**EVERPEAK ENTERPRISE SALES PERFORMANCE ANALYSIS REPORT FOR THE YEAR 2019**

**1. Outline**

This report presents a comprehensive analysis of Everpeak Enterprise’s 2019 sales performance using Microsoft Excel. It includes a deep dive into sales data to identify trends, patterns, and actionable insights across customers, regions, products, and time periods.

**Sections Covered:**

* Introduction
* Story of Data
* Data Splitting and Preprocessing
* Pre-Analysis
* In-Analysis
* Post-Analysis and Insights
* Data Visualizations & Charts
* Recommendations and Observations
* Conclusion
* References & Appendices

**2. Introduction**

**Objective of the Project**

The objective is to analyze **Everpeak Enterprise’s 2019 sales data** to understand revenue trends, customer behavior, regional performance, and product sales to inform strategic decisions for growth and profitability.

**Problem Being Addressed**

Which cities, products, and sales personnel contribute most to revenue? What patterns can be leveraged to optimize sales strategies? How can the company drive higher transaction volumes and improve regional sales balance?

**Key Datasets and Methodologies**

* Dataset: 2019 Sales Transactions (including customer, product, city, region, and amount)
* Methods: Microsoft Excel tools such as Pivot Tables, Slicers, and Charts (bar, pie, line)

**3. Story of Data**

**Data Source**

Internal company sales database for the calendar year 2019 and Kaggle.com

**Data Collection Process**

Data was extracted from the enterprise sales management system, structured into a worksheet with each row representing a transaction.

**Data Structure**

* Rows: Individual sales transactions
* Columns: Product, City, Region, Salesperson, Amount, Date, Customer

**Important Features and Their Significance**

* **Sales Amount** – Revenue indicator
* **City/Region** – Geographical performance
* **Product Category** – Sales distribution across offerings
* **Salesperson** – Individual performance metric
* **Customer** – Client contribution to revenue

**Data Limitations or Biases**

* No missing values observed
* Limited to one year, restricting longitudinal analysis
* Does not include marketing spend or external market conditions

**4. Data Splitting and Preprocessing**

**Data Cleaning**

* Removed duplicates
* Standardized product and city names for consistency

**Handling Missing Values**

None identified – dataset was complete.

**Data Transformations**

* Aggregated revenue by city, region, and customer
* Grouped sales into transaction amount bands (e.g., $0–$1000)

**Data Splitting**

* **Dependent Variable:** Sales Amount
* **Independent Variables:** City, Region, Product Category, Salesperson

**Industry Context**

Retail and Distribution – B2B/B2C product sales.

**Stakeholders**

* Sales & Marketing Teams
* Operations Managers
* Executive Leadership

**Value to Industry**

Insights from the analysis help optimize sales strategies, identify high-potential markets, and guide resource allocation for revenue maximization.

**5. Pre-Analysis**

**Identify Key Trends**

* New York is the top city by revenue ($67,180.50).
* Beverages are the highest-grossing product category ($110,577.11).
* December saw the highest monthly sales ($66,642.78).

**Potential Correlations**

* Higher sales volume aligns with major cities and top product categories.
* Top customers are consistently located in top-performing cities.

**Initial Insights**

Top sales are concentrated in a few cities and products, indicating potential for **focused marketing efforts**.

**6. In-Analysis**

**Unconfirmed Insights**

* Possible correlation between region and sales performance; North region leads ($141,660.34), but is it due to population or salesforce?
* Sales dip in February and July, possibly due to seasonality.

**Recommendations (Preliminary)**

* Target underperforming regions with tailored offers.
* Increase inventory and promotions during December peak.
* Encourage high-value transactions to reduce dependency on low-amount sales.

**Excel Techniques Used**

* **Pivot Tables**: Aggregated data by city, customer, category
* **Slicers**: Enabled quick data filtering
* **Formulas**: SUMIFS, VLOOKUP for matching and calculations
* **Charts**: Bar, Line, Pie, and Column for visualization

**7. Post-Analysis and Insights**

**Key Findings**

* Top Salesperson: Nancy Freehafer ($104,242.34)
* Top Company: Company D ($67,180.50)
* Top Region: North ($141,660.34)
* Highest Sales Product: Beverages
* Transaction Trend: Majority under $1,000 (218 transactions)

**Comparison with Initial Findings**

Sales concentration in specific cities and products was confirmed. Transaction size was lower than expected, suggesting opportunity to increase transaction value.

**8. Data Visualizations & Charts**

**Dashboard Overview**

* Top 5 Cities by Revenue (Bar Chart)
* Sales Trends Report (Line Graph)
* Transaction by Amount (Column Chart)
* Sales by Product Category (Column Chart)
* Sales by Region (Donut Chart)
* Top 10 Customers (Bar Chart)
* Sales by Shipping City (Pie Chart)
* Performance by Salesperson (Bar Chart)

**Explanation**

* Sales Trends Report shows monthly fluctuations with peak in December.
* Transaction by Amount chart indicates that low-value transactions dominate.
* Sales by Region identifies North as highest performing.
* Top 10 Customers contribute significantly to revenue concentration.

**9. Recommendations and Observations**

**Actionable Insights**

1. Focus on High-Performing Cities: Expand efforts in New York, Portland, and Miami.
2. Promote High-Revenue Products: Invest in marketing and logistics for Beverages.
3. Incentivize Larger Orders: Introduce volume discounts to shift customers from < $1,000 orders.
4. Regional Optimization: Customize strategies for East, South, and West to mirror North’s success.
5. Replicate Success: Use best practices from Nancy Freehafer and Company D across the salesforce and client base.

**Unexpected Outcomes**

* Despite South region's potential, it underperforms relative to its size – further research needed.
* July’s low sales may indicate seasonal fatigue or market saturation.

**10. Conclusion**

**Key Learnings**

* Sales are concentrated in few cities and products.
* Low transaction values dominate; this can be improved.
* Regional performance is uneven, with opportunity to grow in underperforming areas.

**Limitations**

* One-year data only; cannot identify long-term trends.
* Does not consider external factors like marketing, competition, or macroeconomics.

**Future Research**

* Include multi-year data for trend forecasting.
* Integrate marketing spend to analyze ROI.
* Explore customer segmentation for targeted promotions.

**11. References & Appendices**

**References**

* Internal Sales Database (Everpeak Enterprise, 2019)
* Microsoft Excel Documentation

**Appendices**

* Full Dashboard Screenshots
* Pivot Table Configurations
* Formula List (e.g., SUMIFS, VLOOKUP examples)