SALES DASHBOARD

Surekha Berlin

PROBLEM STATEMENT

An ABC company has the sales data for the last 3 years and they want to analyze it now. Based on the data set given, try to create a dashboard.

Include important KPIs

- Sales over Time

- Sales for various Products

- Manager wise analysis

- Customer coverage across different Locations

- Target Analysis

WHAT IS A SALES DASHBOARD?

A sales dashboard is a tool designed to provide sales teams with a comprehensive, real-time view of their performance by visually displaying key sales metrics and data.

The dashboard provides an at-a-glance view of your sales team's performance. Sales teams operate in a fast-paced, target-oriented environment. Data-driven sales managers and reps closely monitor their individual and team performance daily so they can adjust or improve their strategies in real-time.

HOW TO CREATE SALES DASHBOARDS

All dashboards are built on the principle of pulling sales data into the platform and providing the sales reps with a visual representation of that data. Here's a simple checklist for creating a sales KPI dashboard:

1. Identify the sales metrics and KPIs you need to monitor to make data-driven decisions

2. Identify where that data currently resides (CRM, Excel, Google Sheets, HubSpot, Salesforce)

3. Determine how you want to view your dashboard (TV dashboard, mobile, or desktop dashboard)

4. Evaluate a dashboard software vendor based on your requirements

5. Pull data from your data services into the dashboard

6. Choose appropriate visual representations for your dashboard

7. Share the dashboard with your team and sales executives to encourage the adoption

WHAT IS A SALES TARGET?

A sales target is a specific goal or objective set by a company or individual for the number of products or services they aim to sell within a given time. Sales targets are often used to track performance and motivate sales teams. Targets can be set by revenue, units sold, or customer acquisition and are adjusted based on market conditions. Achieving sales targets is critical for a company's success and can impact revenue, profitability, and market share. Sales targets can also be used to evaluate performance and incentivize sales personnel.

SALES TARGET ATTAINMENT FORMULA

(Sales for the current period/Sales target)x100

OVERVIEW

MONTH
All ▼

SALESPERSON
All ▼

SUPERVISOR
All ▼

TEAM
All ▼

MANAGER
All ▼

COMAPNY NAME
All ▼

CITY
All ▼

LINE OF BUSINESS
All ▼

CATEGORY
All ▼

YEAR

| 2017 | 2018 | 2019 |

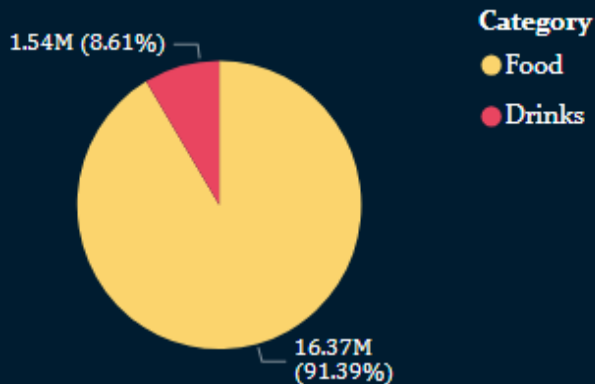**Total Qty Sold**
6M

Total Transaction
260.096K

Total Sales
17.91M

No.of Customers
1.411K

Sum of Total Sales by Category

1.54M (8.61%)
16.37M (91.39%)

Category
● Food
● Drinks

Sum of Total Sales by Manager

- Duane Frame: 9.2M
- Ronnie Daly: 8.7M
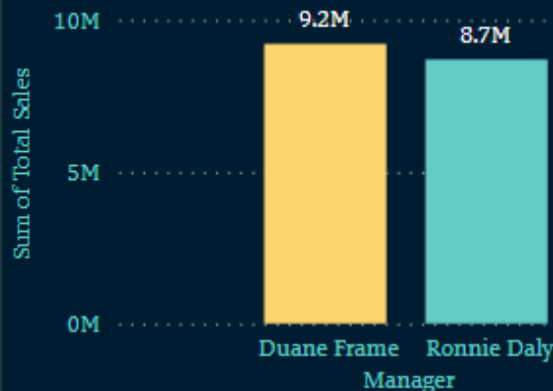
Manager

Sum of Total Sales by Supervisor

- Sarah-Jayne...: 6.3M
- Tahmina Vi...: 6.1M
- Harvey-Lee...: 3.1M
- Jessica Vale...: 1.6M
- Jonathon C...: 0.8M

Supervisor

Sum of Total Sales by Team

- Retail: 8.7M
- Distributors: 6.1M
- Online: 3.1M
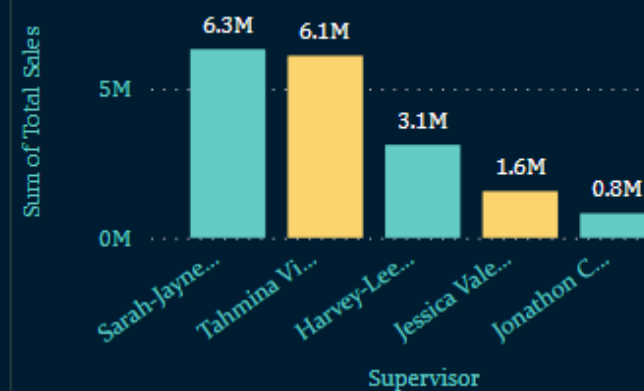
Team

Sum of Total Sales by SalesPerson
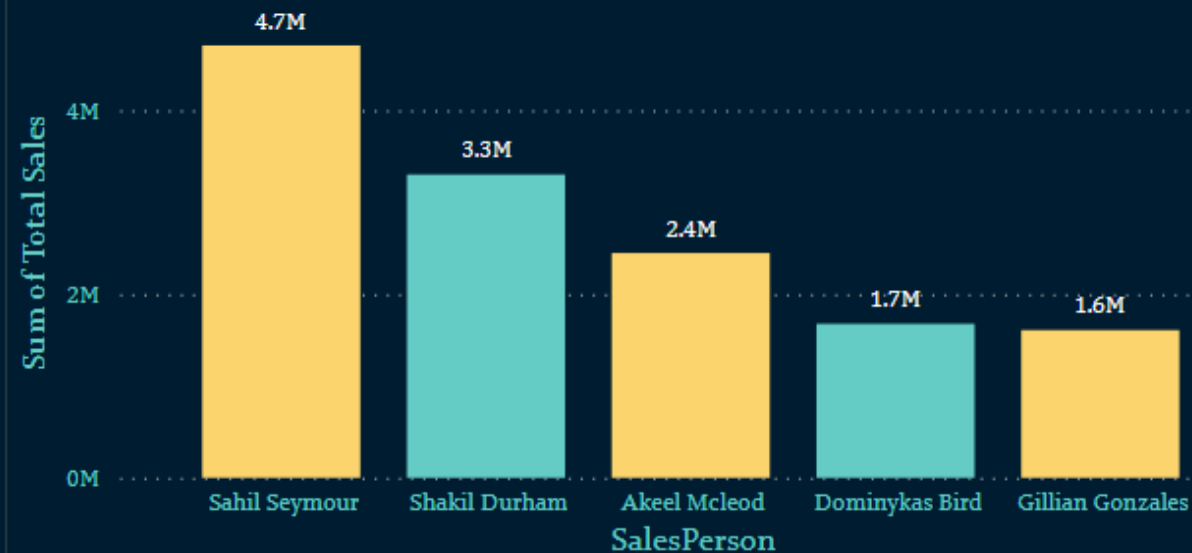
- Sahil Seymour: 4.7M
- Shakil Durham: 3.3M
- Akeel Mcleod: 2.4M
- Dominykas Bird: 1.7M
- Gillian Gonzales: 1.6M

SalesPerson

ANALYSIS

MONTH
All ⌄

YEAR

| 2017 | 2018 | 2019 |

SALESPERSON
All ⌄

SUPERVISOR
All ⌄

TEAM
All ⌄

MANAGER
All ⌄

COMAPNY NAME
All ⌄

CITY
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LINE OF BUSINESS
All ⌄

CATEGORY
All ⌄

Total Qty Sold
6M

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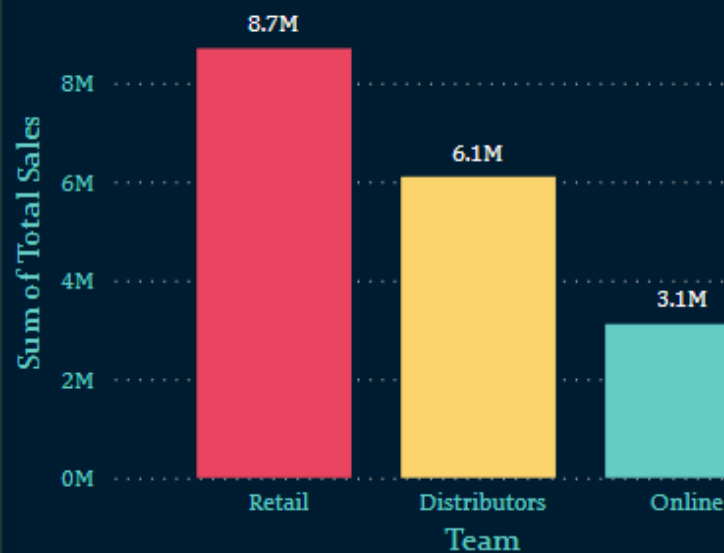
No.of Customers
1.411K

Sum of Total Sales by Year

1.05M (5.84%)
6.65M (37.12%)
10.21M (57.04%)

Year
● 2018
● 2017
● 2019

Sum of Total Sales by City

City	Sum of Total Sales
Yoman	3.4M
Winthrop	2.3M
Roslyn	2.2M
Badger	1.7M
Morton	1.1M
Manson	1.1M
Pine Lake	1.0M
Hatton	1.0M
Oso	0.7M
Port Hadlock	0.6M
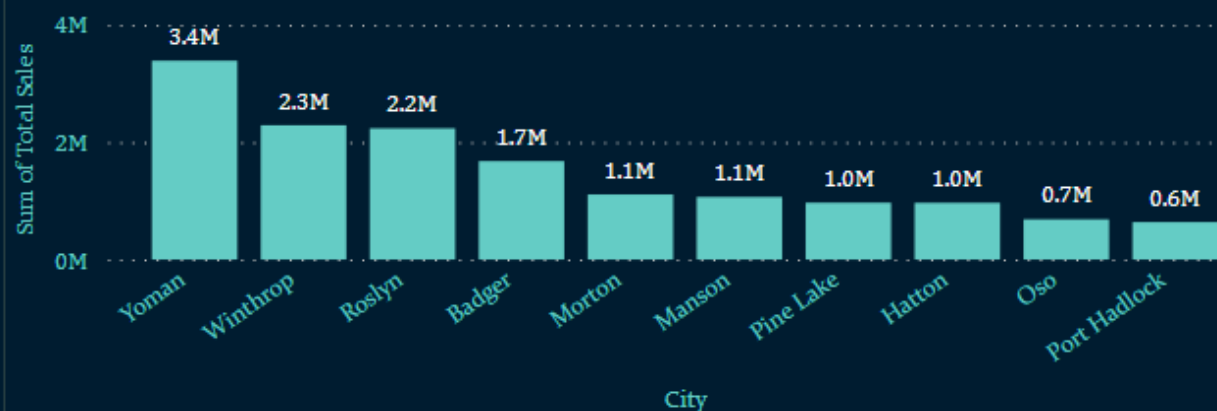
Sum of Total Sales by Line of Business

Line of Business	Sum of Total Sales
Supermarkets Lv3	3.6M
B & Bs	1.9M
Supermarkets Lv2	1.8M
Distributors Lv1	1.6M
Distributors Lv2	1.5M

Sum of Total Sales by Month Name

Month Name	Sum of Total Sales
October	1.96M
September	1.89M
November	1.80M
December	1.72M
August	1.70M
July	1.56M
January	1.36M
May	1.36M
June	1.34M
April	1.16M

ANALYSIS

MONTH
All ▼

SALESPERSON
All ▼

SUPERVISOR
All ▼

TEAM
All ▼

MANAGER
All ▼

COMAPNY NAME
All ▼

CITY
All ▼

LINE OF BUSINESS
All ▼

CATEGORY
All ▼

YEAR
| 2017 | 2018 | 2019 |

Total Qty Sold
6M

Total Transaction
260.096K

Total Sales
17.91M

No.of Customers
1.411K

Sum of Total Sales by Month Name and Category

Category: ● Drinks ● Food
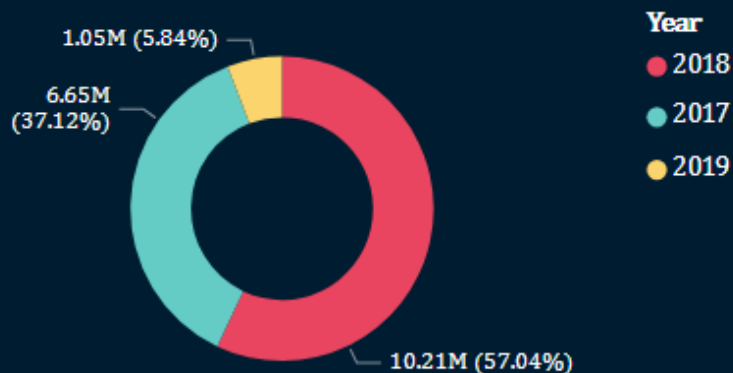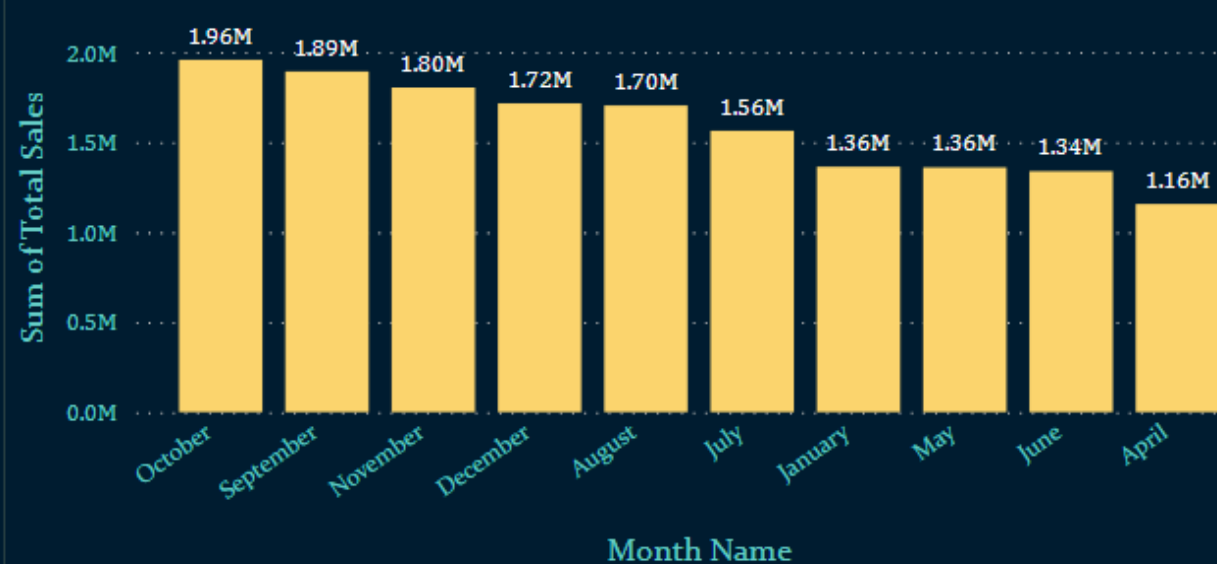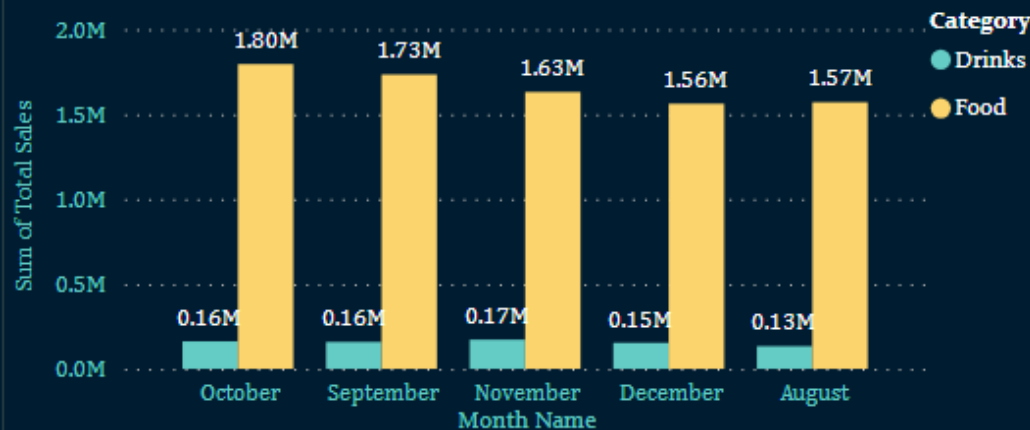
Month	Drinks	Food
October	0.16M	1.80M
September	0.16M	1.73M
November	0.17M	1.63M
December	0.15M	1.56M
August	0.13M	1.57M

Sum of Total Sales by City and Category
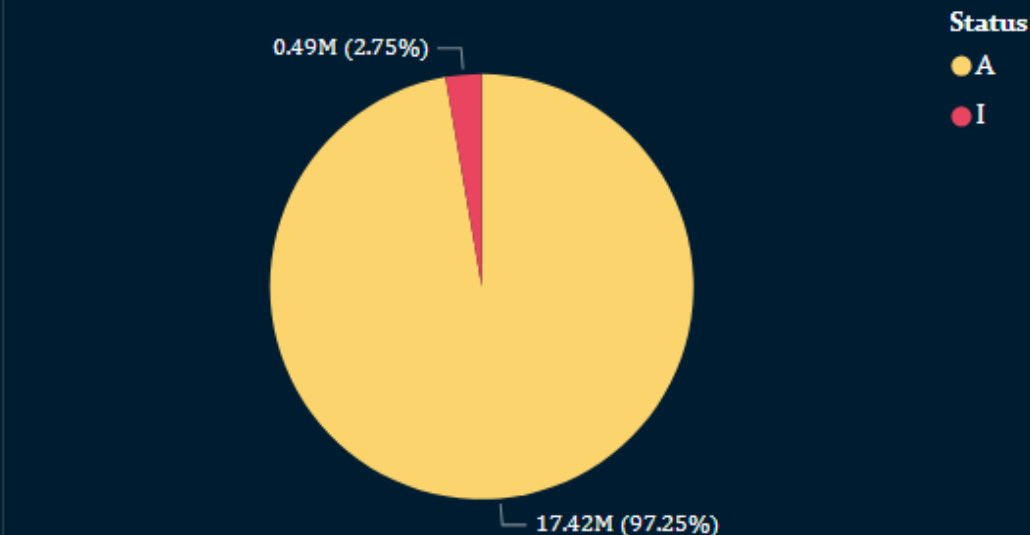
Category: ● Drinks ● Food

City	Drinks	Food
Yoman	0.1M	3.3M
Winthrop	0.8M	1.5M
Roslyn City	0.2M	2.0M
Badger	0.1M	1.6M
Morton	0.1M	1.0M

Sum of Total Sales by Status

Status: ● A ● I
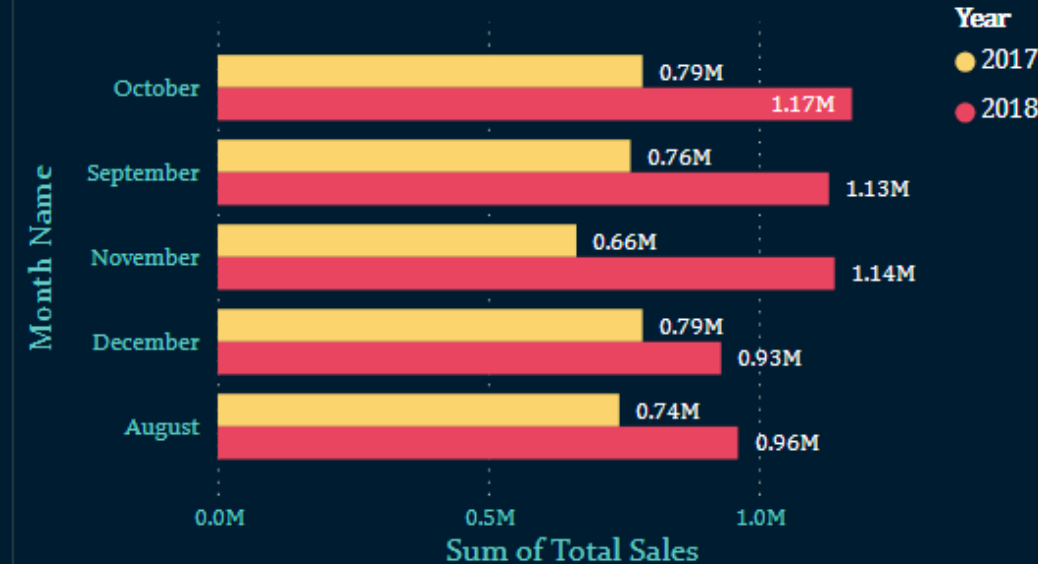
0.49M (2.75%)

17.42M (97.25%)

Sum of Total Sales by Month Name and Year

Year: ● 2017 ● 2018

Month Name	2017	2018
October	0.79M	1.17M
September	0.76M	1.13M
November	0.66M	1.14M
December	0.79M	0.93M
August	0.74M	0.96M

ANALYSIS

MONTH
All ▼

SALESPERSON
All ▼

SUPERVISOR
All ▼

TEAM
All ▼

MANAGER
All ▼

COMAPNY NAME
All ▼

CITY
All ▼

LINE OF BUSINESS
All ▼

CATEGORY
All ▼

YEAR		
2017	2018	2019

Total Qty Sold	Total Transaction	Total Sales	No.of Customers
6M	260.096K	17.91M	1.411K

Sum of Total Sales by Group

Sum of Total Sales

- Wheat Flours: 2.4M
- Oils: 1.4M
- Yeast: 1.2M
- Flours: 1.1M
- Sugarcane Liquor: 0.9M
- Crumbs: 0.5M
- Sweets: 0.5M
- Spices: 0.4M
- Olive Oils: 0.4M
- Sugars: 0.3M
- Coffee Pods: 0.3M
- Popcorn: 0.3M
- Powdered Milk: 0.3M
- Horticulture: 0.2M
- Imported Wine: 0.1M
- Red Dry Wine: 0.1M
- Canned Sweets: 0.1M
- Ground Coffee: 0.1M
- Energy Drinks: 0.0M
- Red Sweet Wine: 0.0M
- Sprinkles: 0.0M
- Teas: 0.0M
- Tomato Sauces: 0.0M

Group

Sum of Total Sales by Month Name and Group

Group
- ● Wheat Flours
- ● Yeast

Sum of Total Sales

Month Name	Wheat Flours	Yeast
October	0.51M	0.23M
September	0.44M	0.26M
November	0.45M	0.19M
December	0.45M	0.18M
August	0.34M	0.27M
July	0.34M	0.23M
June	0.33M	0.19M
May	0.32M	0.17M
April	0.32M	0.15M
January	0.35M	0.11M
March	0.32M	0.12M
February	0.31M	0.09M

Month Name

ANALYSIS

MONTH
All ⌄

SALESPERSON
All ⌄

SUPERVISOR
All ⌄

TEAM
All ⌄

MANAGER
All ⌄

COMAPNY NAME
All ⌄

CITY
All ⌄

LINE OF BUSINESS
All ⌄

CATEGORY
All ⌄

YEAR
| 2017 | 2018 | 2019 |

Total Qty Sold
6M

Total Transaction
260.096K

Total Sales
17.91M

No.of Customers
1.411K
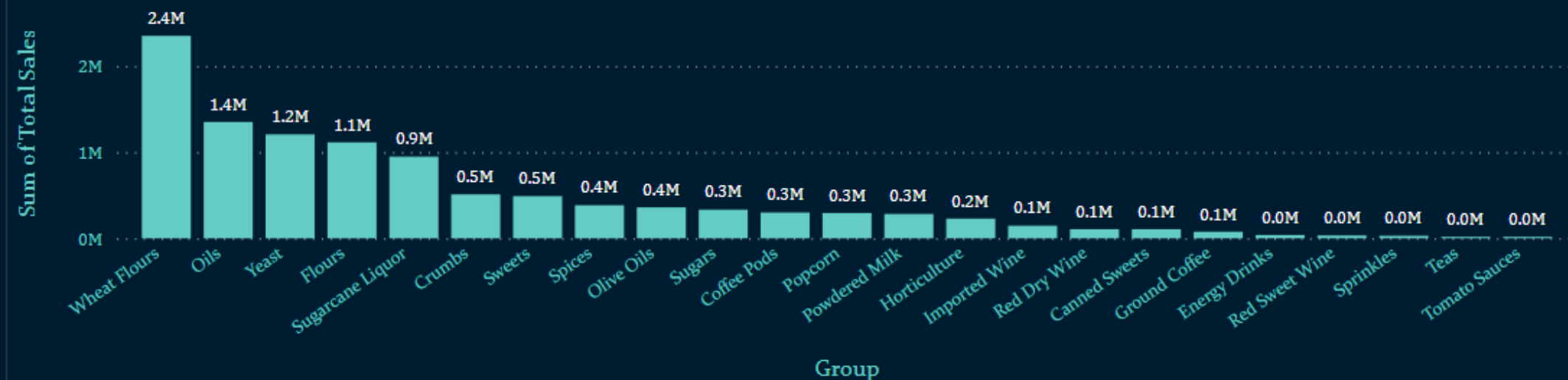
Sum of Total Sales by Team and Month Name

Month Name
- ● November
- ● October
- ● September

Retail: 1.0M, 0.9M, 0.8M
Distributors: 0.6M, 0.6M, 0.6M
Online: 0.5M, 0.4M, 0.4M
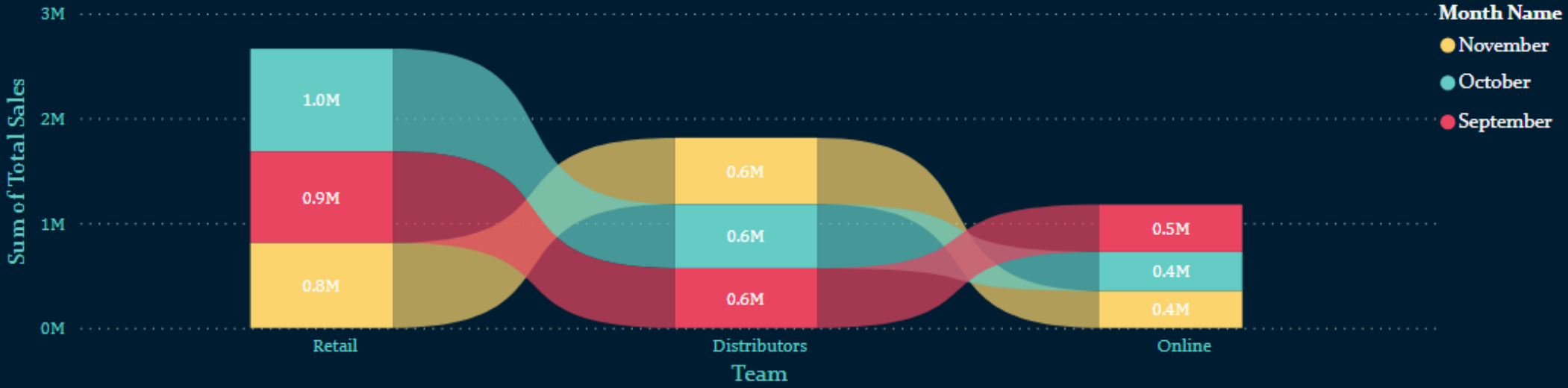
Sum of Total Sales by Month Name and SalesPerson ID

SalesPerson ID
- ● 215
- ● 265

Month Name	215	265
October	0.49M	0.29M
May	0.46M	0.31M
August	0.42M	0.34M
September	0.44M	0.30M
July	0.38M	0.32M
December	0.45M	0.24M
November	0.37M	0.31M
June	0.39M	0.29M
April	0.38M	0.29M
March	0.35M	0.25M
January	0.30M	0.22M
February	0.27M	0.15M
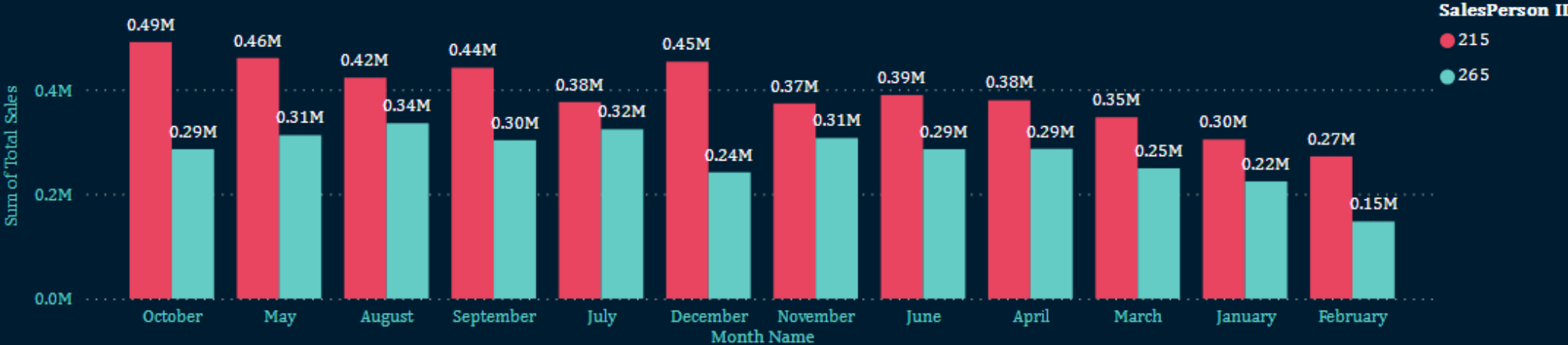
TARGET ANALYSIS

MONTH
All

YEAR
2017 | 2018 | 2019

SALESPERSON
All

SUPERVISOR
All

TEAM
All

MANAGER
All

COMAPNY NAME
All

CITY
All

LINE OF BUSINESS
All

CATEGORY
All

Total Qty Sold	**Total Transaction**	**Total Sales**	**No.of Customers**
6M	260.096K	17.91M	1.411K

SalesPerson	SalesPerson ID	Supervisor ID	Supervisor	Manager	Team	Manager ID
Akeel Mcleod	125	35	Tahmina Vinson	Duane Frame	Distributors	2
Ayaana Mackenzie	669	15	Jonathon Childs	Ronnie Daly	Retail	1
Dominykas Bird	144	55	Harvey-Lee Solomon	Duane Frame	Online	2
Gillian Gonzales	196	30	Sarah-Jayne Pennington	Ronnie Daly	Retail	1
Hywel Hopkins	183	25	Jessica Valentine	Ronnie Daly	Retail	1
Kien Mcgee	194	35	Tahmina Vinson	Duane Frame	Distributors	2
Lorenzo Donovan	285	55	Harvey-Lee Solomon	Duane Frame	Online	2
Sahil Seymour	215	30	Sarah-Jayne Pennington	Ronnie Daly	Retail	1
Serenity Rich	102	25	Jessica Valentine	Ronnie Daly	Retail	1
Shakil Durham	265	35	Tahmina Vinson	Duane Frame	Distributors	2
Tatiana Adamson	326	55	Harvey-Lee Solomon	Duane Frame	Online	2
Tess Sanderson	660	25	Jessica Valentine	Ronnie Daly	Retail	1

Sum of Total by SalesPerson ID

Sum of Total — 5.2M (215), 3.8M (265), 3.0M (102), 2.7M (125), 2.1M (144), 2.0M (196), 1.9M (669), 1.7M (285), 0.9M (326), 0.4M (194), 0.0M (660)
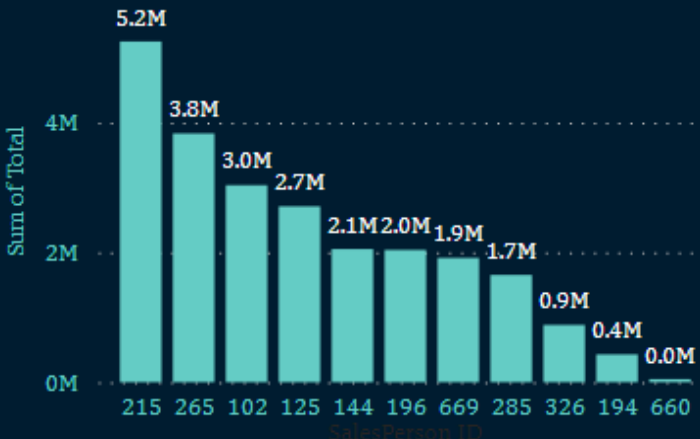
SalesPerson ID	1/1/2017	2/1/2017	3/1/2017	4/1/2017	5/1/2017	6/1/2017	7/1/2017	9/1/2017	10/1/2017	11/1/2017	12/1/2017	1/1/2018
102	140,768.31	124,258.75	169,509.93	143,465.23	98,423.63	133,401.86	109,124.99	101,603.97	55,255.94	261,910.63	171,050.97	82,260.76
125	21,525.58	50,778.52	80,286.31	117,769.06	162,043.21	184,889.34	175,629.57	110,607.72	146,219.27	69,770.20	182,360.78	86,536.03
144	72,301.44	47,360.52	54,145.36	89,457.66	115,437.27	72,356.85	164,689.10	112,396.58	106,251.30	68,987.31	78,735.89	46,295.10
194	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
196	75,253.91	56,094.07	156,709.11	82,723.07	47,426.32	66,398.22	91,840.46	87,425.55	143,060.59	75,032.88	192,859.72	48,769.00
215	286,012.90	268,739.95	329,813.36	159,143.44	117,572.13	275,378.66	253,013.47	97,924.04	146,035.93	434,640.24	303,755.07	90,909.05
265	122,199.73	147,007.56	127,262.13	206,980.49	119,509.50	192,623.29	181,088.25	142,684.49	229,701.31	261,398.86	195,199.02	58,168.11
285	0.00	0.00	0.00	0.00	0.00	39,276.03	35,473.27	36,858.82	75,760.57	114,750.80	90,021.56	43,710.08
326	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
660	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
669	0.00	0.00	0.00	0.00	0.00	68,107.20	109,175.03	127,474.75	128,952.32	86,569.41	79,299.41	92,534.83
Total	718,061.87	694,239.36	917,726.19	799,538.95	660,412.06	1,032,431.45	1,120,034.16	816,975.94	1,031,237.24	1,373,060.34	1,293,282.42	549,182.94

FINAL INSIGHTS

1. Total Sales of Food is 16.4M and Drinks 1.5M

2. Highest Sale was made in 2018 (10.2M),2017(6.65M) and 2019(1.05M)

3. Manager Duane Frame made sales of 9.2M and Manger Ronnie Daly made 8.7M

4. Salesperson with top sales is Sahil Seymour 4.7M

5. Retail team made more sales 8.7M and less sales was made by online team 3.1M

6. Supervisor with more sales is Sarah Jayne 6.3M

7. The line of business with more sales is Supermarkets LV3

8. The city with more sales is Yoman 3.4M, Winthrop 2.3M and Roslyn 2.2M

9. Month with more sales is October 1.96M, September 1.89M and November 1.8M

10. Wheat Flour made more sales of 2.4M then Oils made sales of 1.4M and Yeast made sales of 1.2M

11. 97.25% of sales was made by customers with status A

THANK YOU