Contoso Sales Performance Dashboard: Project Requirements Summary

Problem Statement

Contoso needs a cohesive, real-time view of global sales performance, profitability, and product returns. Without a centralized dashboard, stakeholders lack the immediate ability to identify high-performing segments, diagnose profitability issues, and optimize inventory based on return rates, leading to inefficient resource allocation and missed revenue opportunities.

Objectives

Deliver an interactive dashboard that consolidates key sales, profit, and quantity metrics. The primary goal is to provide a comprehensive, sliceable view that allows leaders to quickly understand performance across different product categories, time periods, regions, and customer classes.

Key Questions Answered by the Dashboard

- **Overall Financial Performance:** What is the **Total Profit**, **Total Sales Quantity**, and **Total Return Amount**, and how do these metrics compare against targets (implied by the data visuals)?
- **Product Segmentation:** Which **Product Categories** are driving the highest **Sales Amount** and generating the most **Profit**? Are there any categories with high sales but low unit cost/profit?
- **Geographic Contribution:** How is the overall **Profit distributed across different continents** (North America, Asia, Europe), and which specific **Region/Country** is underperforming?
- **Customer Value Analysis:** How does the **Sales Amount** trend across different customer **ClassNames** (**Regular, Deluxe, Economy**), and what does this relationship imply about product pricing or customer loyalty?
- **Time & Trend Analysis:** What are the year-over-year **Sales Analysis** trends, and are there any significant dips or peaks that require further investigation (e.g., between 2010 and 2012)?

Tools & Interaction Requirements

- **Platform:** Microsoft Power BI
- **Slicers:** The dashboard must be filterable by **Manufacturer**, **Product Category**, and **Region/Country Name** to allow for dynamic, granular analysis.
- **Measures:** Require DAX measures for `Total Profit`, `Sales Quantity`, `Return Amount`, and potentially time intelligence (Year-over-Year changes, etc.) to drive the card visuals.