



Institute Of Emerging Careers

# PORTFOLIO PROJECT



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## Confectionery sales Data

**PRESENTED BY**

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# Business overview

- Operating in New York State
- 8 Retail Outlets, 1 Warehouse, 1 Centralized HQ
- Organized into 5 distinctive Product Groups
- Monthly sales targets for each product group



### **Scope of the study**

- Explore performance of specific outlets: Outlet 3, Outlet 5, and Outlet 8. In Month of April 2019.
- Understand sales performance.
- Analyze client distribution across generations.

### **Stakeholders**

- Project stakeholders: Sales & marketing teams

# OBJECTIVE

- Determine success of sales goals for outlets 3, 5, and 8.
  - Identify reasons for both success and non-success.
  - Uncover factors behind achievements and shortcomings.
  - Study different client generations.
  - Gain insights for future sales strategies.
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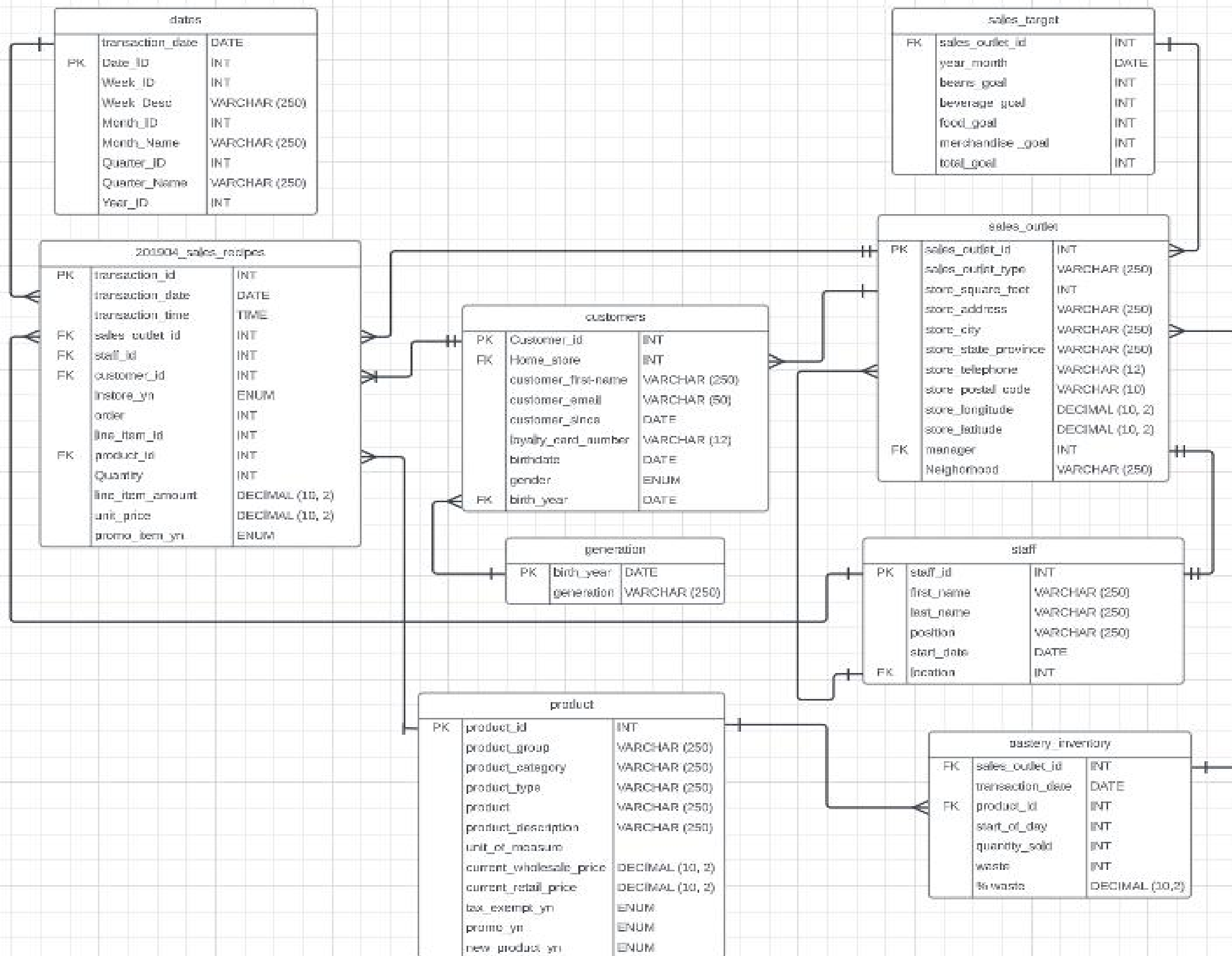
# PROBLEM STATEMENT

## **Sales Performance Analysis / Sales Target:**

1. Which sales outlets achieved their April quantity goals?
2. How did each sales outlet perform in meeting monthly sales goals across product group?
3. What are the top 10 products consistently purchased by repeat customers?
4. How can repeat-purchased products be categorized, and to which groups do they belong?
5. Which frequently repurchased items exist in each product group, and what's their group's total product count?

## **Client Generation Distribution:**

1. How were clients distributed across different generation categories in April 2019?
2. What are the spans of each generation category and their average yearly customer count?
3. What's the average count of repeat customers per generation category?

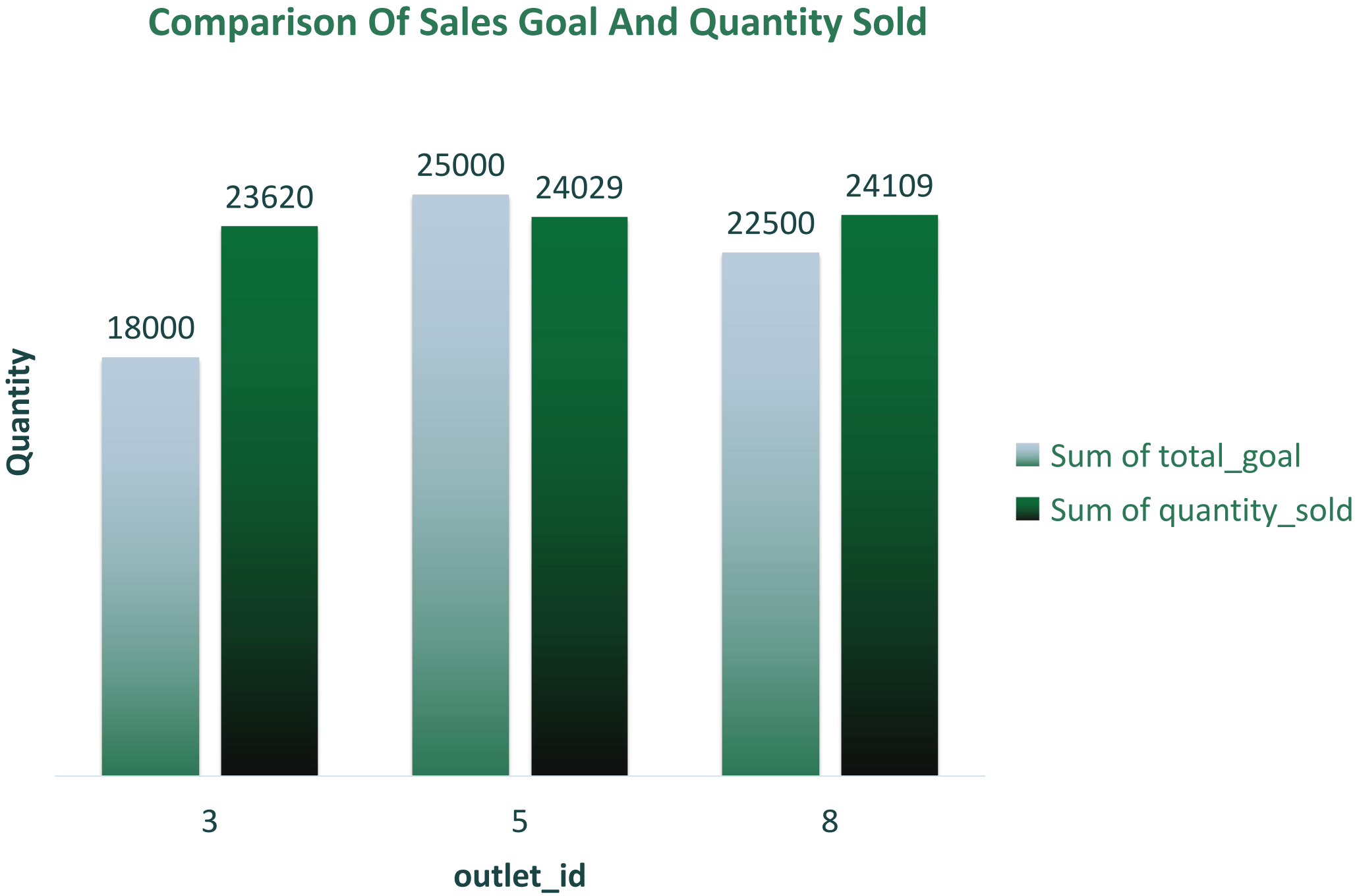


# ERD

# 1- April Quantity Goal Status Across Sales Outlets

sales outlet id	total goal	quantity sold	status
3	18000	23620	achieved
5	25000	24029	not-achieved
8	22500	24109	achieved

Outlet 3 and Outlet 8 successfully achieved their quantity goals, while Outlet 5 did not meet its goal.





## 2- April Quantity Goal Status Across Sales Outlets For Each Product Group

Sales_outlet_id	Product group	Goal	Quantity_sold	Status
3	beans goal	720	313	Not-achieved
3	beverage goal	13500	20001	Achieved
3	food goal	3420	2489	Not-achieved
3	merchandise goal	360	94	Not-achieved
5	beans goal	1000	362	Not-achieved
5	beverage goal	18750	19282	Achieved
5	food goal	4750	2694	Not-achieved
5	merchandise goal	500	125	Not-achieved
8	beans goal	900	493	Not-achieved
8	beverage goal	16875	19822	Achieved
8	food goal	4275	2581	Not-achieved
8	merchandise goal	450	36	Not-achieved



## 2-April Quantity Goal Status Across Sales Outlets For Each Product Group

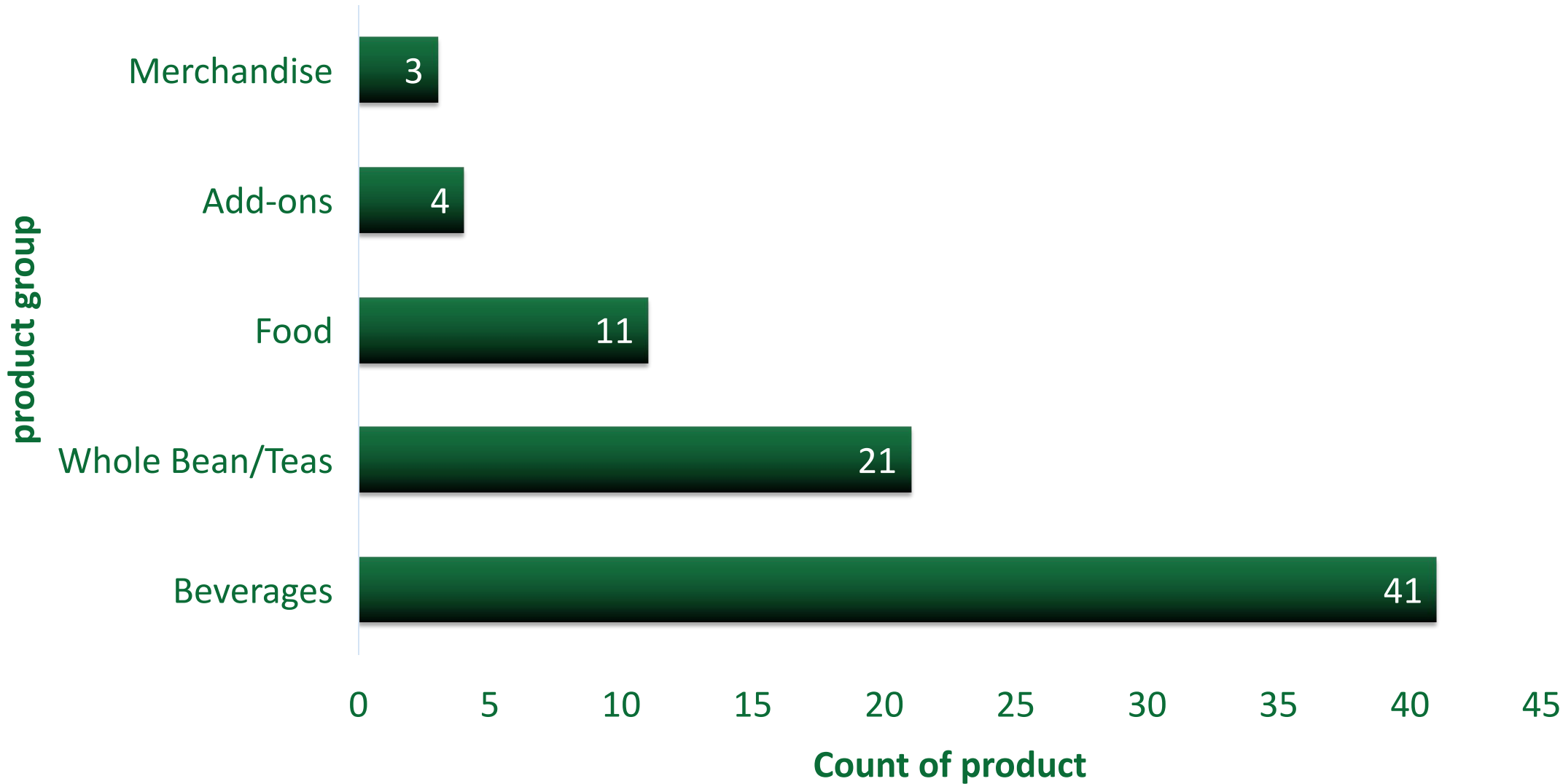
- Beverage product group is the solo achiever of its quantity sold across all sales outlets.
- other product group have fallen short of their targets.



### 3- Count of Products Purchased by Repeat Customers, Segmented by Product Groups

Count of product purchased by repeated customer in each product group

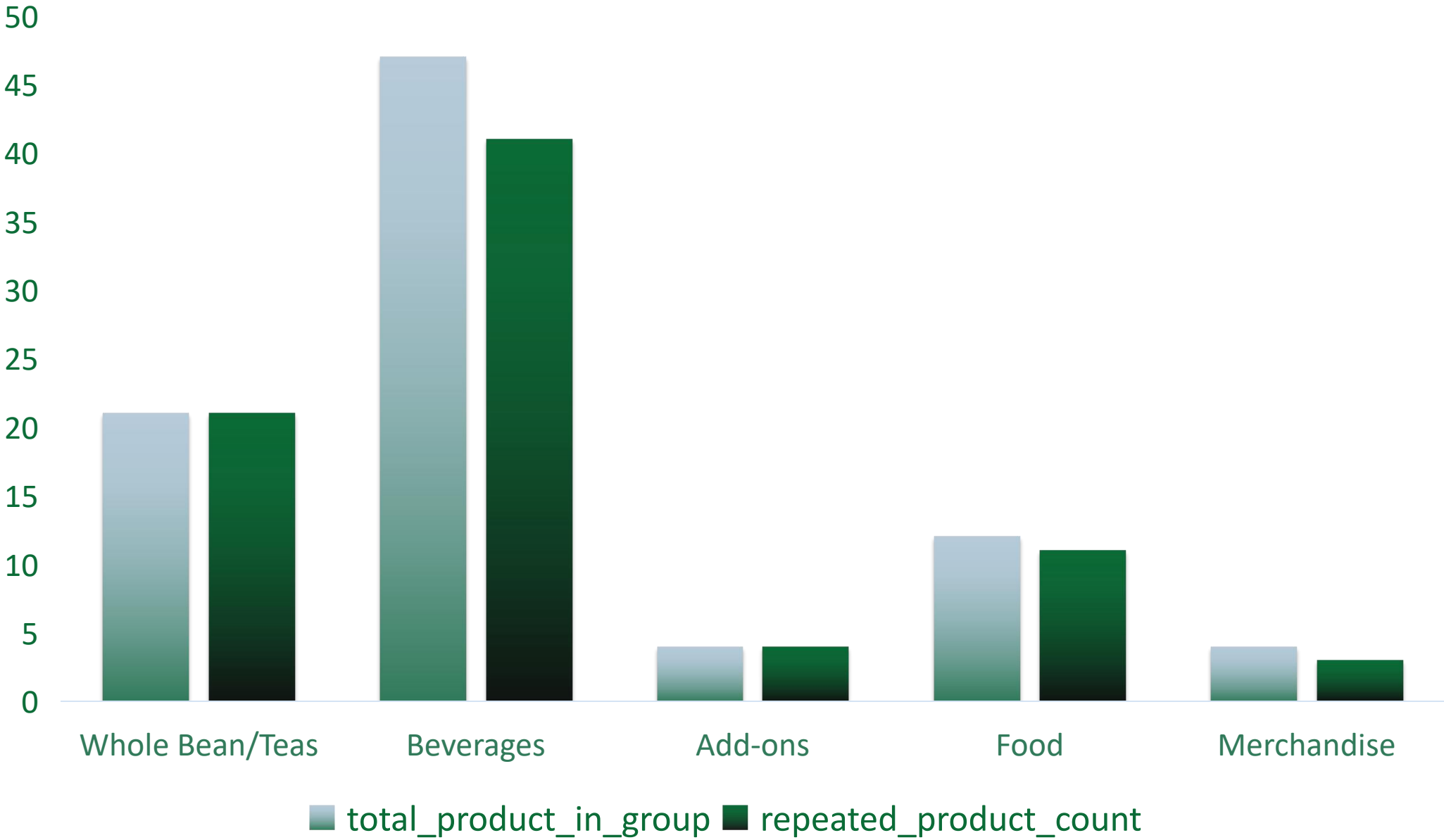
Product_group	Count of product
Beverages	41
Whole Bean/Teas	21
Food	11
Add-ons	4
Merchandise	3



# 4- Count of Products Purchased by Repeat Customers, Segmented by Product Groups

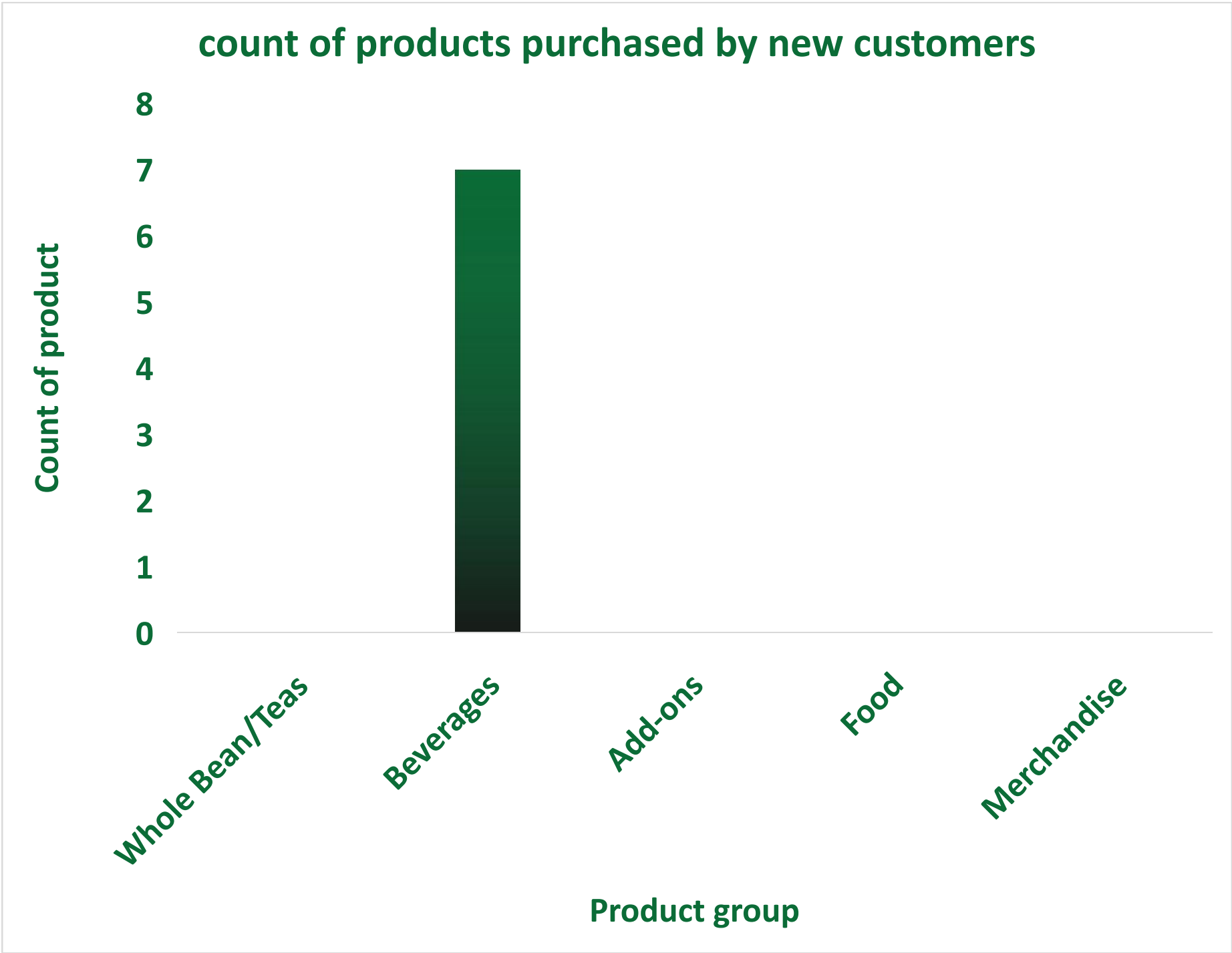
Product group	Total product in group	Count of products purchased by repeated customers
Whole Bean/Teas	21	21
Beverages	47	41
Add-ons	4	4
Food	12	11
Merchandise	4	3

Total product vs Count of product purchase by repeated customer



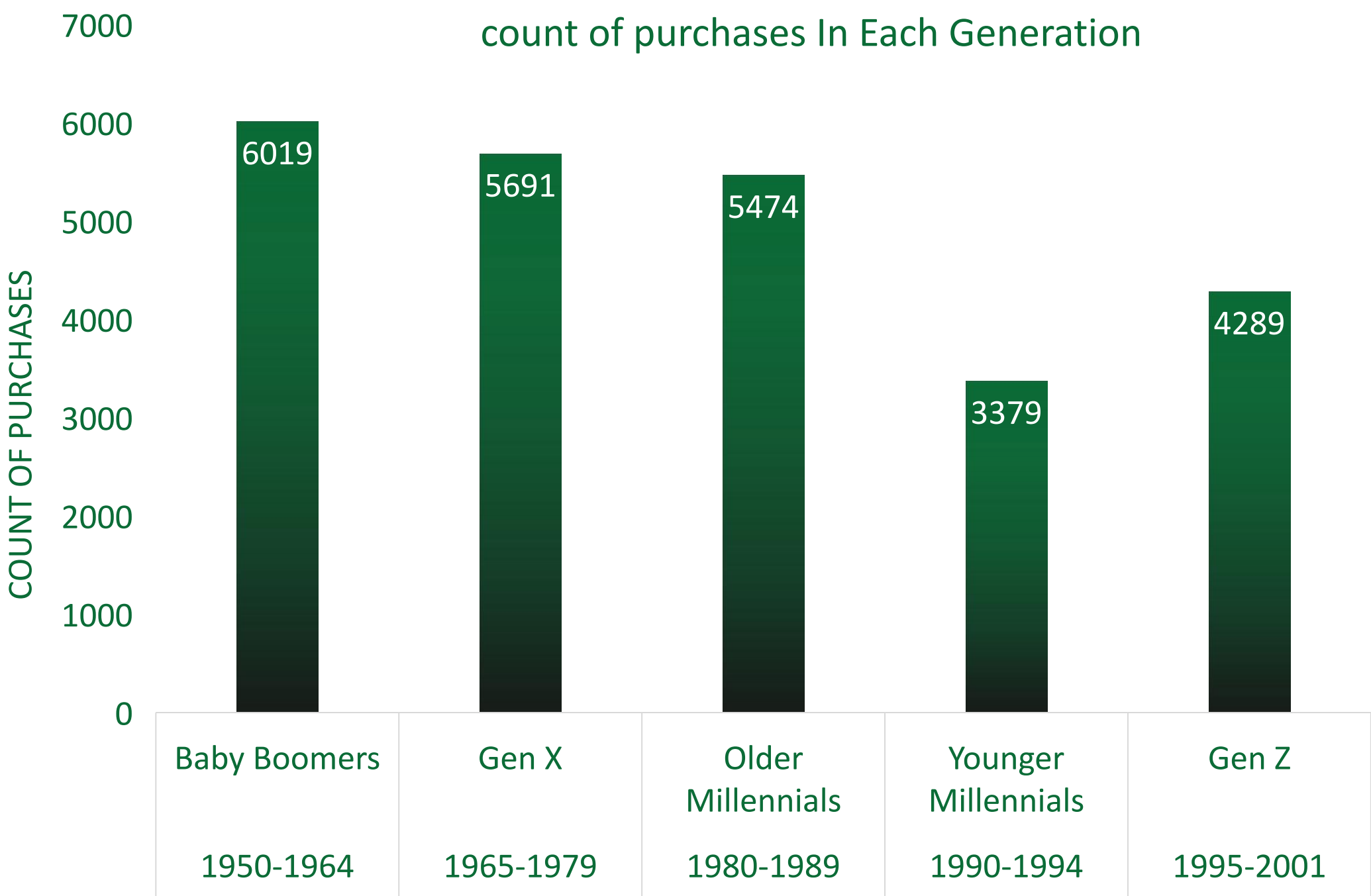
# 5- Count of Products Purchased by new Customers, Segmented by Product Groups

product_group	count of products purchased by new customers
Whole Bean/Teas	0
Beverages	7
Add-ons	0
Food	0
Merchandise	0



# 6- Distribution of Customer purchases Across Different Generation Categories in April 2019

year_range	generation	count of purchases
1950-1964	Baby Boomers	6019
1965-1979	Gen X	5691
1980-1989	Older Millennials	5474
1990-1994	Younger Millennials	3379
1995-2001	Gen Z	4289



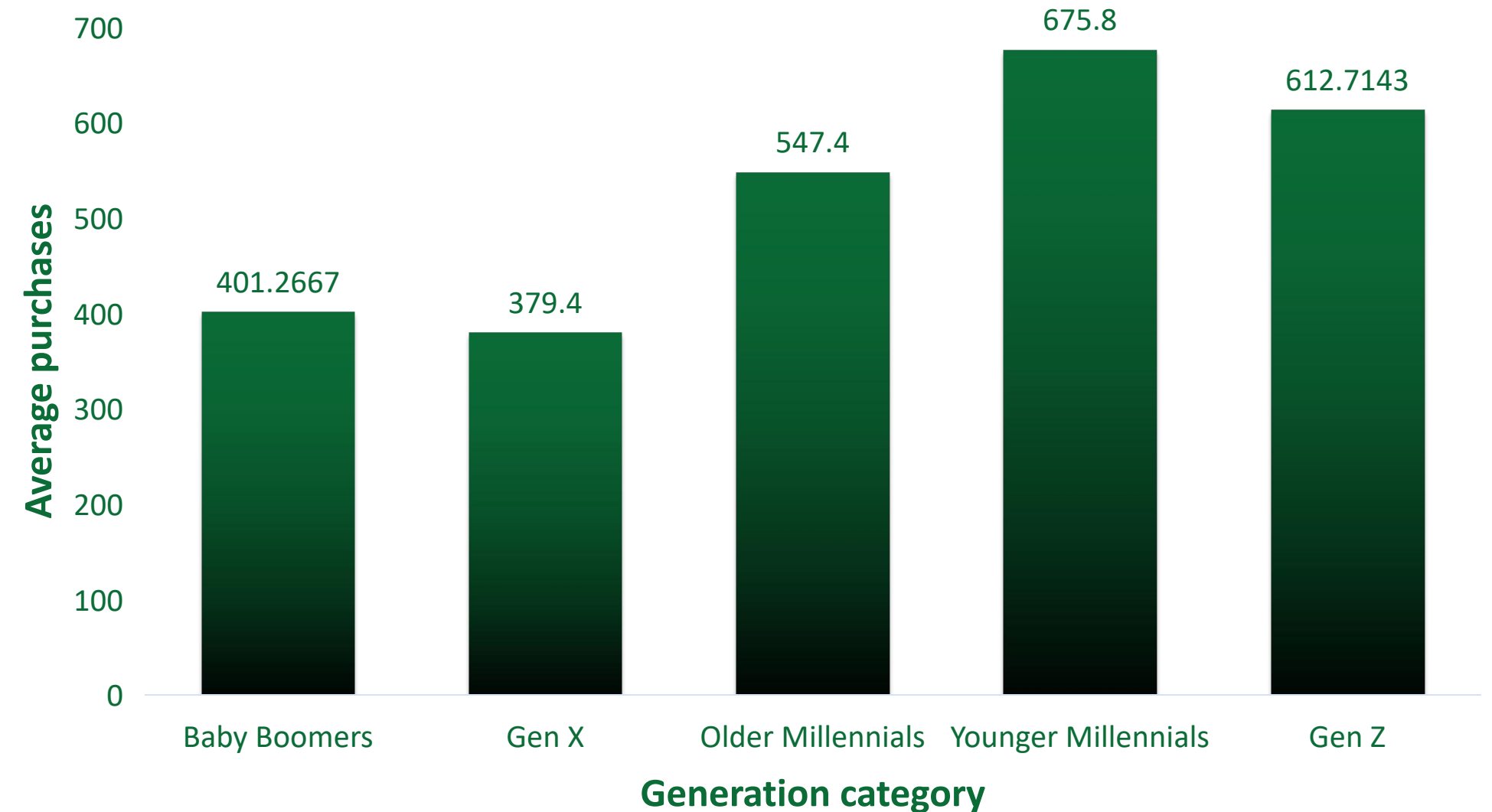
GENERATION CATEGORY AND UNEQUAL CLASS INTERVAL



## 7- Count of avg purchases by customers within each generation category

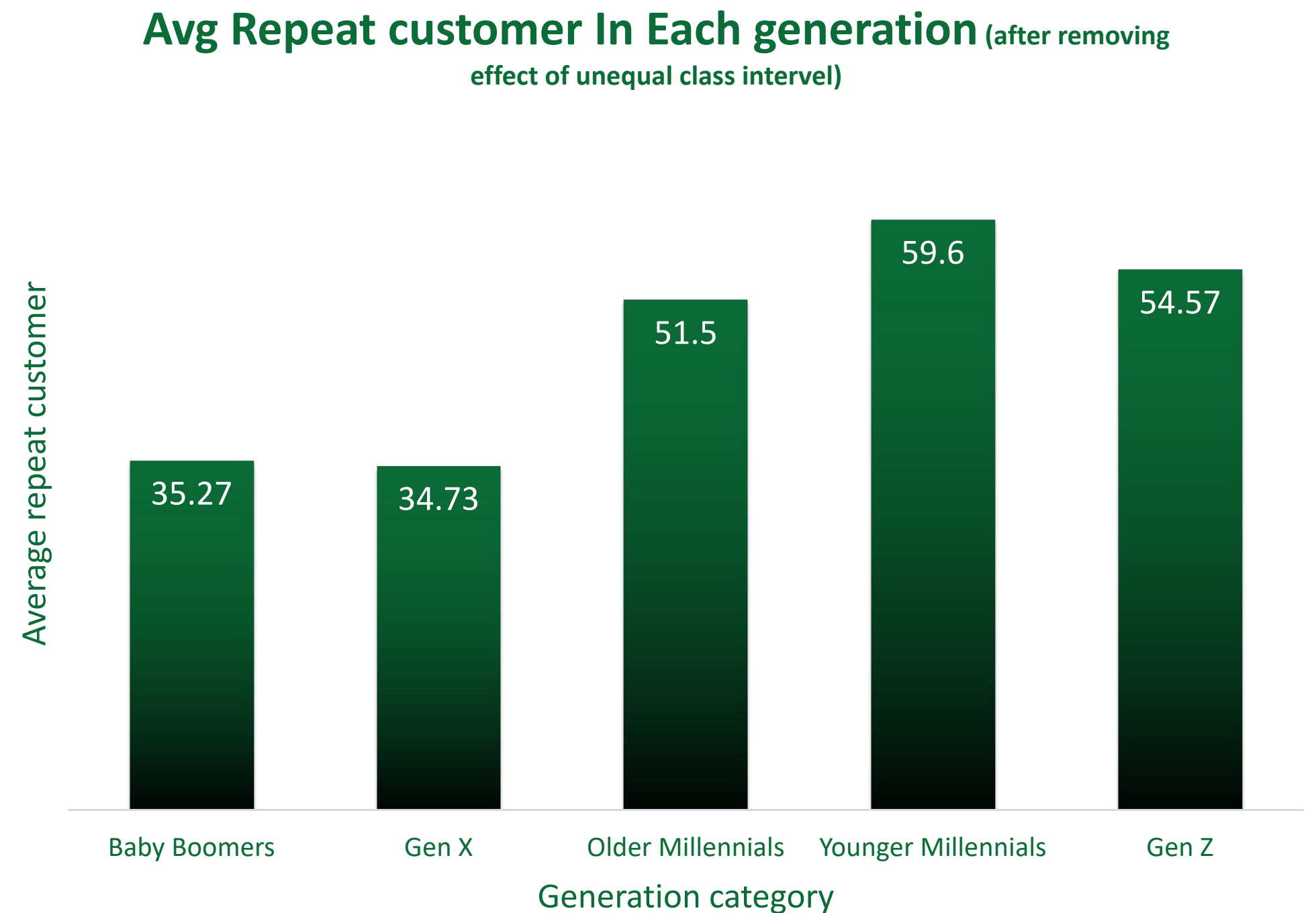
year range	span years	generation	Count of purchase	average purchases
1950-1964	15	Baby Boomers	6019	401.2667
1965-1979	15	Gen X	5691	379.4
1980-1989	10	Older Millennials	5474	547.4
1990-1994	5	Younger Millennials	3379	675.8
1995-2001	7	Gen Z	4289	612.7143

Average purchases In Each Generation (after removing effect of unequal class interval)



## 8- Avg Repeat customer In Each generation (after removing effect of unequal class interval)

year range	span years	generation	no of customer	avg no of customer
1950-1964	15	Baby Boomers	529	35.27
1965-1979	15	Gen X	521	34.73
1980-1989	10	Older Millennials	515	51.5
1990-1994	5	Younger Millennials	298	59.6
1995-2001	7	Gen Z	382	54.57



# RECOMENDATION

## **Sales Outlets Goal Achievement Analysis:**

- Outlet 3 and 8 achieved their goals, while 8 didn't.

## **Further analysis uncovers a key insight.**

- Success traced back to exceptional beverage group performance.
- This success overshadowed weaker performance in other product groups.

## **Strategic Steps for Improvement:**

- Suggest more ambitious targets for the beverage group due to its success.
- Emphasize the need to explore underperformance reasons in other product groups.
- Uncover insights to address weaknesses and achieve balanced growth.

# RECOMENDATION

## **Generation Category Distribution Analysis:**

- Currently most customers belong to the Baby Boomer generation.
- Attributed to the class interval of Baby Boomer category.

## **Equalized class intervals reveal customer distribution.**

- Young Millennials and Gen Z show significant customer numbers.
- Strong probability of Gen Z market size growth in the future.
- Anticipate a decline in the Baby Boomer market.

## **Strategic Steps for Improvement:**

- Focus on future growth potential.
- Highlight 'Gen Z' as a key market.
- Emphasize their growing market size and purchasing power.
- Suggest fostering brand loyalty through effective promotions.

# RECOMENDATION

- Recommend student-friendly deals and product trials.
- Stress the importance of strategic decisions aligned with company goals