# Financial Performance Dashboard – Detailed Project Report

## 1. Introduction

The Financial Performance Dashboard project aims to provide business insights using a structured approach to data analysis through Microsoft Excel. The dataset consists of global retail sales records, and the goal is to develop a visually rich, interactive dashboard that highlights the most important KPIs such as Total Sales, Profit, COGS, Discounts, and more.

The dashboard is intended for stakeholders who require a quick and insightful view of business performance across different dimensions such as Product Categories, Countries, Segments, and Years.

## 2. Dataset Overview

The dataset used in this project is named 'financial\_data.csv'. It contains 700 rows and 16 columns with fields such as:  
- Segment  
- Country  
- Product  
- Category  
- Discount Band  
- Units Sold  
- Manufacturing Price  
- Sale Price  
- Gross Sales  
- Discounts  
- Sales  
- COGS  
- Profit  
- Date  
- Month Name  
- Year

The dataset covers multiple years and includes products sold across different countries. It enables comprehensive analysis by time, region, and product category.

## 3. Data Cleaning & Preprocessing

Several data quality issues were identified and resolved before proceeding with analysis:  
• Columns such as Sales, Profit, COGS, Discounts contained dashes ('-') representing missing values, which were replaced with 0.  
• Monetary fields included dollar signs and commas, which were removed using Excel's Find & Replace feature.  
• All numeric fields were converted from text to proper number format using Excel's 'Text to Columns' or formatting tools.  
• The 'Date' field was confirmed to be in date format, and 'Year' and 'Month Name' columns were used for time-series analysis.

## 4. Pivot Table Setup

To drive the dashboard, multiple Pivot Tables were created in Excel:  
  
1. KPI Summary Table:  
 - Values: Total Sales, Total Profit, Units Sold  
 - Calculated Field: Profit Margin = Profit / Sales  
  
2. Yearly Trend Table:  
 - Rows: Year  
 - Values: Sum of Sales and Sum of Profit  
  
3. Product Category Analysis:  
 - Rows: Category → Sub-Category  
 - Values: Sum of Sales and Profit  
  
4. Country/Region Analysis:  
 - Rows: Country  
 - Values: Sales  
  
5. Segment and Discount Band Analysis:  
 - Rows: Segment, Discount Band  
 - Values: Profit and Discounts

## 5. Dashboard Design

The dashboard was created on a separate sheet in Excel using the following design principles:  
  
• KPI Cards:  
 - Display Total Sales, Total Profit, Profit Margin, and Units Sold in prominent boxes.  
  
• Charts:  
 - Line Chart: Trends of Sales and Profit by Year.  
 - Column Chart: Sales by Product Category.  
 - Bar Chart: Profit by Country.  
  
• Filters/Slicers:  
 - Slicers were added for Year, Segment, Country, and Category to allow user interactivity.  
  
• Aesthetics:  
 - Clean layout with grouped sections, bold fonts for KPIs, and color-coded charts to distinguish metrics.

## 6. Key Insights

• The highest total sales were recorded in certain key countries and categories.  
• Profit margins varied widely depending on the segment and discount band.  
• Some product categories were consistently profitable year over year.  
• There is a positive sales growth trend observed over multiple years.  
• Discounts have a measurable impact on profit margins by segment.

## 7. Conclusion

This Excel-based dashboard provides a dynamic and interactive overview of financial performance. It serves as a powerful reporting tool for business analysts and decision-makers. The project successfully demonstrates how Excel Pivot Tables, charts, slicers, and simple formatting can be used to build a professional-level financial performance dashboard.  
  
Future enhancements could include automation using Power Query or migration to Power BI for more advanced visual analytics.