

**SALES DATA**

**ANALYSIS REPORT**

**I N S I G H T S   B Y   :   S H U B H A M   S A X E N A**

# Problem Statement

- In a fintech company, employees received data via email every hour.
- A dedicated team of 10 resources was responsible for downloading this data, cleaning and processing it, identifying any data issues, and consolidating all the hourly data.
- They created visually appealing Excel reports and manually sent these reports to relevant stakeholders.
- This manual process was time-consuming and resource-intensive, significantly impacting the organization's efficiency.

# Problem Solution

- To address these challenges, the company decided to migrate to Power BI.
- The project aims to automate the data handling process by leveraging Power BI to fetch email attachments directly without manually opening each email.
- These attachments, which could be in various formats such as Excel, CSV, PDF, or JSON, will be cleaned, combined, and visualized in Power BI dashboards.
- The automated process will then send these dashboards to stakeholders, including managers, team leaders, clients, or any end-users.

# Objectives

## 1. Automate Data Collection

Eliminate manual downloading of email attachments by automatically fetching data from emails.

## 2. Data Cleaning and Processing

Streamline the cleaning and processing of collected data to ensure accuracy and consistency.

## 3. Data Consolidation

Efficiently combine data from multiple sources and formats (Excel, CSV, PDF, JSON) into a single cohesive dataset.

## 4. Create Visual Dashboards

Develop interactive and visually appealing dashboards in Power BI to represent the consolidated data

## 5. Improve Efficiency

Reduce time and resource consumption by automating repetitive tasks, thus enhancing overall organizational efficiency.

## 6. Real-Time Reporting:

Provide stakeholders with up-to-date and accurate reports without the need for manual intervention.

## 7. Scalable Solution

Implement a scalable solution that can handle large volumes of data and adapt to future needs.

## 8. Enhance Data Accessibility

Ensure that data insights are easily accessible to managers, team leaders, clients, and other end-users.





2744 ▲ 760.4090000000001

Wyoming 1603.136 ▲ 100.196

South Dakota 1315.56 ▲ 394.82830000000007

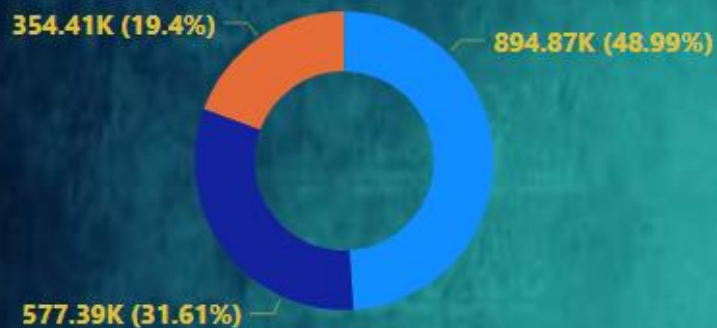
West Virginia 1209.824 ▲

# Sales Analysis Report



## Segment-wise Sales

Segments : ● Consumer ● Corporate ● Home Office



Total Sales  
**2M**



Total Profit  
**225K**



Total Quantity  
**30K**

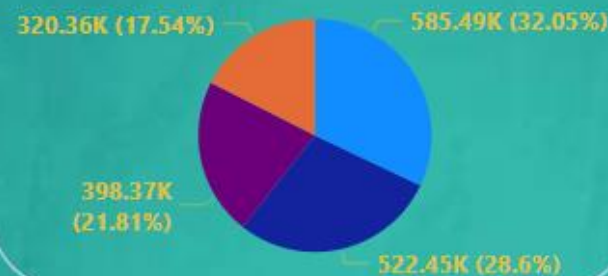


Top Product  
**TEC-CO-10004722**

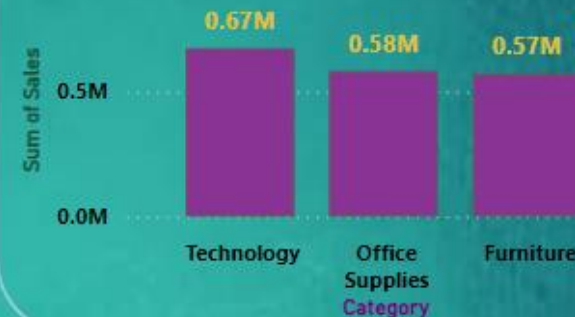


## Region-wise Sales

Region ● West ● East ● Central ● South



## Category-wise Sales



## Filters

Year

2020

2021

2022

Region

Central

East

South

West

Month

All

Segment

All

Sub-Category

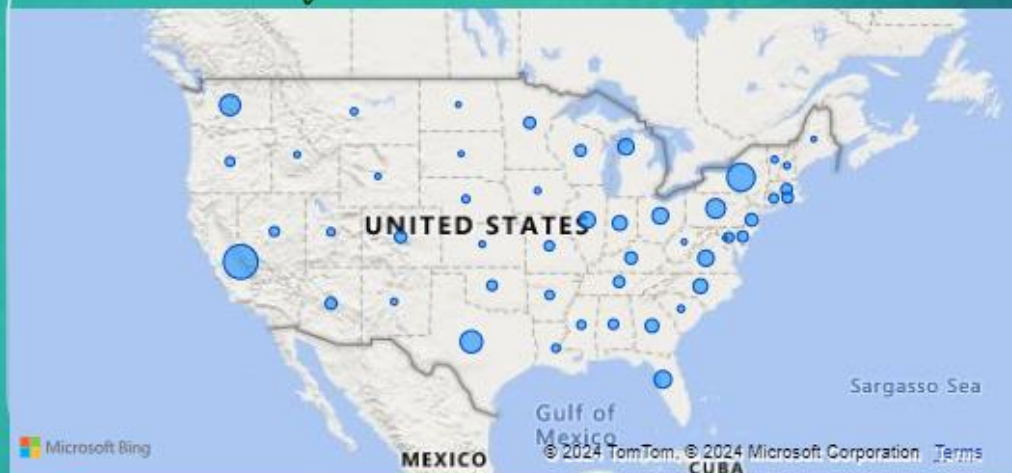
All



## Sub Category-wise Sales



## State-wise Sales



Developed by Shubham Saxena

# Key Insights

Year	Total Sales	Total Profit	Total Quantity	Top Performer
2020	609K	82K	9835	TEC-CO-10004722
2021	733K	93K	12K	TEC-CO-10004722
2022	485K	50K	7583	TEC-MA-10002412

## Overall Performance

- **Total Sales:** There was a notable fluctuation in total sales over the three years. Sales peaked in 2021 at 733K, showing a significant increase from 609K in 2020, but then dropped sharply to 485K in 2022.
- **Total Profit:** Profit followed a similar trend, with a peak in 2021 at 93K, up from 82K in 2020, but it decreased to 50K in 2022.

## Sales and Profit Trends 2020-2021

- **Sales Increase:** There was a 20.4% increase in total sales (from 609K to 733K).
- **Profit Increase:** Profit increased by 13.4% (from 82K to 93K).

## Quantity Sold

- **The total quantity sold** also increased by 22.1% (from 9835 to 12K units).
- **Sales Decrease:** There was a significant 33.8% decrease in total sales (from 733K to 485K).
- **Profit Decrease:** Profit dropped by 46.2% (from 93K to 50K).
- **Quantity Sold:** The total quantity sold decreased by 36.8% (from 12K to 7583 units).

## Top Performer Analysis

- **Consistent Top Performer (2020-2021):** TEC-CO-10004722 was the top performer for both 2020 and 2021, indicating strong and consistent performance during these years.
- **Change in Top Performer (2022):** TEC-MA-10002412 became the top performer in 2022, reflecting a shift in top sales contributors.

# Summary of Key Insights:

**Strong Year in 2021:** The company experienced its best performance in 2021 across all metrics—total sales, total profit, and total quantity sold.

**Decline in 2022:** There was a noticeable decline in 2022 in terms of sales, profit, and quantity, suggesting potential market challenges or internal issues that need addressing.

**Consistent Performance by Top Performer:** TEC-CO-10004722 demonstrated strong performance for two consecutive years, highlighting its importance to the company's sales strategy.

**Shift in Performance Dynamics:** The emergence of TEC-MA-10002412 as the top performer in 2022 indicates a shift in the market or product dynamics, which could be investigated further for strategic insights.

# Actionable Recommendations:

**Investigate Decline in 2022:** Conduct a detailed analysis to understand the reasons behind the significant drop in sales, profit, and quantity in 2022. This could include market conditions, competition, supply chain issues, or changes in customer preferences.

**Focus on Consistent Top Performers:** Leverage the strategies and practices that made TEC-CO-10004722 a consistent top performer to boost overall sales and performance.

**Support New Top Performers:** Analyze the factors contributing to TEC-MA-10002412's rise to the top performer in 2022 and explore opportunities to replicate this success across other products or regions.

**Adjust Marketing and Sales Strategies:** Based on the insights from the top performers and sales trends, adjust marketing and sales strategies to align with the changing dynamics and maximize sales potential in 2023.



# Recommendations for Report Enhancement





**THANK YOU**