

Project Title

Pitla Brothers Sales Analytics & Performance Dashboard

AIMS Grid (Aim – Inputs – Mechanism – Success Criteria)

A – Aim (Business Objective)

The primary aim of this project is to provide **end-to-end sales performance visibility** for Pitla Brothers by building an interactive Power BI dashboard that enables management to: - Monitor overall sales, profit, quantity, and AOV - Identify high- and low-performing categories, sub-categories, states, and customers - Analyze monthly and quarterly profit trends - Understand customer payment behavior - Support data-driven decisions to improve profitability and operational efficiency

I – Inputs (Data & Requirements)

Data Inputs

- **Sales Transactions Data**
- Order Date
- Customer Name
- State
- Category & Sub-Category
- Quantity
- Sales Amount
- Profit
- Payment Mode

Business Dimensions

- Time: Year, Quarter, Month
- Geography: State
- Product: Category, Sub-Category
- Customer
- Payment Mode

Tools & Technology

- Power BI Desktop
 - Power Query for data cleaning and transformation
 - DAX for calculated measures
 - Power BI Service (optional for sharing)
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M – Mechanism (How the Solution Works)

1. Data Preparation (Power Query)

- Remove nulls and duplicates
- Create Date hierarchy (Year, Quarter, Month)
- Standardize category, state, and payment mode values
- Create calculated columns if required (AOV, Month Name)

2. Data Modeling

- Star schema design
- Fact table: Sales
- Dimension tables: Date, Product, Customer, Geography
- Define relationships

3. Measures & KPIs (DAX)

- Total Sales Amount
- Total Quantity
- Total Profit
- Average Order Value (AOV)
- Monthly Profit Trend
- Category-wise Quantity Distribution

4. Dashboard & Visuals

- KPI Cards: Sales, Quantity, Profit, AOV
- Donut Charts: Quantity by Category, Payment Mode
- Bar Charts: Profit by Sub-Category, Amount by State, Amount by Customer
- Line Chart: Sales Amount by Month & Year
- Column Chart: Profit by Month
- Slicers: Quarter, State

5. Interactivity & Insights

- Cross-filtering between visuals
- Drill-down by time (Year → Month)
- Dynamic filtering using slicers

S – Success Criteria (Outcomes & Benefits)

Business Success Metrics

- Faster decision-making using real-time insights
- Identification of loss-making months and categories
- Improved focus on high-profit customers and states

- Better payment mode strategy based on customer behavior

Technical Success Metrics

- Dashboard refreshes without errors
- Measures return accurate values
- Clear, intuitive, and visually consistent design

User Adoption

- Stakeholders can answer key business questions without external analysis
 - Reduced dependency on manual Excel reports
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Key Business Questions Answered

- Which month and quarter are most profitable?
 - Which category and sub-category drive maximum profit?
 - Which states and customers contribute the most to revenue?
 - Which payment modes are most commonly used?
 - Where are losses occurring and why?
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Final Deliverable

A fully interactive **Power BI Sales Dashboard** that provides a 360° view of Pitla Brothers' sales performance and supports strategic planning and operational improvements.