Data-Driven Storytelling Presentation:

Account sales and performance metrics with
Sales trends

By
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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.
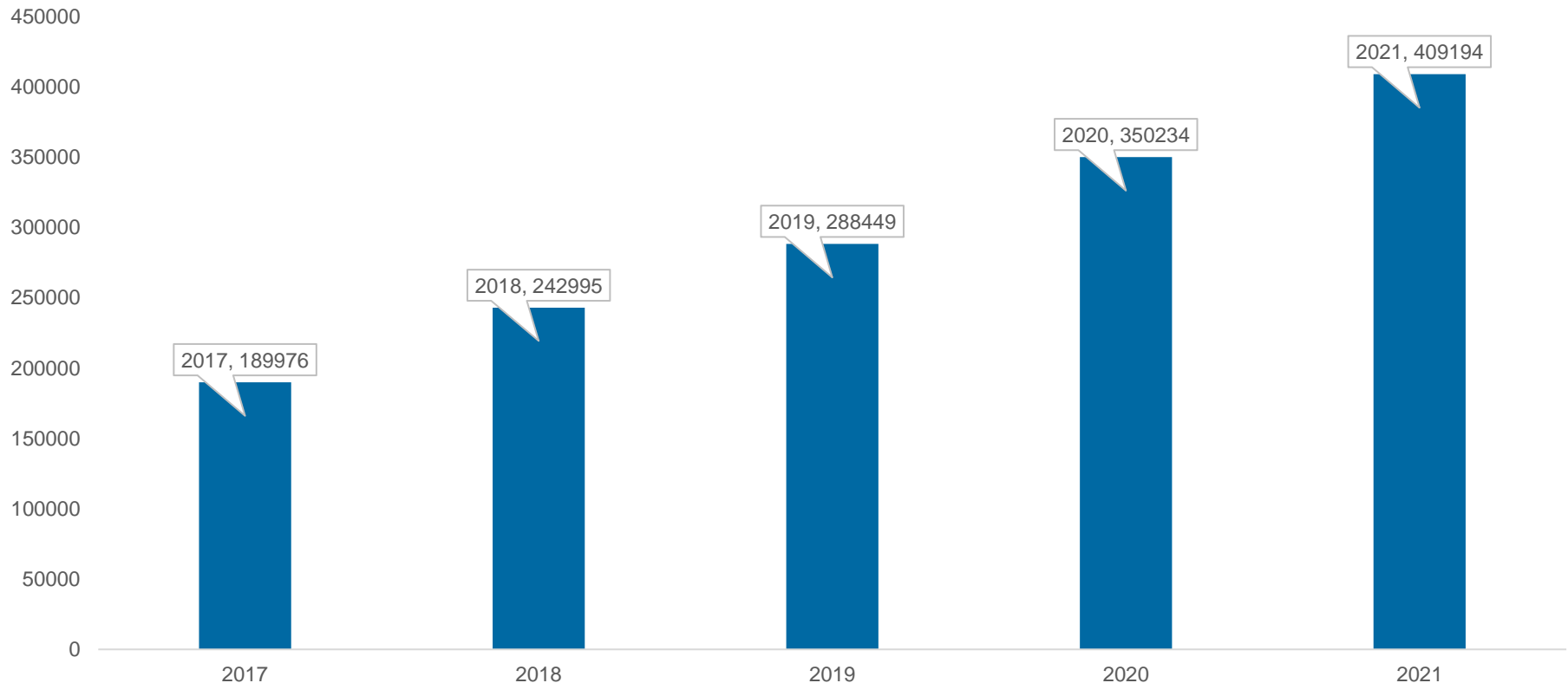
Data Used to answer the questions

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

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.

YOY Growth sales for 5 Years CAGR
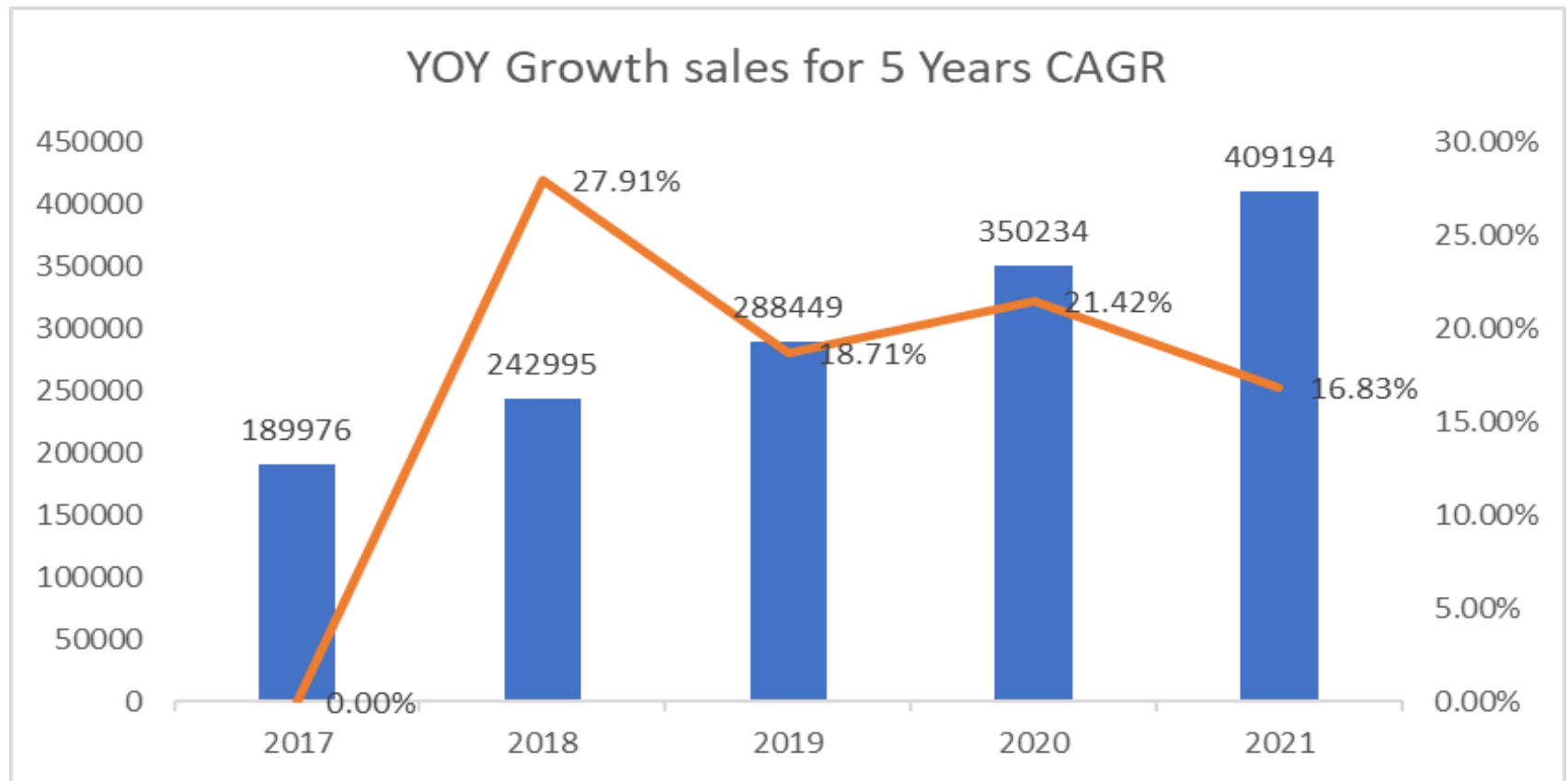
Q3.Identify top account types in terms of sales.

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

Average 5 Years CAGR by Account Type

Account Type	CAGR
Medium Business	57.00%
Online Retailer	54.36%
Wholesale Distributor	50.25%
Small Business	45.46%

0.00% 10.00% 20.00% 30.00% 40.00% 50.00% 60.00%

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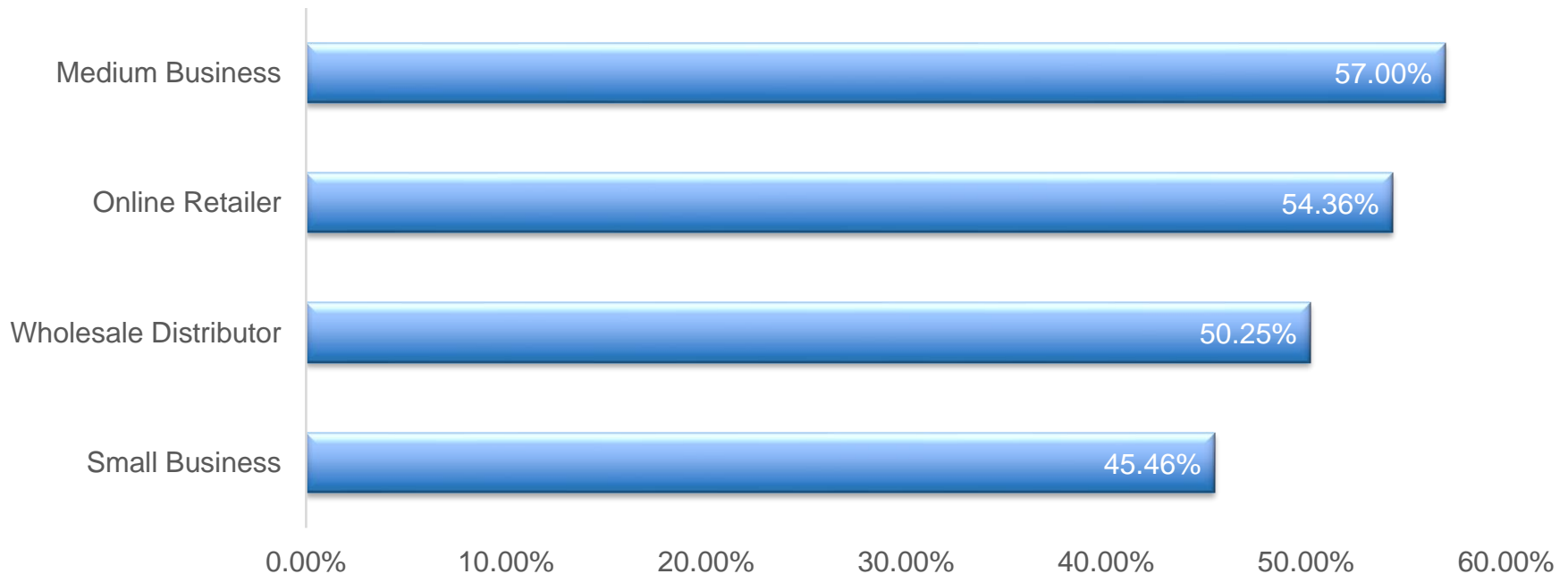
Q4.Identify top account types in terms of sales.

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

Sales of Account type by year

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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

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

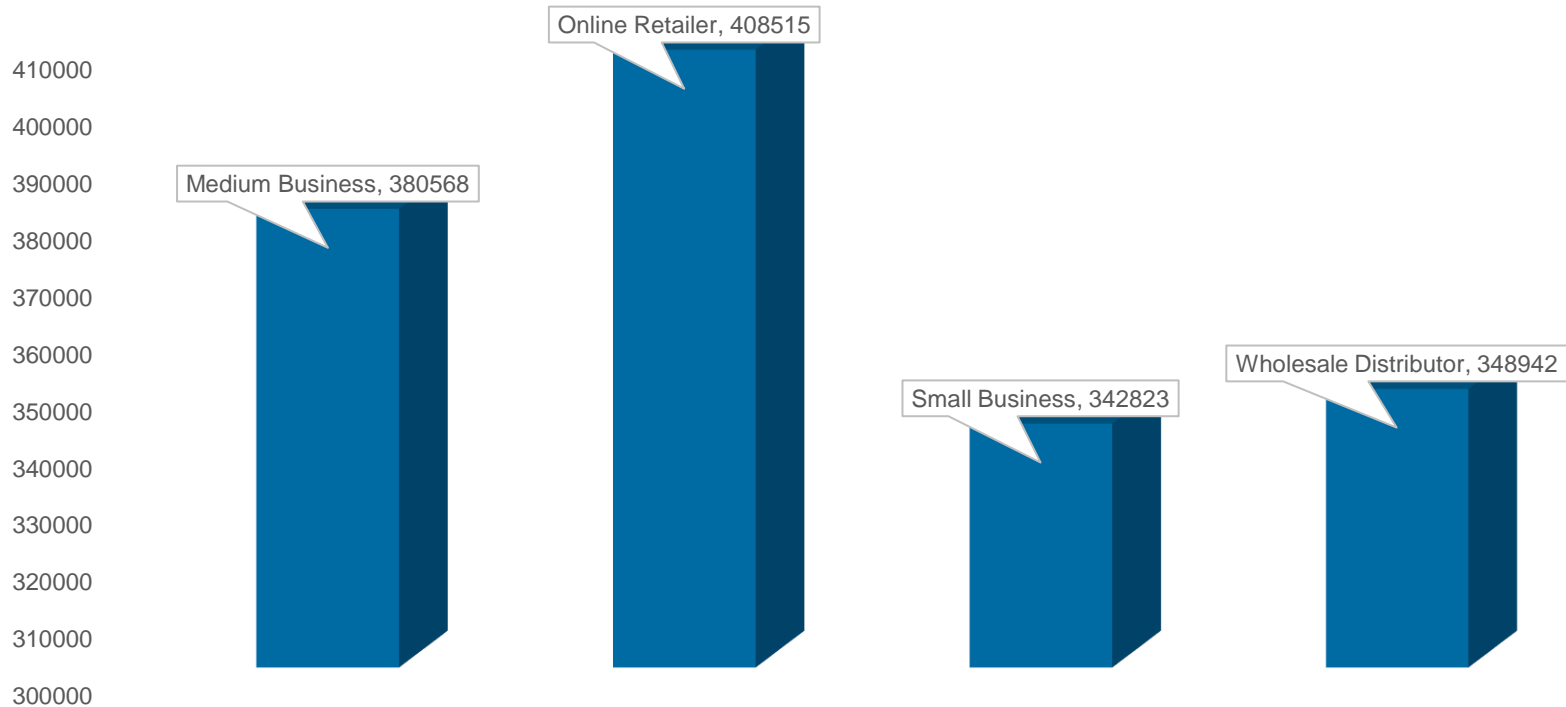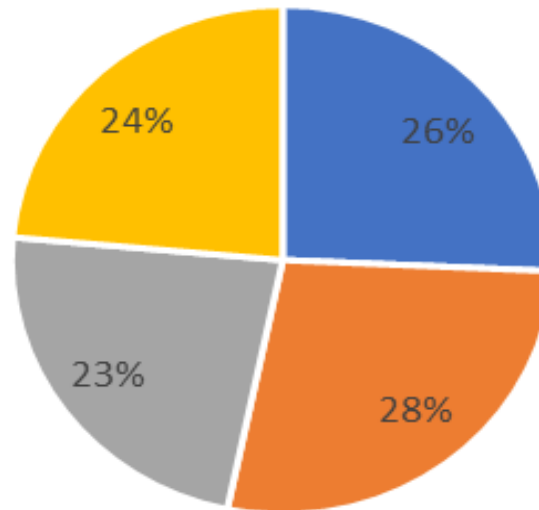| Account	Value
MB 4	39413
OR 3	39331
WD 8	36951
MB 1	34686
SB 6	32872
SB 8	31745
OR 4	31127
SB 9	30946
SB 1	30734
OR 15	30450

Bottom 10 Accounts

Account	Value
WD 11	8676
WD 1	10574
SB 10	16060
SB 5	16319
MB 15	16773
WD 10	17038
SB 13	17629
SB 12	17938
SB 3	18447
MB 6	18576

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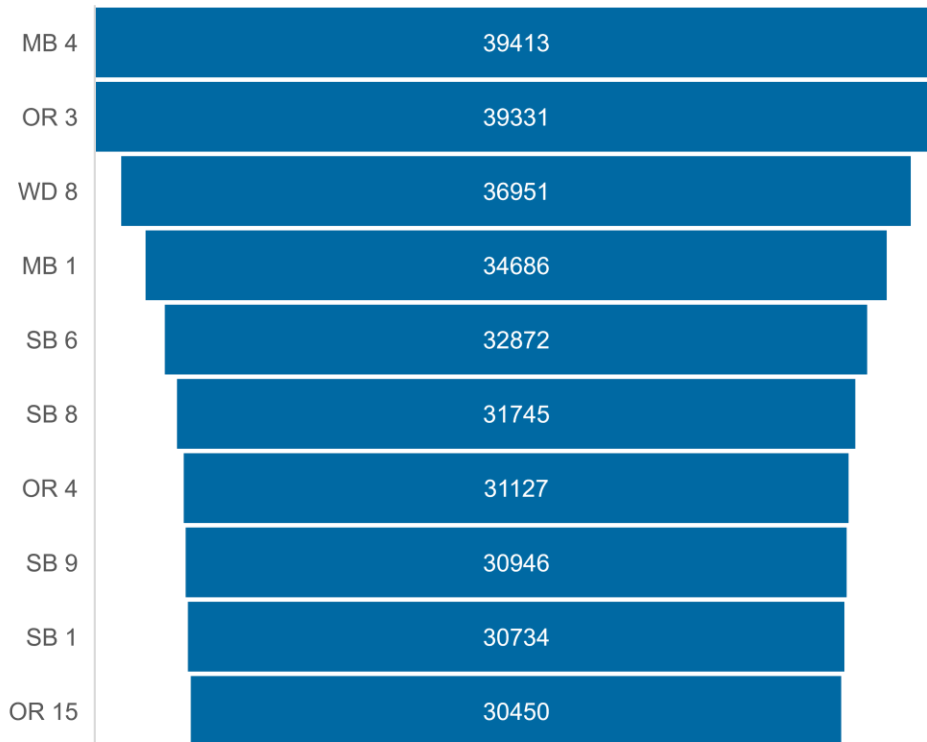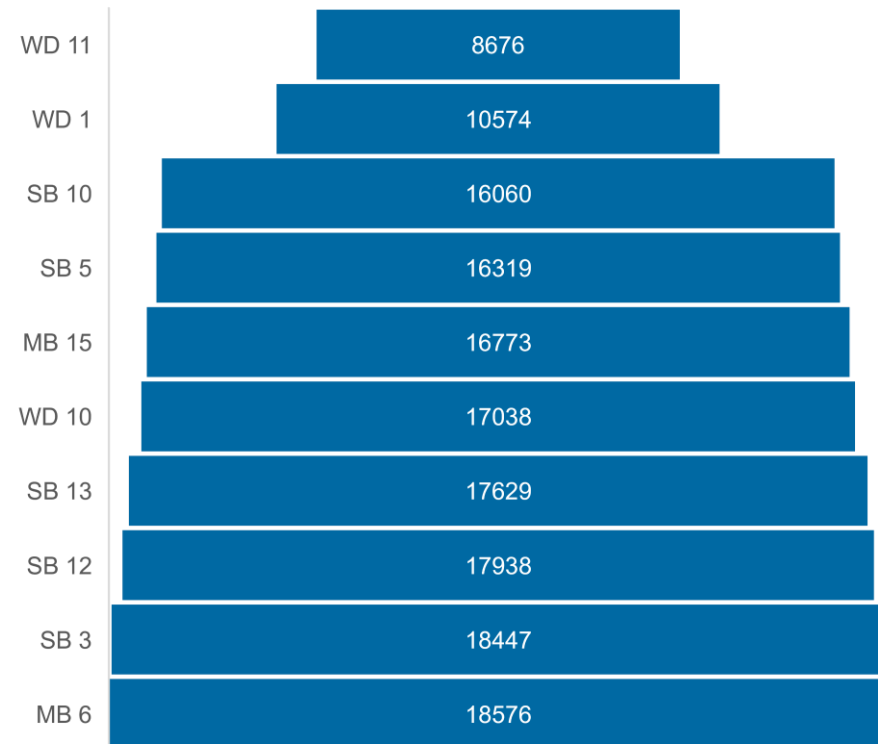
Q7.Identify the top decision maker with highest sales.

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

Key point, observation or data here…

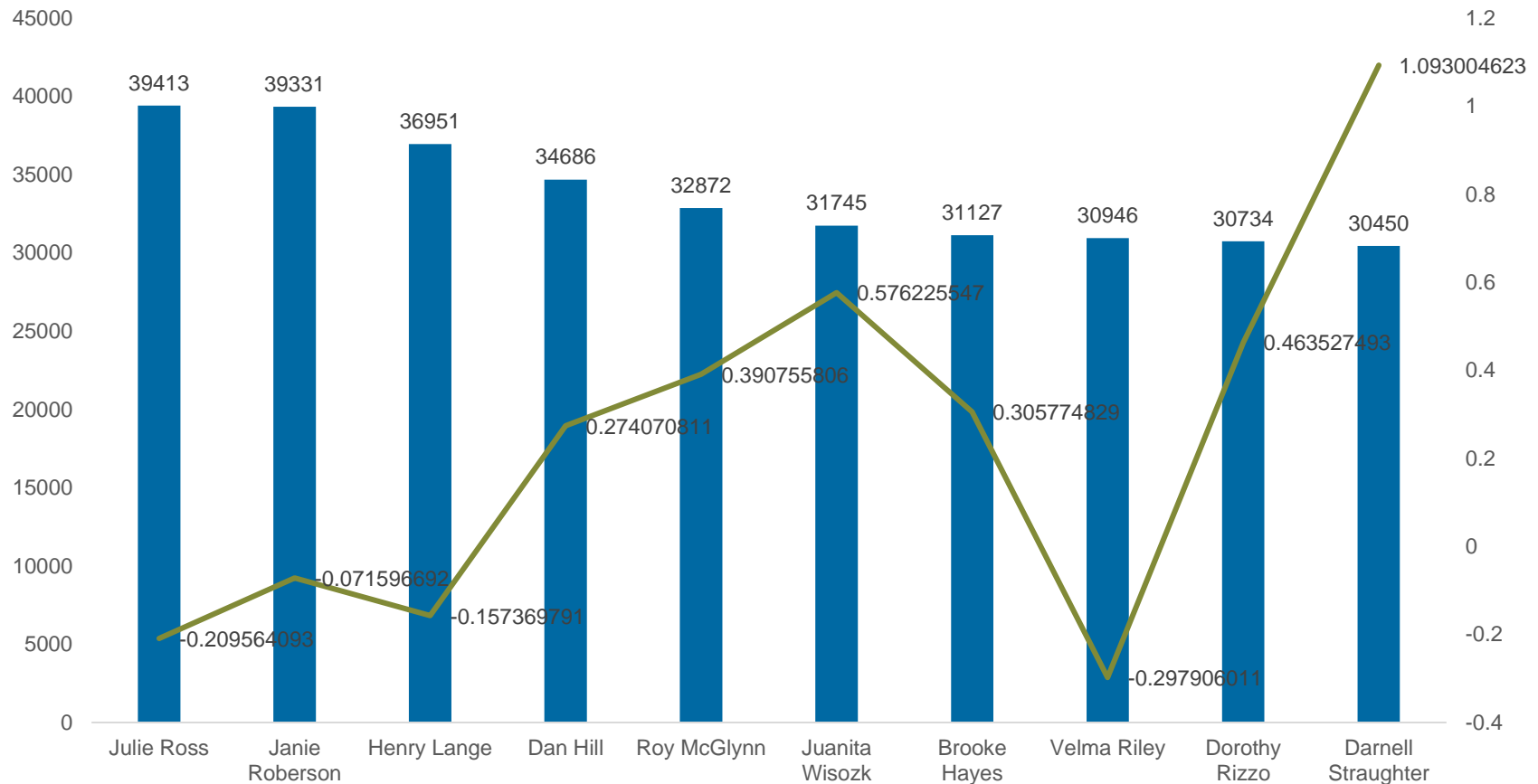1. Despite satisfactory overall sales performance, there is ample room for significant improvement.
2. Discontinuing poorly performing accounts would free up valuable sales and marketing resources.
3. The past five years have witnessed the most robust sales growth in the online retailer account category.
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.