CAC

125% — Target Achievement

Customer Acquisition costs comp. to prev.year (October, November, December — Current Year, Previous Year)

Key Insights

01 –Revenue achieved 107% of target in Q1

02 –New customer acquisition reached 88% of goal

03 –CAC is above the target – improvement needed

04 –Revenue per customer near target value

Conclusion

- Dashboard offers quick business insights
- Supports decision-making with clear visuals
- Dynamic and interactive via dropdown
- Can be expanded to more KPIs or more years