**MS EXCEL PROCESS**

1. The Column named **transaction\_date** was formatted as numbers; this is reformatted to a date format.
2. The Column named **unit\_price** is formatted into two decima places.
3. A column is inserted immediately after the **transaction\_date** column, this was named **months** with a formular that relates with the transaction date.

FORMULAR , TEXT(B2, “MMMM”), where B2 is the corresponding transaction date column.

1. A column is inserted immediately after the **product\_detail** column, this was named **sales\_amount** with a formular that relates with **unit\_price** and **transaction\_qty.**

FORMULAR , (**unit\_price** \* **transaction\_qty**).

1. All columns were checked for blanks with the aid of filter and no blank was noticed in any of the columns.
2. Data was checked for necessary duplicates, and **THE DATASET HAVE NO DUPLICATES**. The process for this is by clicking **data** in the ***Ribbon tabs***, and selecting **remove duplicates** under the **data tools** in ***Ribbon group***. A box appears, and from the box, check my data have headers and then select all the columns and then click **OK.**

**POWER BI PROCESSES**

**RE: INSIGHT AND RECOMMENDATION FOR MAVEN COFFEE (COFFEE SHOP SALES).**

Analysis of the dataset provided reveal the following:

1. **THE KEY ELEMENTS IN THE DATA**
   1. **PERIOD:** The information provided is for the half year ended **30th June 2023**.
   2. **SALES:** Total sales for this period is **$698,812.33.**
   3. **STORE LOCATIONS:** The company operates through **3 locations** during this period.
   4. **PRODUCT TYPES**: Products available to the customers were of **29 types.**
   5. **PRODUCT CATEGORIES:** The available products are categorized into **9.**
   6. **QUANTITY SOLD:** Total quantity sold during this period is **214,470.**
2. **INSIGHTS**

We are going to review the company performance in term of **sales** and numbers of quantity sold.

In doing this we will review these elements through the shop locations, product types and the product categories.

***One major observation is that information relating with customers of the company is not made available , hence we are unable to review the performance of the company via customer performance*** .

* 1. **INSIGHT ON SALES REVENUE:**
     1. **SALES FROM LOCATIONS**

There were three (3) locations through which the customers of Maven Coffee were attended to. (1) Astoria, (2) Lower Manhattan and (3) Hell's Kitchen. Total sales from this location are as follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SALES FROM LOCATIONS** | | | | |
|  | **ASTORIA** | **Lower Manhattan** | **Hell's Kitchen** | **Total** |
| **TOTAL SALES** | ***$232.243.91*** | ***$230,057.25*** | ***$236,511.17*** | **$698,812.33** |

The difference in total sales from these locations is not relevant, as each of the three locations did about **33%** of total of sales.

* + 1. **SALES BY PRODUCT TYPES**

The product offering of Maven Coffee are classified into **29** types. We discovered that out of the total sales revenue of **$698,812.33** generated by the 29 types, Sales of **$340,938.75** was generate from Sales of items from **4** types. This means that **48.74%** of the total sales was generated by 4 types namely: (1) Barista Espresso, (2) Brewed Chai tea, (3) Hot chocolate and (4) Gourmet brewed coffee.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SALES FROM PRODUCT TYPES (4** out of the **29** types contributed **48.74%** of the sales**)** | | | | | |
|  | **Barista Espresso** | **Brewed Chai tea** | **Hot chocolate** | **Gourmet brewed coffee** | **Total** |
| **TOTAL SALES** | ***$91,406.20*** | ***$77,081.95*** | ***$72,416.00*** | ***$70,034.60*** | **$340,938.75** |

We believe effort should be concentrated on those product types that contributed more to the business.

* + 1. **SALES BY PRODUCT CATEGORIES**

The product offering of Maven Coffee are classified into **9** categories. **3** out of these **9** categories, contributed **78.52%** of the total sales. Sales of **$548,674.04** out of the of the **$698,812.33** revenue, were generated by the 3 categories.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SALES BY PRODUCT CATEGORIES** | | | | |
|  | **COFFEE** | **TEA** | **BAKERY** | **TOTAL** |
| **TOTAL SALES** | ***$269,952.45*** | ***$196,405.95*** | ***$82,315.64*** | **$548,674.04** |

* 1. **INSIGHT ON NUMBER OF QUANTITY SOLD:**
     1. **QUANTITY SOLD FROM LOCATIONS:**

The difference in quantity sold from these locations is not insignificant.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **QUANTITY SOLD BY STORE LOCATIONS** | | | | |
|  | **ASTORIA** | **Lower Manhattan** | **Hell's Kitchen** | **Total** |
| **QUANTITY SOLD** | ***70,991*** | ***71,742*** | ***71,737*** | **214,470** |

* + 1. **QUANTITY SOLD BY PRODUCT TYPES**

**4** out of the 29 product types sold 94,623 quantities out of the 214,470 sold by the company, this represents **44.12%.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SALES FROM PRODUCT TYPES** | | | | | |
|  | **Barista Espresso** | **Brewed Chai tea** | **Hot chocolate** | **Gourmet brewed coffee** | **Total** |
| **QUANTITY SOLD** | ***24,943*** | ***26,250*** | ***17,457*** | ***25,973*** | **94,623** |

* + 1. **QUANTITY SOLD BY PRODUCT CATEGORIES:**

The product offering of Maven Coffee are classified into **9** categories. **3** out of these **9** categories, sold **84.95%** of the total quantity sold for the period. Total quantity sold was **214,470,** and the 3 categories sold **182,201.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SALES BY PRODUCT CATEGORIES** | | | | |
|  | **COFFEE** | **TEA** | **BAKERY** | **TOTAL** |
| **QUANTITY SOLD** | ***89,250*** | ***69,737*** | ***23,214*** | **182,201** |

* 1. **INSIGHT ON SEASONS AND PERIOD OF SALES:**
     1. **SALES REVENUE BY WEEKS OF OPERATION**

There were 26 weeks in the period under review and we observed that as the week progresses, there is a noticeable improvement in the value of sales revenue generated by the company.

* + 1. **SALES REVENUE BY MONTHS OF OPERATION**

Apart from in the month of February, where a slight drop in sales was noticed, the company had experience a sustained progressive sales revenue monthly.

* + 1. **SALES REVENUE BY QUARTERS OF OPERATION**

Sales generated in the first quarter is $256,657.61, while $442,154.72 was generated in the second quarter. This follows the pattern observed in our week-by-week analysis.

1. **CONCLUSSION: SUGGESTED ACTION PLAN**

In conclusion we are of the opinion that the company should review the following :

* The company should work on reducing the product types from the current 29, and concentrate more on the high-volume product types. Efforts should be increased on Barista Espresso, Brewed Chai tea, Hot chocolate and Gourmet brewed coffee. While the continuity of products type like Green beans, Green tea, House blend beans, organic Chocolate and Clothing should be review.
* As a noticeable progressive week-on-week sales revenue has been recorded by the company, we advise the company to conduct a customer survey on customer satisfaction, so that they can understand the need of the customers and the challenges faced by the customers. All the challenges should be addressed and the things the liked and wanted should be continued with improvements.

Thank you,

Sunday Ola Emmanuel OBIKOYA