Sales Performance Analysis Report

Prepared for: Stakeholders (Internal Distribution) **Date:** December 8, 2025 **Subject:** Optimizing Sales Effectiveness and Resource Allocation based on Q3/Q4 2017 and Q1 2018 Data.

Business Analytics Problem (AIMS Grid)

This analysis is driven by the need to shift from generalized sales efforts to targeted strategic investments by identifying key performance drivers in our database.

Component	Description
A - Aim (Goal)	**Optimize Sales Effectiveness and Resource Allocation.** Maximize overall sales revenue and quantity by identifying high-growth product, customer, and market segments.
I - Issue (Pain Point)	Lack of clarity on which **Markets (Zones)**, **Customer Types**, or **Product Types** are the primary drivers of growth, leading to generalized sales strategies and inefficient resource distribution (e.g., inventory, marketing spend).
M - Measure (KPIs)	1. **Total Sales Amount** (Overall Revenue)
	2. **Sales Amount by Market Zone** (Geographic Performance)
	3. **Average Deal Size** (SUM(sales_amount) / COUNT(DISTINCT order_date, product_code, customer_code))
	4. **Sales Amount by Customer Type** (Channel Performance)
S - Solution/Strategy	**Drill-down Strategy:** Identify the top 3 and bottom 3 performing segments (by Zone, Product Type, and Customer Type). Recommend targeted strategies: **Invest** in high-potential segments and **optimize** (or discontinue) low-performing ones.

Tableau Visualization Plan

The following visualizations are essential for diagnosing performance drivers and measuring the success of the recommended strategies.

#	Visualization Title	Visualization Type	Measures & Dimensions	Purpose
1	**Monthly Sales Trend**	Line Chart	**Measure:** Sales Amount; **Dimension:** Order Date (set to Month/Year)	Tracks overall growth and identifies seasonality or spikes.
2	**Sales by Market Zone**	Bar Chart (Sorted)	**Measure:** Sales Amount; **Dimension:** Zone	Quick identification of the highest and lowest performing geographic areas.
3	**Product Type Contribution**	Pie Chart / Donut	**Measure:** Sales Amount; **Dimension:** Product Type	Determines which product category (Software vs. Hardware) contributes most to revenue.
4	**Customer Type Performance**	Tree Map	**Measure:** Sales Amount; **Dimension:** Customer Type,	Visualizes the revenue contribution of channels and identifies top individual customers.

			Customer Name	
5	**Average Deal Size Comparison**	Bar Chart	**Measure:** Average Sales Amount; **Dimension:** Customer Type	Assesses transaction value efficiency across the E-Commerce vs. Brick & Mortar channels.
6	**Top 10 Products by Revenue**	Bar Chart (Filtered)	**Measure:** Sales Amount; **Dimension:** Product Name	Pinpoints specific products that should receive priority investment/inventory.
7	**Geographic Sales Heatmap**	Map View	**Measure:** Sales Amount; **Dimension:** Market Name	Provides a granular, visual understanding of regional performance density.

Stakeholder Report and Recommendations

Executive Summary

Analysis of the recent sales data reveals that while overall sales volume is increasing, there is significant disparity in performance across segments. **Software** and the **E-Commerce** channel are generating disproportionately high revenue, but several key geographic markets (specifically the **South** and **East** zones) are severely underperforming. We must adopt a surgical, data-driven approach to resource allocation to maximize profitability.

Key Insights from Data Analysis

Area	Observation	Strategic Implication
1. Overall Trend	Sales show a **positive upward trend** from June 2017 to February 2018.	The business is fundamentally healthy and poised for accelerated growth if resources are allocated effectively.
2. Product Mix	**Software** products are confirmed as the high-margin, high-revenue drivers, overshadowing Hardware sales.	Focus should shift to **scaling the Software portfolio** and supporting products aggressively.
3. Customer Channels	The **E-Commerce** channel, while possibly having fewer transactions than Brick & Mortar, often generates a **higher average deal size**.	The E-Commerce channel is highly efficient for high-value transactions and warrants increased investment.
4. Geographic Zones	Performance is heavily skewed toward the **West** and **Central** zones. The **South** and **East** zones are significant areas of underperformance.	Resource reallocation and strategic intervention are immediately required in the South and East zones to unlock dormant market potential.

Strategic Recommendations

We recommend implementing the following three targeted strategies to capitalize on our strengths and mitigate underperformance:

1. Targeted Market Penetration (South & East Zones)

- **Action:** Launch a 60-day accelerated growth program focusing exclusively on the low-performing **South** and **East** zones. This includes deploying specialized sales teams and localized marketing campaigns.
- **KPI:** Achieve **20% growth in Sales Quantity** month-over-month (MoM) in these zones for the next quarter.
- **Rationale:** Low-performing markets represent untapped revenue potential. We must tailor our approach to overcome local market resistance and increase market share rather than accepting stagnation.

2. Optimize Product & Inventory Strategy

- **Action:** Conduct a formal resource alignment effort, **shifting inventory and sales team focus** away from low-performing Hardware products and dedicating priority to the **top 5 Software products** by revenue.
- **KPI:** Increase the revenue contribution of the top 5 products to **65%** of total revenue within the next two reporting cycles.
- **Rationale:** Aligning resources with the highest-margin and highest-demand products ensures maximum return on inventory investment and sales effort.

3. Enhance E-Commerce Channel Efficiency

- **Action:** Increase the digital marketing budget and IT resources dedicated to the **E-Commerce** platform, specifically targeting acquisition of high-value B2B/Corporate customers.
- **KPI:** Increase the **Average Deal Size** for E-Commerce customers by **10%** in the next quarter.

- **Rationale:** E-Commerce has proven to be an efficient channel for high-value transactions. Scaling this channel provides sustainable, high-leverage growth.