**PROJECT REPORT**

1. **Project Title: Financial Performance Report Dashboard (2013-14)**

**Course: Business Analyst Intern**

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1. **Acknowledgement:**

I would like to thank everyone who supported and guided me during this project. Their help made it possible to complete this work successfully.

1. **Abstract**:

The project is about creating a Power BI dashboard to analyze financial performance across different countries, products, and time periods, using key financial metrics such as sales, profit, cost of goods sold (COGS), and discounts using different charts, KPIs, Slicers and Table Matrix.

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2. **Introduction:**

This report outlines the creation and implementation of a **Financial Performance Dashboard** using Microsoft Power BI. The dashboard is designed to consolidate and visualize financial data from multiple sources, providing a clear and interactive representation of an organization’s financial status. Through a range of visual elements such as charts, graphs, and KPI indicators, the dashboard presents essential financial metrics including revenue, expenses, profitability, and cash flow.

By leveraging Power BI’s data transformation and visualization tools, the dashboard enables efficient analysis and real-time monitoring of financial performance. It enhances data transparency, supports financial reporting, and simplifies the interpretation of complex datasets for users at all levels of the organization.

1. **Objectives:**

The primary objective of this project is to transform raw financial data into a dynamic, interactive dashboard that enables stakeholders to monitor and evaluate an organization’s financial health in real time. By integrating key performance indicators (KPIs) such as revenue, expenses, net profit, gross margin, and cash flow, the dashboard offers a comprehensive view of financial trends, variances, and business outcomes.

1. **Tools and Technlogies:**

The project was developed using **Microsoft Power BI Desktop** for data modeling, visualization, and report creation. **Power Query** and **DAX (Data Analysis Expressions)** were used for data transformation, calculations, and KPI development.

1. **Methodology:**

The development of the Financial Performance Dashboard using Microsoft Power BI followed a structured and iterative process to ensure accuracy, usability, and effective data visualization. The methodology can be outlined in the following key phases:

1. **Data Preparation & Setup:**

**Import and understand the dataset.**

Connect to the dataset, ensure all columns are in appropriate data types, and correct any anomalies.

**● Steps:**

* 1. Import the dataset into Power BI.
  2. Click on model view to make relations and after that click on transform data to inspect each column and ensure correct data types (dates, numerical values, categorical data).
  3. Identify missing values and handle them (e.g., imputation, exclusion).
  4. Perform initial inspection and understand unique values in categorical columns (e.g., Segment, Country).
  5. Click on Load data to upload all the data on DATA pane.

1. **Creating New Measures**:

**● Steps:**

1. Go to Modeling Tab and click on Add Measure
2. Measures: Total Revenue, Profit Margin
3. Total Revenue:
4. Profit Margin:



1. **Dashboard Creation:**

**● Steps:**

1. Go to the Visualization pane and take Card(new) and from the data pane drag (one by one) Total Revenue, Sum of Profit and avg unit sold and drop to the visualization pane to get the report.
2. Again, go to the visualization pane, take Table and from the data pane drag these columns to visualization pane to get the report.

A screenshot of a computer

AI-generated content may be incorrect.

1. A screenshot of a computer

   AI-generated content may be incorrect.Again, go to the visualization pane, take Line Chart and from the data pane drag these columns to visualization pane to get the report.
2. go to the visualization pane, take Donut Chart and from the data pane drag these columns to visualization pane to get the report.

A screenshot of a computer

AI-generated content may be incorrect.

1. go to the visualization pane, take Stacked Bar Chart and from the data pane drag these columns to visualization pane to get the report.

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AI-generated content may be incorrect.

1. Again, go to the visualization pane, take Slicer and from the data pane drag these columns to visualization pane. Then, on Data pane click on Date Hierarchy and select month and drop it to the visualization pane.
2. **Analysis & Findings:**

**Overall Financial Performance (2014)**

* Sum of Units Sold: A total of 854K units were sold. This indicates a high volume of sales.
* Total Revenue: The business generated a substantial 98M in total revenue.
* Sum of Profit: The total profit achieved was 13M.
* Profit Margin (Calculated): While not directly displayed, the profit margin for 2014 can be estimated as (13M / 98M) \* 100%, which is approximately 13.26%. This is a reasonable profit margin, though there might be opportunities for improvement.

**Performance by Country**

* The table on the left provides a detailed breakdown of units sold and profit by country for the selected year (2014).
* France:
* Units Sold: 1,86,617
* Profit: ₹29,69,688.62
* United States of America:
* Units Sold: 1,85,147.5
* Profit: ₹24,42,969.82
* Canada:
* Units Sold: 1,85,137.5
* Profit: ₹27,25,557.1
* Mexico:
* Units Sold: 1,50,670
* Profit: ₹23,14,852.85
* Germany:
* Units Sold: 1,46,427
* Profit: ₹25,62,169.35
* Total:
* Units Sold: 8,53,999 (This aligns well with the 854K displayed in the card, with a minor rounding difference.)
* Profit: ₹1,30,15,237.74 (This aligns with the 13M displayed in the card, considering currency conversion and rounding).
* Key Findings from Country-wise Data:
* France leads in Units Sold and Profit: France has the highest number of units sold and also generates the highest profit, making it the top-performing country.
  + Consistent Unit Sales in Top Countries: France, USA, and Canada show very similar unit sales figures, indicating a strong market presence across these regions.
  + Profitability per Unit Varies: While France has the highest profit, Canada, despite similar unit sales to the USA, generates higher profit (₹27.25 lakhs vs ₹24.42 lakhs), suggesting better profit margins or lower costs in Canada.
  + Germany's High Profitability for its Sales Volume: Germany, with fewer units sold compared to Mexico, still manages to generate a higher profit (₹25.62 lakhs vs ₹23.14 lakhs). This suggests strong pricing or cost management in Germany.
  + Mexico and Germany as Lower Volume Markets: These two countries represent lower unit sales volumes compared to the top three, but still contribute significantly to overall profit.

**Total Revenue by Country (Bar Chart)**

* + This chart provides a visual ranking of countries based on their total revenue contribution.
  + United States of America: 21.63M
  + Canada: 21.38M
  + France: 20.13M
  + Germany: 18.19M
  + Mexico: 17.16M
  + Key Findings from Revenue by Country:
  + USA and Canada Lead in Revenue: Contrary to the units sold and profit where France was dominant, the USA and Canada slightly outpace France in terms of total revenue. This could indicate higher average selling prices in the USA and Canada, even if unit sales are similar to France.
  + Revenue vs. Profit Discrepancy: It's important to note the difference between revenue and profit. While the USA and Canada lead in revenue, France leads in profit. This reinforces the idea that profit margin per sale might be higher in France, or costs associated with sales are lower.
  + Consistent Contribution: All five countries contribute significantly to the total revenue, indicating a diversified market presence.

**Sum of Gross Sales by Product (Area Chart)**

* + This chart displays the gross sales performance of different products over time (though the X-axis shows product names rather than a time series, suggesting it's a breakdown by product in descending order of sales).
  + Paseo: Appears to be the highest grossing product (around 29M-30M).
  + VTT: Second highest (around 16M-17M).
  + Amarilla: Third highest (around 15M).
  + Carretera: (around 13M).
  + Velo: (around 13M).
  + Montana: The lowest grossing product (around 12M).

**Key Findings from Product Sales:**

* + Paseo is the Flagship Product: "Paseo" is by far the highest-grossing product, significantly contributing to the overall sales. This product should be a key focus for growth and protection.
  + Product Performance Varies: There's a clear hierarchy in product performance, with "Paseo" leading and "Montana" at the lower end.
  + Tail Products: "Carretera," "Velo," and "Montana" form a group of products with lower gross sales compared to "Paseo" and "VTT." Recommendation: Analyze the profitability of these lower-grossing products. If their profit margins are low, consider strategies for improvement (e.g., promotional activities, cost reduction) or rationalization.

**Monthly Performance (Left Pane)**

* + The left pane shows a list of months from January to December. Since "Year 2014" is selected, this allows for month-over-month analysis. Currently, no specific month is selected, so the main dashboard shows aggregated data for 2014. Recommendation: Clicking on individual months would reveal monthly trends in units sold, revenue, profit, and country/product performance, which is crucial for identifying seasonality, performance dips, or surges.

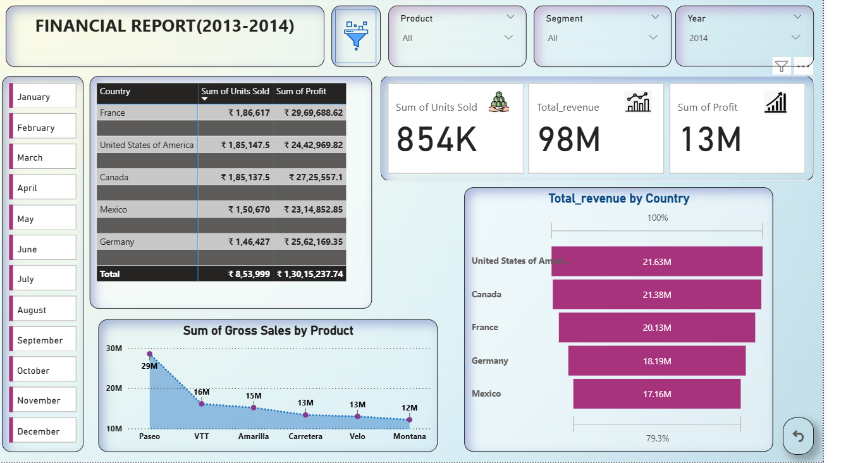
**Filtering and Segmentation**

* + Product Filter: Currently set to "All," allowing an overall view. This filter can be used to deep dive into the performance of specific products.
  + Segment Filter: Currently set to "All," allowing an overall view. This filter can be used to analyze performance across different customer segments (if defined).
  + Year Filter: Currently set to "2014." This allows toggling between 2013 and 2014 data for year-over-year comparison, which is a critical aspect of financial reporting. Recommendation: Analyze year-over-year trends for total revenue, profit, and country/product performance to identify growth areas or declining trends.

**Summary and Recommendations for Project Report:**

* + This dashboard provides a robust snapshot of the company's financial health in 2014.
  + **Strengths:**
* Healthy total revenue and profit.
* Strong performance in key markets like France, USA, and Canada.
* "Paseo" as a clear flagship product driving significant sales.
* Diversified revenue streams across multiple countries and products.
* Areas for Further Investigation & Recommendations:
* Profitability Discrepancies: While the USA and Canada have higher revenue, France yields more profit. Investigate the cost structures and pricing strategies in each country to understand these differences and potentially optimize profitability in the USA and Canada.
  + Product Performance Deep Dive: Conduct a profitability analysis for each product, especially for "Carretera," "Velo," and "Montana." Are they contributing positively to the bottom line, or are they a drain on resources?
  + Defect Rate (if applicable): While not explicitly shown, if there is data on product defect rates or customer returns, correlating it with sales and profit would provide a more complete picture of product quality and its impact on financials.
  + Monthly Trends & Seasonality: Utilize the monthly filter to identify seasonal patterns in sales and profit. This can inform inventory management, marketing campaigns, and staffing decisions.
  + Year-over-Year Comparison: Crucially, compare 2014 data with 2013 (and beyond, if available) to assess growth, identify any stagnation or decline, and understand long-term trends.
  + Customer Segmentation Analysis: If segment data is available and meaningful, analyze how different customer segments contribute to revenue and profit. This can guide targeted marketing efforts.
  + Cost Analysis: While revenue and profit are shown, a deeper dive into cost components (e.g., manufacturing costs, marketing expenses, operational overheads) could reveal further opportunities for efficiency and profit improvement.

**F. Implementation:**



The implementation of the Financial Performance Dashboard using Power BI involved the integration of financial and sales data across multiple dimensions, time, geography, and product category. The goal was to build a centralized, interactive platform that enables dynamic analysis of key financial metrics for the years 2013 and 2014.

**G. Conclusion:**

The Power BI Financial Performance Dashboard successfully consolidates and visualizes key financial data from 2013 and 2014, offering clear insights into revenue, profit, sales trends, and regional performance. By combining interactive visualizations such as KPIs, line charts, donut charts, and bar graphs, the dashboard enables users to quickly interpret complex datasets and monitor business performance in real time.

The implementation of filters, slicers, and year-wise comparisons has enhanced the dashboard's analytical capabilities, allowing decision-makers to assess growth patterns, identify high-performing products and markets, and make data-driven strategic decisions. The intuitive layout and dynamic nature of the dashboard have improved both accessibility and usability for finance teams and executives.

* + 1. **Future Scope:**

To enhance the dashboard’s utility and scalability, several improvements can be considered in future phases:

1. **Multi-Year Analysis:**  
   Extend the dashboard to include data beyond 2014 to track long-term performance and growth trends.
2. **Forecasting & Predictive Analytics:**  
   Integrate time series forecasting models to predict future sales, revenue, and profitability using Power BI's AI capabilities or Python/R scripts.
3. **Expense and Cost Analysis:**  
   Incorporate detailed cost components and expense breakdowns to assess net profit margins more comprehensively.
4. **Drill-Through Functionality:**  
   Add drill-through pages to enable users to explore transaction-level data for deeper insights into specific products, regions, or months.
5. **Mobile Optimization:**  
   Adapt the dashboard layout for mobile and tablet views, enabling real-time access on-the-go for executives.
6. **Integration with Live Data Sources:**  
   Connect the dashboard to live databases or cloud-based accounting systems (e.g., SAP, QuickBooks) for automated, real-time updates.
7. **User Role-Based Views:**  
   Implement row-level security to provide customized views for different users based on their roles (e.g., finance managers, regional heads, executives).