Reflection Paper: Sales Dashboard Design and Insights

1. What was the primary purpose of this dashboard?

The main purpose was to provide a comprehensive view of business performance across sales, profit, customer segments, regions, and shipping methods. I wanted to give leadership a quick, insightful snapshot that could inform both strategic decisions and daily operations. The dashboard needed to balance clarity with depth, showing not just what was happening, but where and why.

2. Who were the key stakeholders, and how did each use the dashboard?

Understanding stakeholder needs helped me shape the dashboard design:

- **Executive Leadership** used it for high-level snapshots of revenue and profit to inform strategic decisions.
- **Regional Sales Managers** analyzed performance across Central, East, West, and South regions to identify strengths and gaps.
- **Product Managers** tracked top-performing categories and used the data to optimize product lines and inventory.
- **The Marketing Team** examined time trends and segment performance to allocate campaign resources effectively, especially around seasonal spikes.

3. What key performance indicators (KPIs) were tracked, and why were they important?

The KPIs acted as a health check for the business:

- **Total Sales**: $2.3M
- **Profit**: $286.3K
- **Units Sold**: 37.9K
- **Discounts**: ~$1.6K

These high-level metrics were paired with deeper insights like:

- **Regional sales** to compare territory performance.
- **Sales by category**, revealing that Technology led with $840K and 50.8% of profits.
- **Sales by month** highlighted peaks in May, October, and December.
- **Shipping modes**, with Standard Class used in 59% + of orders.

- **Segment-wise performance**, showing Home Office customers made up over half of the total sales.
- **Profitability scatter plots**, identifying low-margin high-volume items and high-profit outliers.

These KPIs guided daily decisions and long-term planning.

4. What were the most actionable insights discovered through this dashboard?

Some of the most impactful insights included:

- **Technology** is both our top-selling and most profitable category, worth prioritizing.
- **Home Office** buyers are our biggest segment, ideal for loyalty campaigns.
- **December** drives the highest sales volume, confirming strong seasonality.
- **Standard Shipping** dominates, but there may be room to promote faster shipping for added revenue or better service.
- **Several top products** like Canon printers and HP Designjets drive high revenue but vary in profit, requiring pricing strategy review.

These insights helped us refine marketing, product focus, and regional planning.

5. How did you make the dashboard accessible to all users?

Accessibility was a key design principle:

- **Color contrast** was optimized using distinct shades (e.g., purple vs. blue) for users with color vision deficiency.
- **Alt text** was added to every visual, enabling screen readers to describe the charts accurately.
- **Tooltips** were made screen-reader friendly and included detailed explanations to help users drill into complex data.

These practices made the dashboard more inclusive and easier to use for a broader audience.

6. What strategic questions does the dashboard help answer?

Each team could use the dashboard to answer key performance questions:

- **Executives**: Are we hitting our sales/profit targets? Where should we invest more?
- **Sales Managers**: Which region is lagging? When should we ramp up marketing?
- **Product Managers**: Which items are top sellers with low margins? Where can we improve profitability?
- **Marketers**: Which customer segments respond best? How can we tailor shipping strategies?

By aligning design with these real-world questions, the dashboard became a strategic tool, not just a report.

7. Summary: How effective was the dashboard in achieving its goals?

This dashboard delivered a well-rounded, filterable, and stakeholder-specific view of business performance. It effectively combined sales, profitability, customer behavior, and seasonal trends to support strategic decisions. The emphasis on accessibility and clean design also ensured usability across roles. Ultimately, it became more than a data display—it became a reflection of how thoughtful analytics can drive real impact.