

# Data-Driven Storytelling Presentation:

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## **Account Performance Analysis & Sales Trend**

By  
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# Introduction

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## Problem Statement

- J.P. Morgan Chase & Co., a leading global financial services firm, operates on a worldwide scale, offering a diverse range of services.
- The company seeks to conduct a comprehensive analysis of account performance metrics over the past five years (2017-2021) to understand the factors contributing to its compound annual growth rate (CAGR) in unit sales.

## Business Objectives

- Examine the total unit sales for each year within the specified period.
- Analyze the year-over-year growth in sales.
- Identify which account types are outperforming others in terms of unit sales.
- Calculate the average 5-year compound annual growth rate (CAGR) across different account types.

# Data Modelling

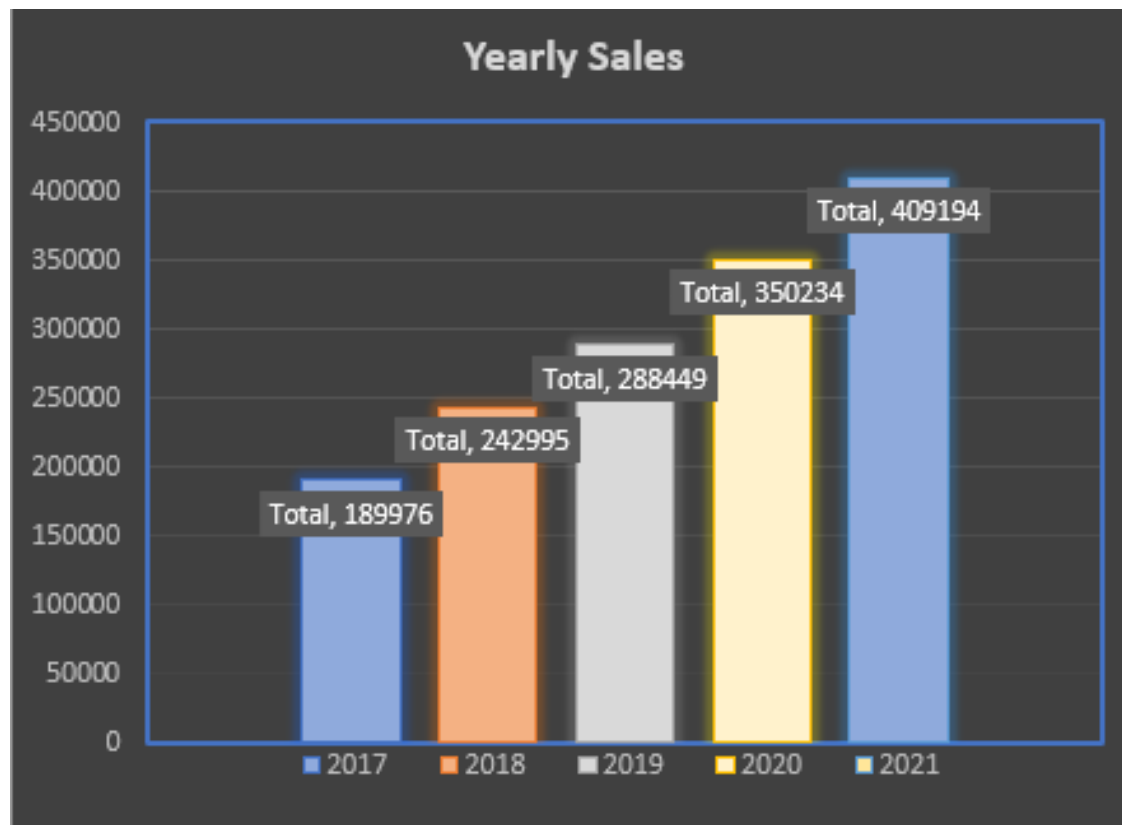
Utilizing Power Query in MS-Excel, transformed the data for improved organization, giving a more structured foundation for necessary analysis.

Account No.	Account Address	Decision Maker	Phone Num.	Account Type	Product Lines			Marketing / Promotion Programs				Product Sales Volume (units)					
					Product 1	Product 2	Product 3	Social Me	Coupo	Catalog Inclu	Poste	2017	2018	2019	2020	2021	5 YR CA
SB 1	2131 Patterson Road, Brooklyn NY 11201	Dorothy Rizzo	(880) 283-6803	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1982	5388	7063	7208	9093	46%
SB 2	3685 Morningview Lane, New York NY 10013	Lawson Moore	(711) 426-7350	Small Business	Yes	Yes	Yes	No	Yes	Yes	Yes	2786	3804	4121	6210	6909	25%
SB 3	2285 Ladybug Drive, New York NY 10013	Vin Hudson	(952) 952-5573	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	1209	1534	1634	4302	9768	69%
SB 4	2930 Southern Street, New York NY 10005	Susana Huels	(491) 505-6064	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	906	1251	2897	4499	9428	80%
SB 5	2807 Geraldine Lane, New York NY 10004	Shanna Hettinger	(412) 570-0596	Small Business	Yes	Yes	No	Yes	Yes	Yes	Yes	1421	1893	2722	4410	5873	43%
SB 6	7778 Cherry Road, Bronx NY 10467	Roy McGlynn	(534) 807-4187	Small Business	Yes	Yes	Yes	No	Yes	Yes	No	2341	6105	7777	7891	8758	33%
SB 7	48 Winchester Avenue, New York NY 10024	Lorena Posacco	(678) 294-8103	Small Business	Yes	No	No	No	No	Yes	No	9252	8499	991	448	211	-61%
SB 8	8735 Squaw Creek Drive, Brooklyn NY 11214	Juanita Wisozk	(305) 531-1310	Small Business	Yes	No	Yes	Yes	No	Yes	No	1581	4799	6582	9024	9759	58%
SB 9	267 Third Road, New York NY 10034	Velma Riley	(697) 543-0310	Small Business	Yes	No	No	No	No	Yes	No	9766	8049	5556	5202	2373	-30%
SB 10	102 Coffee Court, Bronx NY 10461	Holly Gaines	(277) 456-4626	Small Business	Yes	Yes	No	Yes	No	Yes	No	1530	1620	2027	4881	6002	41%
SB 11	44 W. Pheasant Street, Brooklyn NY 11233	Gary Brown	(459) 968-9453	Small Business	Yes	No	No	No	No	No	No	7555	6551	5188	3436	2359	-25%
SB 12	7488 N. Marconi Ave, Brooklyn NY 11237	Jeffrey Akins	(313) 417-8968	Small Business	Yes	No	No	No	No	No	No	1532	2678	4068	4278	5382	37%
SB 13	9575 Shipley Court, Brooklyn NY 11201	Tim Young	(876) 653-1727	Small Business	Yes	No	Yes	Yes	Yes	Yes	Yes	24	1797	3548	3668	8592	335%
SB 14	8156 Lake View Street, New York, NY 10025	Debra Kroll	(628) 832-4386	Small Business	Yes	Yes	Yes	Yes	Yes	Yes	Yes	861	1314	1810	6510	9271	81%
SB 15	44 Madison Dr, New York NY 10032	Kelly Boyd	(220) 929-0797	Small Business	Yes	Yes	No	No	No	No	No	9058	4839	4776	4024	369	-55%
MB 1	9848 Linden St, New York NY 10011	Dan Hill	(248) 450-0797	Medium Business	Yes	Yes	No	No	No	No	No	3501	7079	7438	7443	9225	27%
MB 2	805 South Pilgrim Court, Brooklyn NY 11225	Javier George	(964) 214-3742	Medium Business	Yes	Yes	No	No	No	No	No	3916	4218	5072	5201	7588	18%
MB 3	9132 Redwood Rd, Bronx NY 10466	Christopher Evans	(831) 406-6300	Medium Business	Yes	Yes	No	Yes	No	Yes	No	700	5721	6247	8495	9236	91%
MB 4	3 Warren Drive, New York NY 10040	Julie Ross	(778) 387-0744	Medium Business	Yes	Yes	No	No	No	No	No	9773	9179	8390	8256	3815	-21%
MB 5	402 Bridgeton Lane, Bronx NY 10468	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	73	3485	4592	5143	8100	225%
MB 6	6 E. Nichols Ave, New York NY 10027	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	238	1235	1822	7074	8207	142%
MB 7	323 North Edgewood St, Bronx NY 10457	Charlotte Leroux	(784) 634-6873	Medium Business	Yes	Yes	No	Yes	No	Yes	No	1368	3447	4535	5476	9983	64%
MB 8	484 Thorne St, New York NY 10128	Nina Coulter	(938) 752-9381	Medium Business	Yes	No	No	No	Yes	No	No	8331	7667	5952	1998	375	-54%
MB 9	861 Gonzales Lane, Bronx NY 10472	Mia Ang	(253) 861-1301	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	1779	2124	2844	6877	9570	52%
MB 10	267 Randall Mill Dr, New York NY 10033	Kathy Rogers	(939) 738-6471	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	570	1322	7279	8443	9571	102%
MB 11	12 Lees Creek St, Brooklyn NY 11211	Rita Varga	(754) 696-3109	Medium Business	Yes	No	No	No	Yes	No	No	6156	6110	5791	1759	969	-37%
MR 12	240 W. Manhattan St, Bronx NY 10462	Mal Rarkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	209	621	3098	7118	8433	152%

# Data Analysis & Visualization

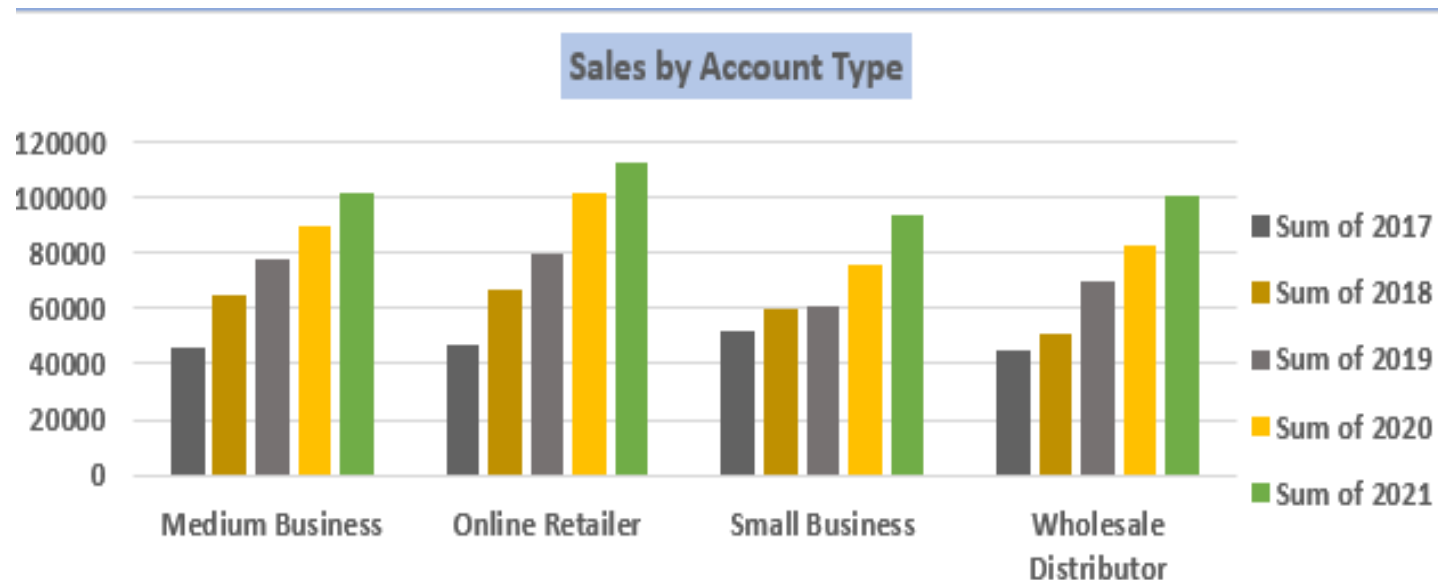
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Overall, our unit sales growth has been good, with a 5- year CAGR of 21%



# Data Analysis & Visualization

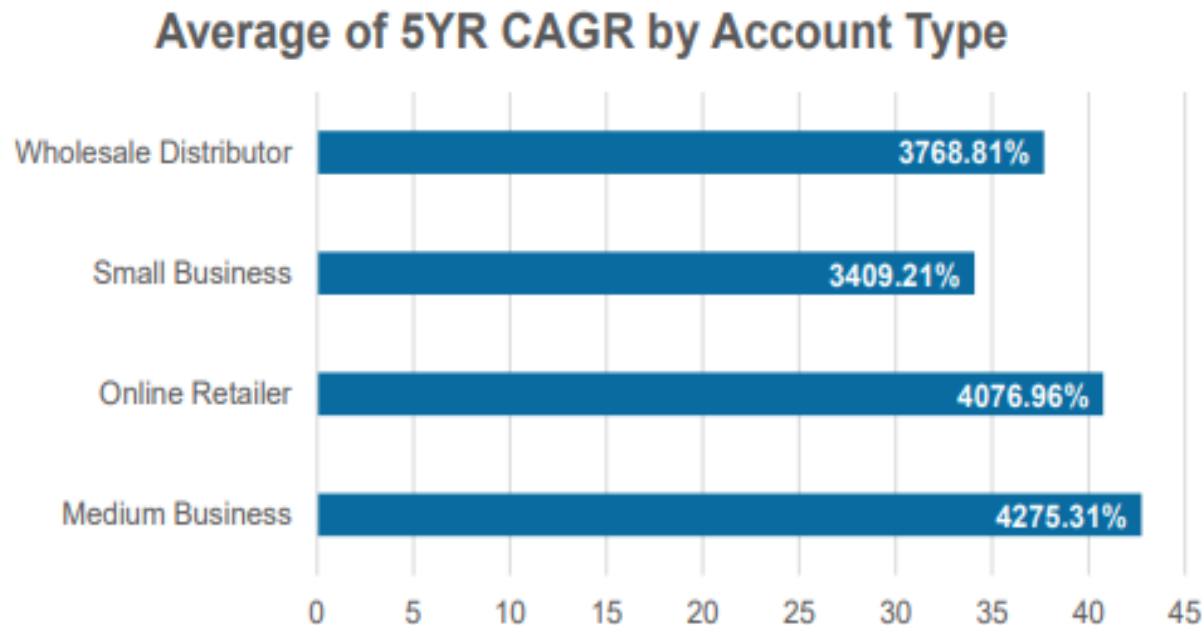
Directing our sales resources and adjusting our sales mix towards online retailer accounts could lead to enhanced sales growth.



# Data Analysis & Visualization

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However, **Medium Business** account type is experiencing higher profitability driven by the average 5-year CAGR

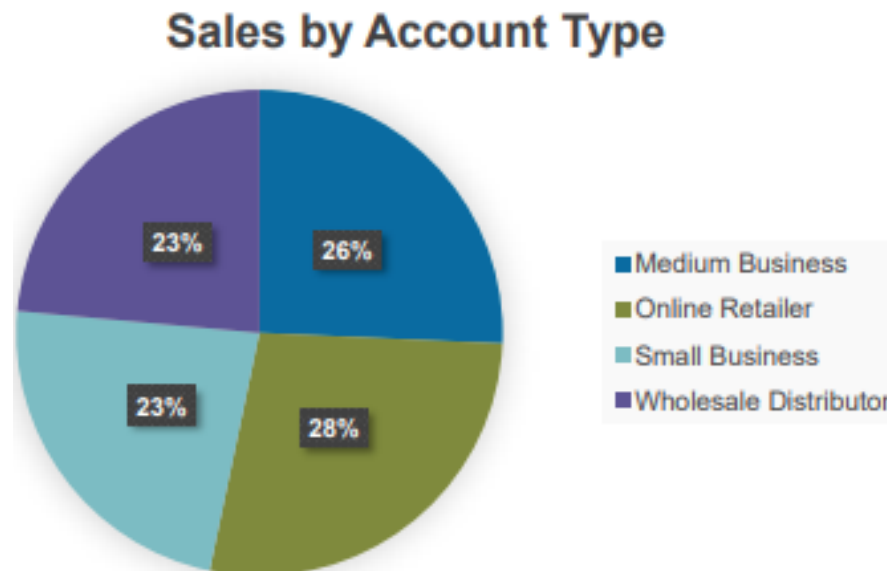


# Data Analysis & Visualization

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**Online Retailer** generated the highest sales volume, totaling **408,515 units**, which accounts for **28%** of the total sales volume.

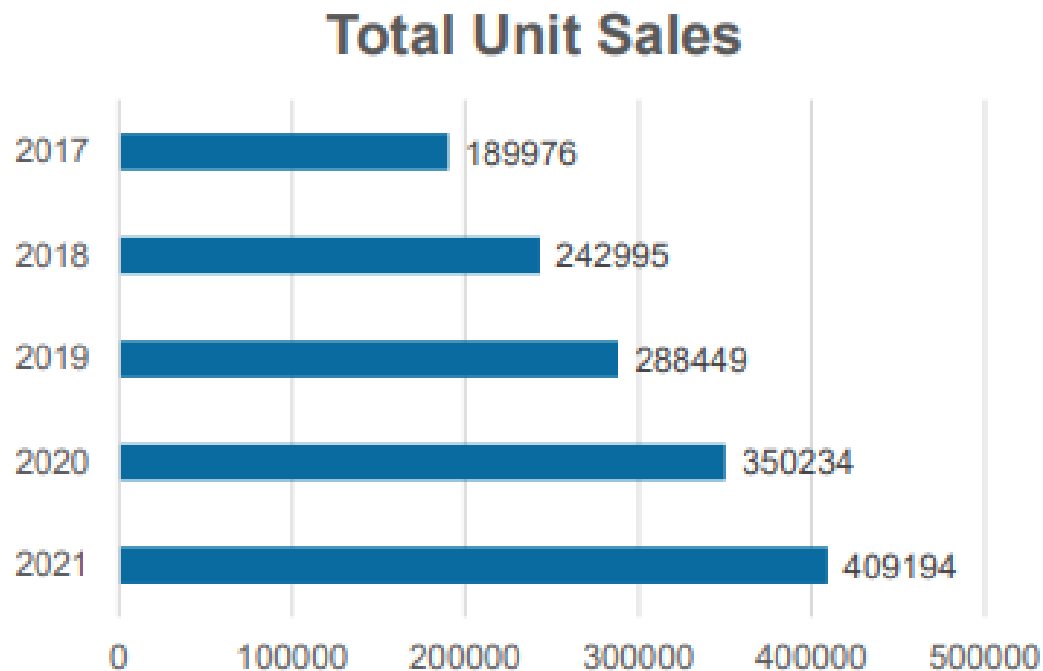
**Medium Business** followed closely with a sales volume of **380,568 units**, making up **26%** of the total sales volume.



# Data Analysis & Visualization

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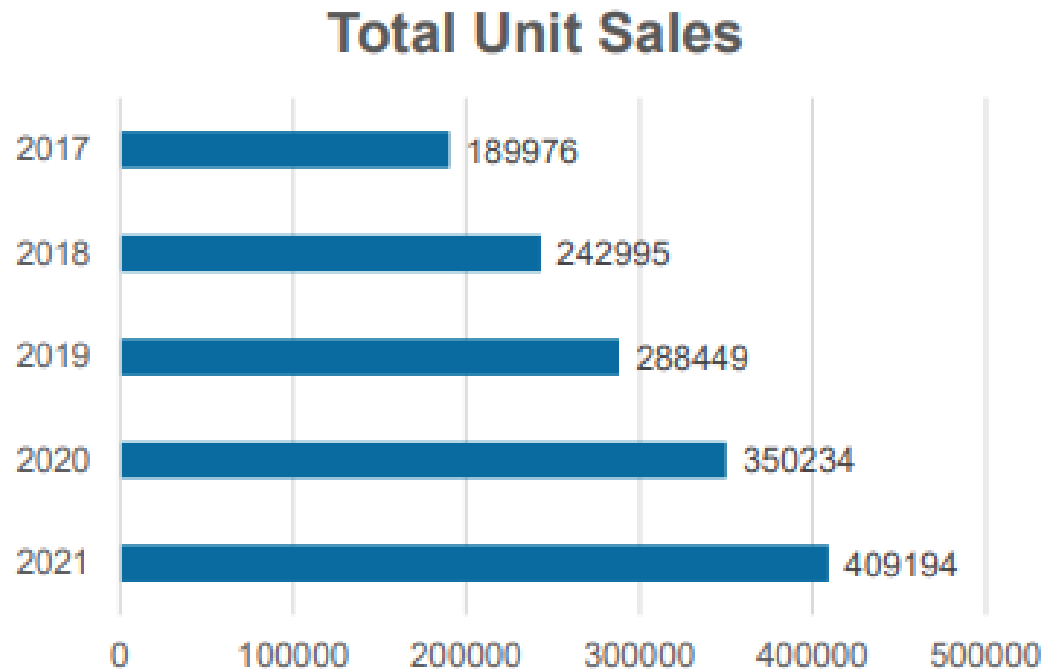




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# Summary

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- While overall sales are doing well, there's a lot of potential for improvement.
- By discontinuing accounts that aren't performing well, we can free up important sales and marketing resources.
- Over the past five years, the online retailer category has seen the strongest growth.
- Redirecting the resources from underperforming accounts to focus on high-potential online retailer accounts could significantly boost sales.
- We should act quickly to close these underperforming accounts and start identifying online retailer accounts that would benefit from more sales and marketing attention.