

Data-Driven Storytelling Presentation:

**Account sales and performance metrics
with
Sales trends**

**By
Rounak Pyne**

Introduction

- **Problem Statement**
- J.P. Morgan Chase & Co., a top global financial services firm with worldwide operations, seeks to analyze account performance metrics over the past five years (2017-2021) to understand the factors contributing to its compound annual growth rate (CAGR) in unit sales. The goal is to identify opportunities for further improvement.

Business Questions

- To examine the total unit sales for each year.
- Analyzing the YOY sales.
- Identify top account types in terms of sales.
- To find the average 5 years CAGR based on account type.
- Identify the top and bottom accounts in sales.
- Identify the top decision maker with highest sales.

Data Used to answer the questions

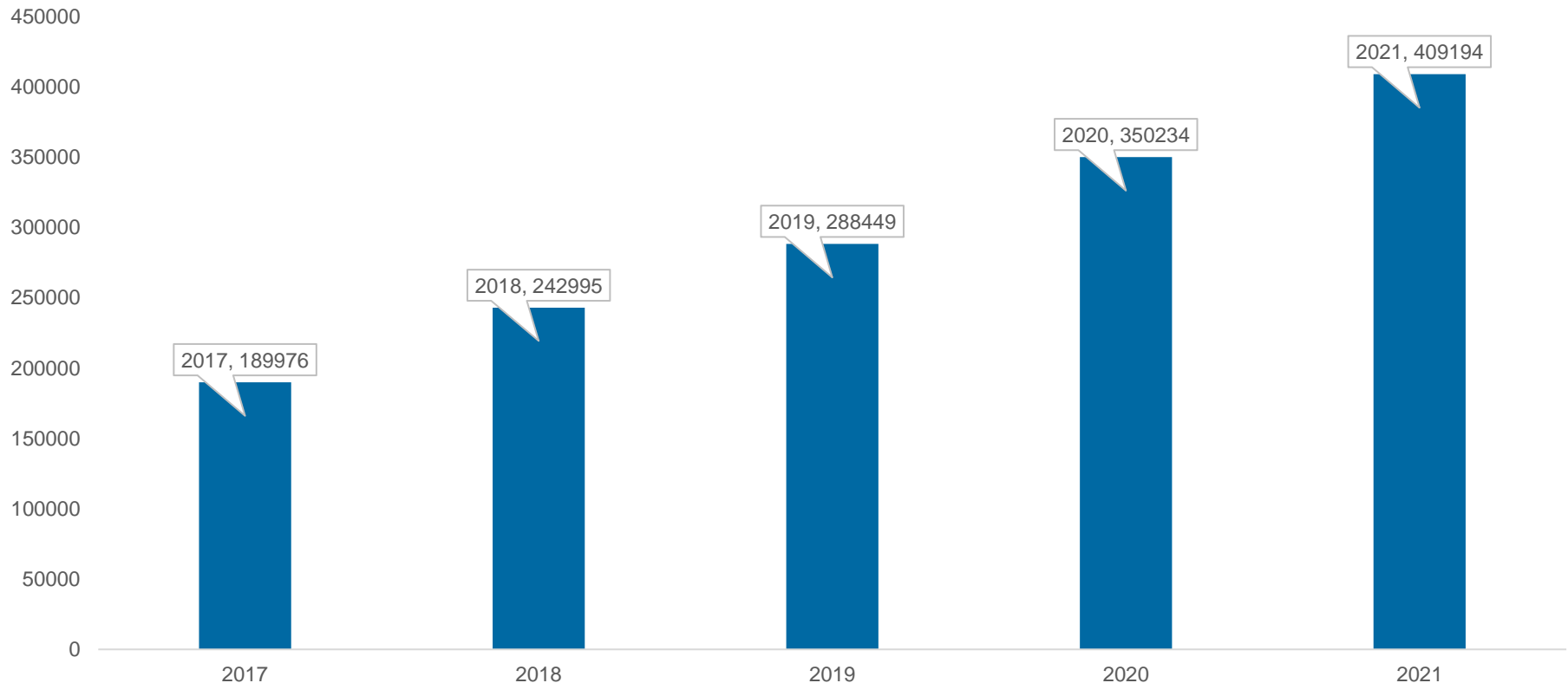
With the help of power query cleaned and optimized Data. Then structured It for analysis.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	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	Value	
2	SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	46%	2017	1982	
3	SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	46%	2018	5388	
4	SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	46%	2019	7063	
5	SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	46%	2020	7208	
6	SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	46%	2021	9093	
7	SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	25%	2017	2786	
8	SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	25%	2018	3804	
9	SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	25%	2019	4121	
10	SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	25%	2020	6210	
11	SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	25%	2021	6909	
12	SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	69%	2017	1209	
13	SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	69%	2018	1534	
14	SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	69%	2019	1634	
15	SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	69%	2020	4302	
16	SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	69%	2021	9768	
17	SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	80%	2017	906	
18	SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	80%	2018	1251	
19	SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	80%	2019	2897	
20	SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	80%	2020	4499	
21	SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	80%	2021	9428	
22	SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	43%	2017	1421	
23	SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	43%	2018	1893	
24	SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	43%	2019	2722	
25	SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	43%	2020	4410	
26	SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	43%	2021	5873	
27	SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	39%	2017	2341	
28	SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	39%	2018	6105	
29	SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(594) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	39%	2019	7333	

Q1. To examine the total unit sales for each year.

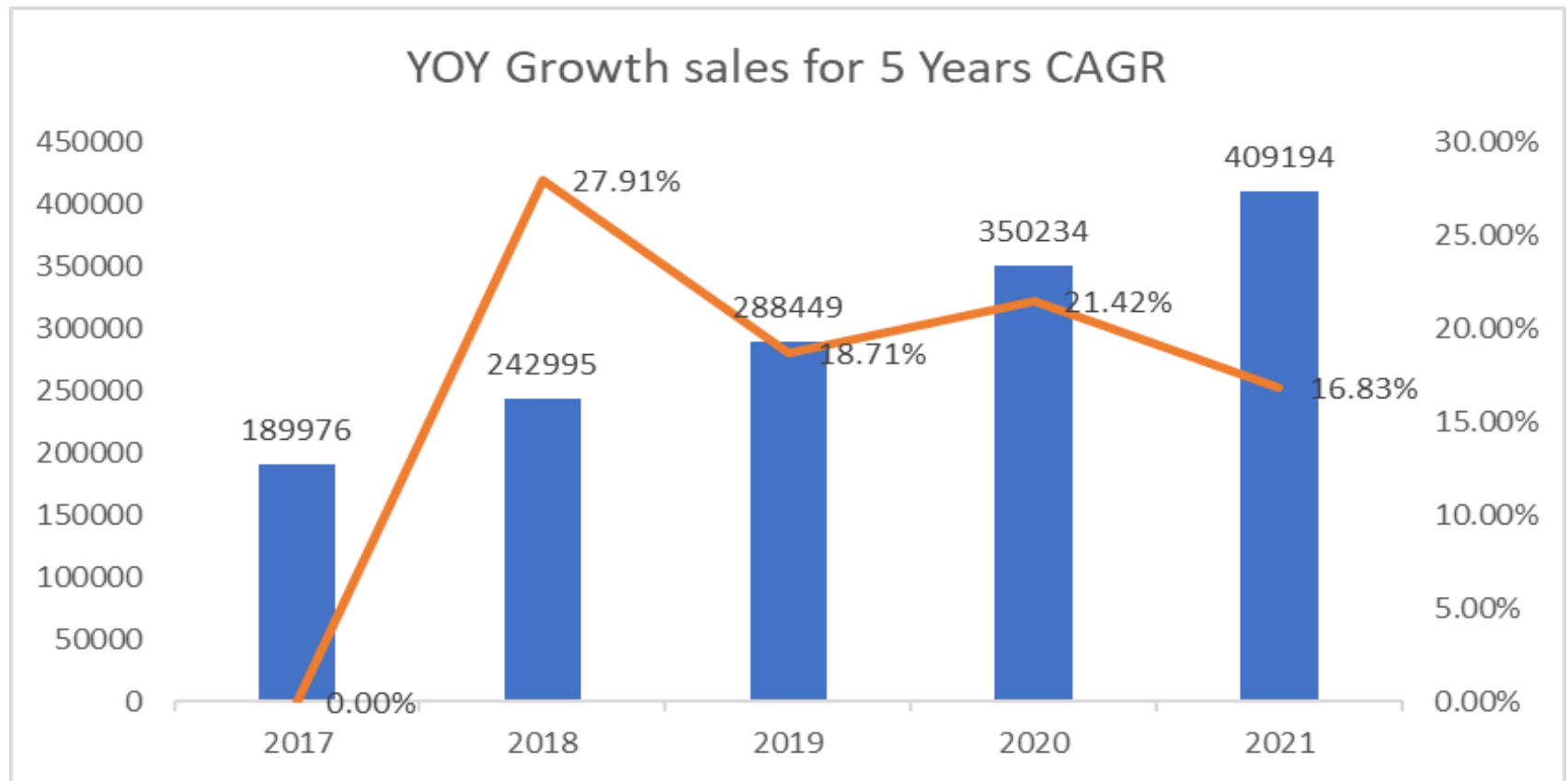
We see our sales growth has been good over the last 5 years CAGR.

Total years by sales



Q2. Analyzing the YOY sales.

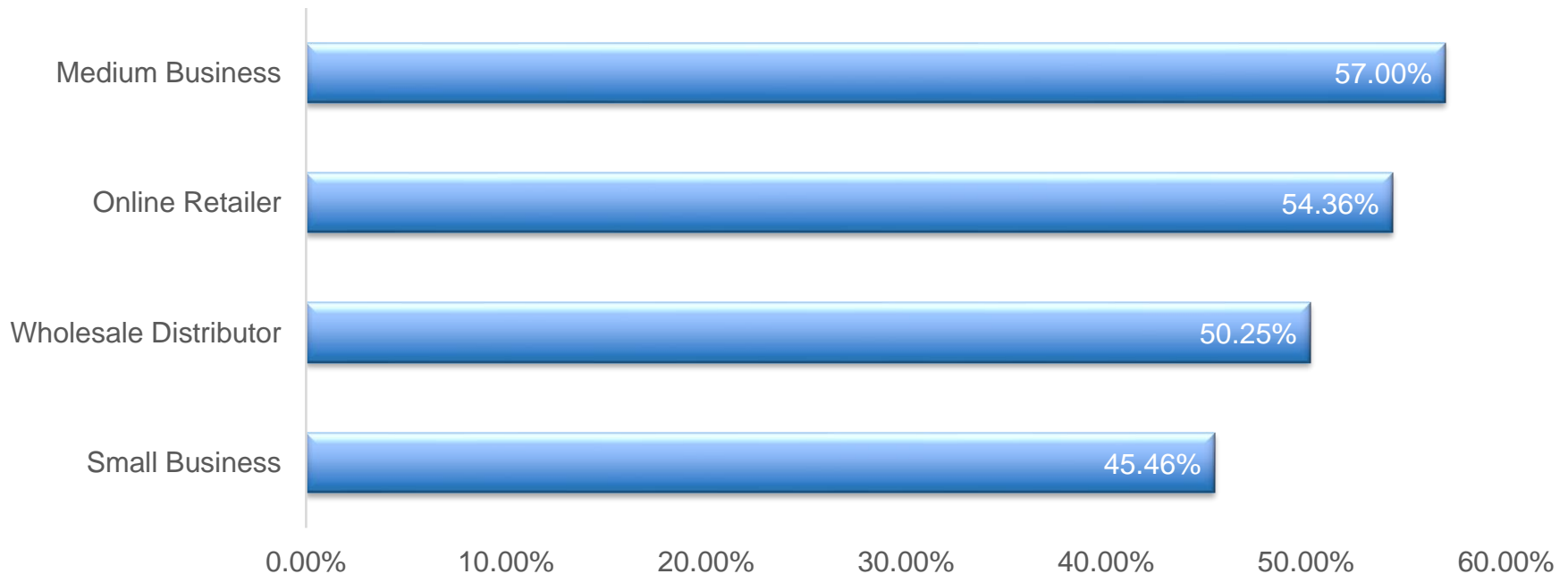
We see our sales growth has been good over the last 5 years CAGR and explaining The YOY Growth.



Q3. Identify top account types in terms of sales.

Medium Business has shown Higher CAGR of the Last 5 years making the most profitable account type.

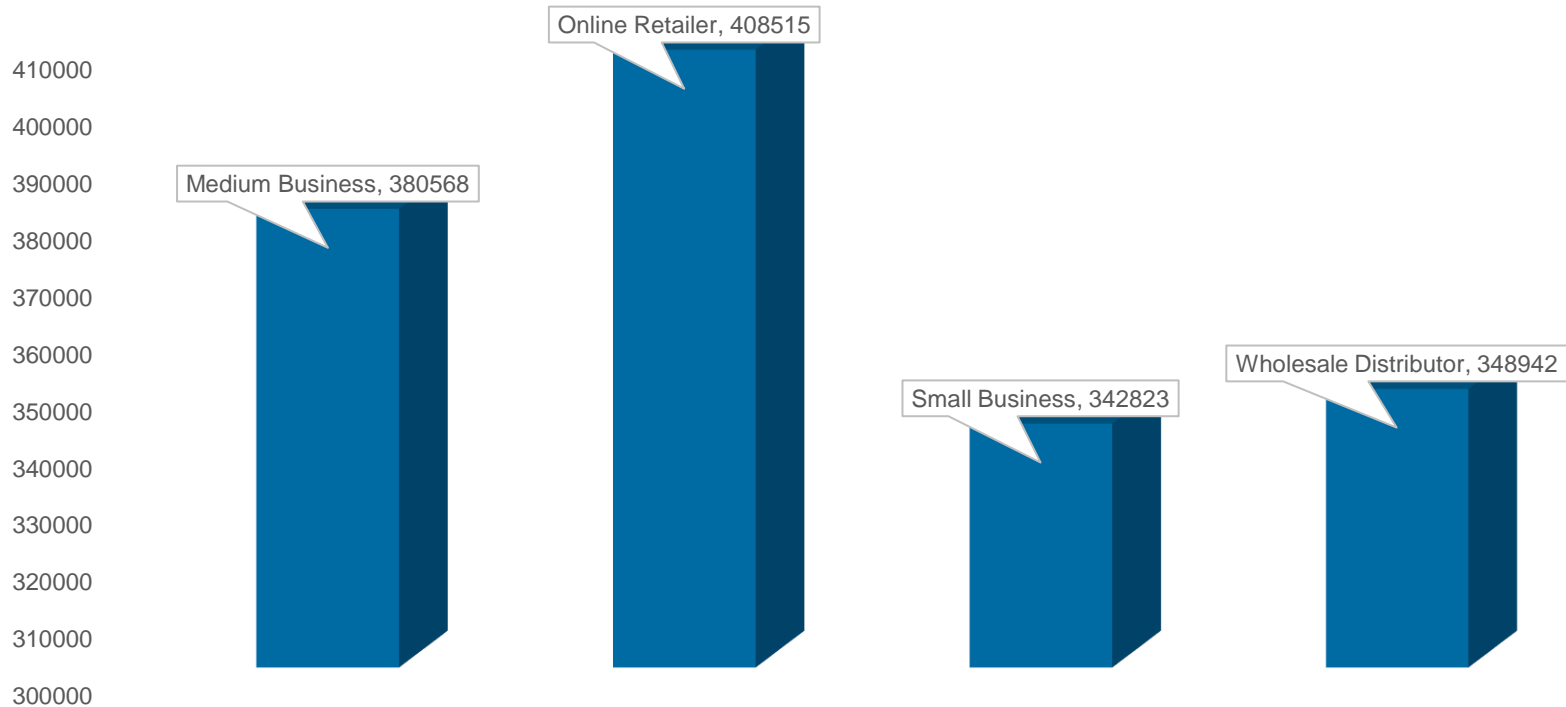
Average 5 Years CAGR by Account Type



Q4. Identify top account types in terms of sales.

Online retailers have shown enhanced sales growth over the years over other accounts.

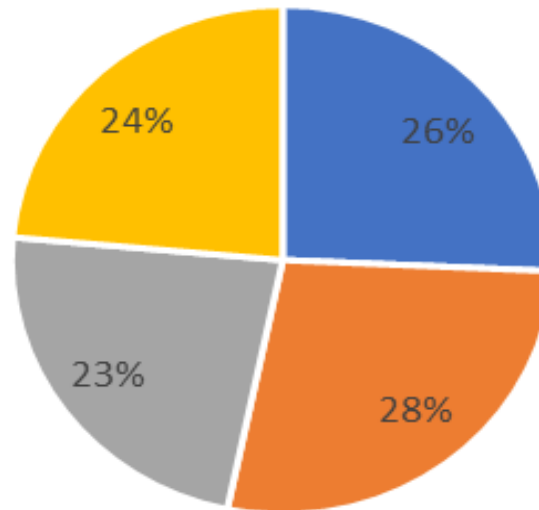
Sales of Account type by year



Q5.Sales distribution

Overall Medium business with 26% and Online Retailers with 28% have been the highest sales contributors over the last 5 years.

Overall Sales Distribution by account type

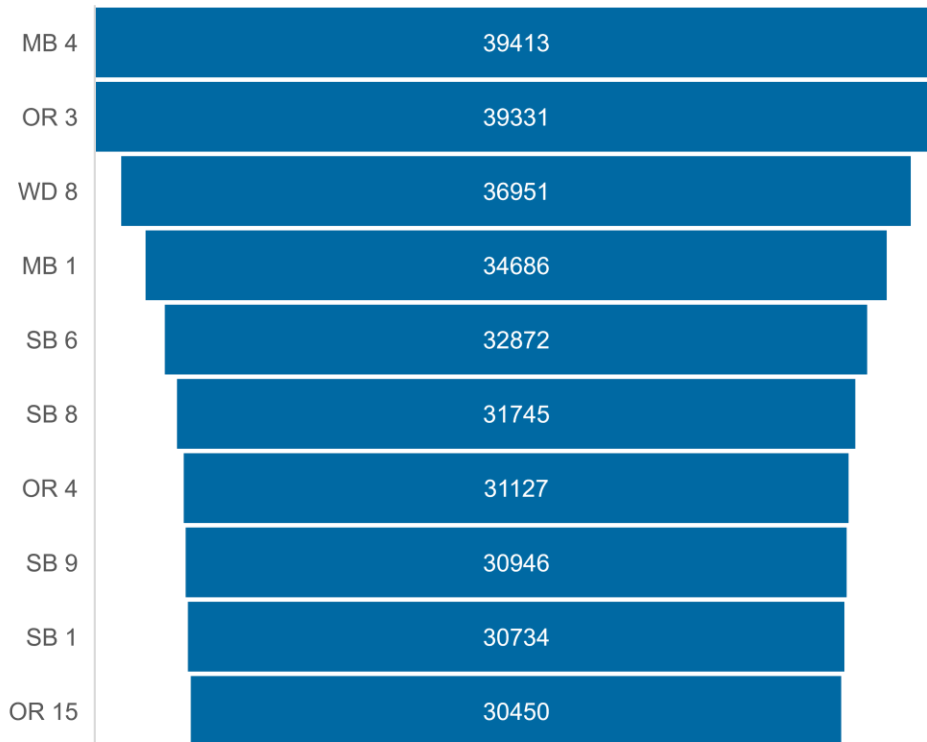


■ Medium Business ■ Online Retailer ■ Small Business ■ Wholesale Distributor

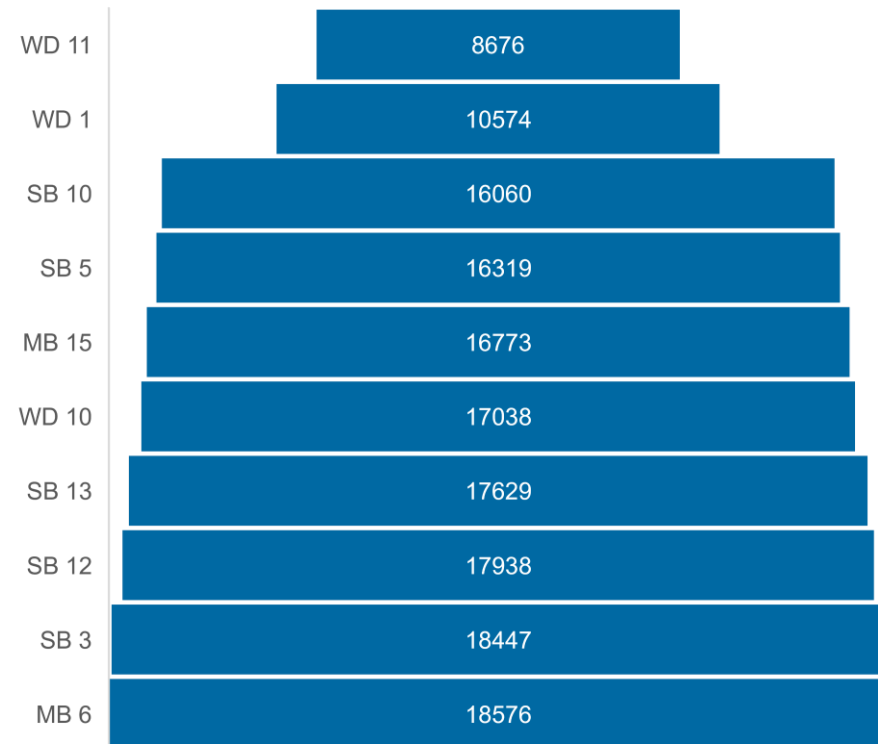
Q6. Identify the top and bottom accounts in sales.

MB 4 has been the highest performer over the years
While WD 11 has been the least performer over the tenure.

Top 10 Accounts

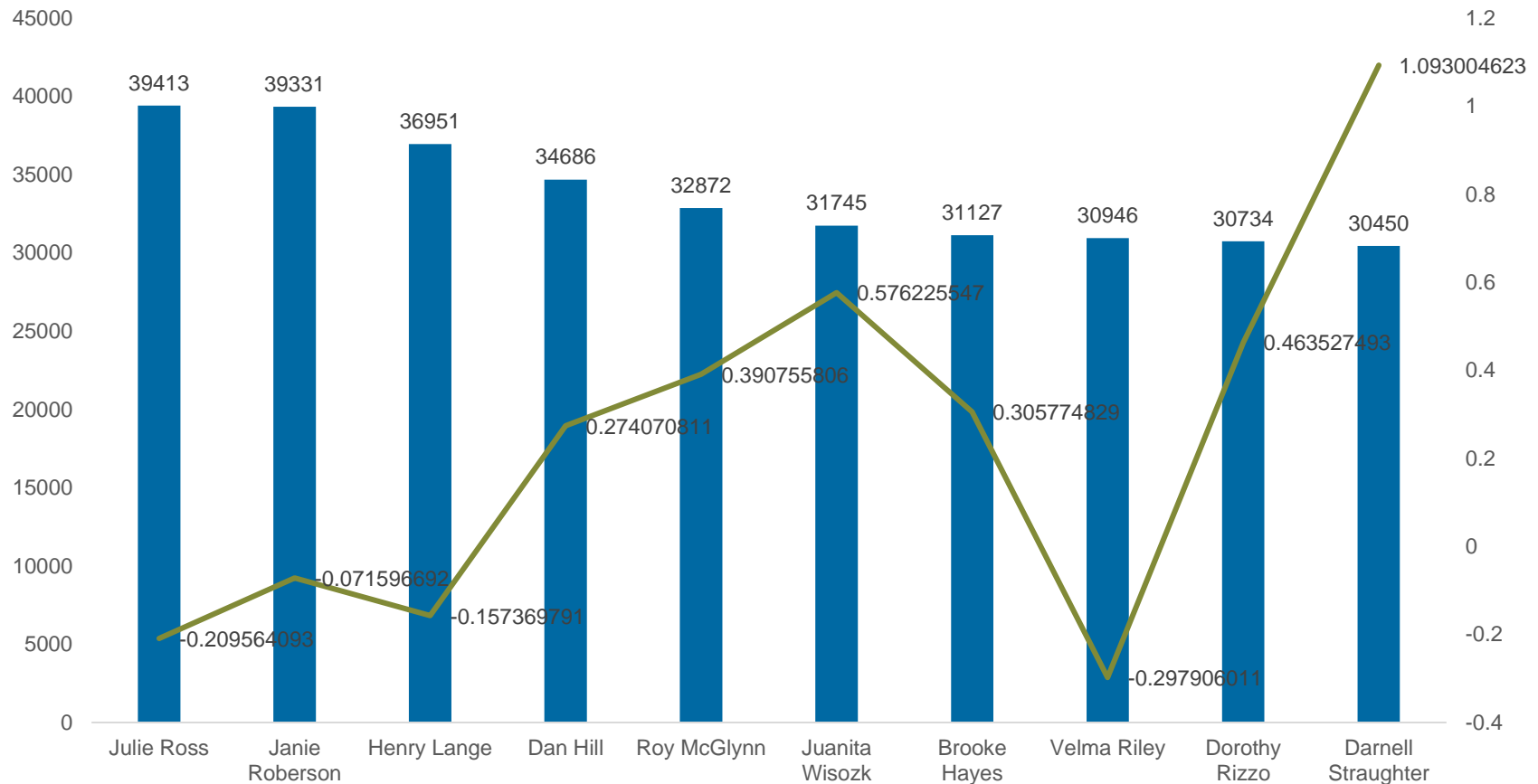


Bottom 10 Accounts



Q7. Identify the top decision maker with highest sales.

Top Decision maker in terms of sales and their avg CAGR Over the last 5 years.



Key point, observation or data here...

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