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# Data-Driven Storytelling Presentation:

## ACCOUNT PERFORMANCE METRICS AND SALES TREND

BY  
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# INTRODUCTION

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## **Problem Statement**

- J.P. Morgan Chase & Co. is a leading global financial services firm that offers services and operates worldwide.
- The company aims to analyze the account performance metrics over the last 5 years (2017-2021) and the factors contributing to its compound annual growth rate (CAGR) in unit sales. This includes identifying opportunities for further improvement.

## **Business Questions**

- Examining the total unit sales for each year.
- Analyzing the year-over-year growth in sales.
- Identifying which account types are surpassing others in terms of unit sales.
- Calculating the average 5-year compound annual growth rate (CAGR) based on different account types.
- Evaluating the top-performing and bottom-performing accounts

# DATA MODELLING

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

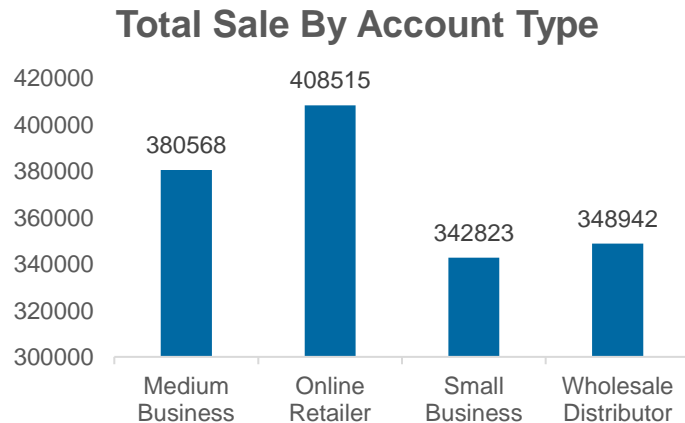
The screenshot displays a Microsoft Excel spreadsheet titled "Account Sales Data for Analysis for Task 4 (version 1).xlsx". The interface includes the standard Excel ribbon (File, Home, Insert, Page Layout, Formulas, Data, Review, View, Automate, Developer, Help, Table Design) and a sidebar on the right with "Comments" and "Share" options. The spreadsheet data is organized into several columns:

- Account Information:** Account Name, Account Address, Decision Maker, Phone Number, Account Type.
- Product Lines:** Product, Product, Product.
- Marketing / Promotion Programs:** Social Media, Coupon, Catalog Includ, Poster.
- Product Sales Volume (Units):** 2017, 2018, 2019, 2020, 2021, 5 YR CAG, Total sales per year.

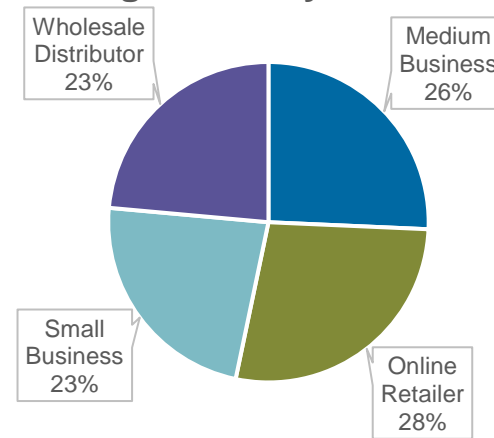
The formula bar shows the formula `=SUBTOTAL(109,[2020])`. The sidebar on the right contains a list of accounts (SB 1 to SB 6) and a "Snipping Tool" window that says "Screenshot copied to clipboard and saved. Select here to mark up and share."

# DATA ANALYSIS AND VISUALIZATIONS

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



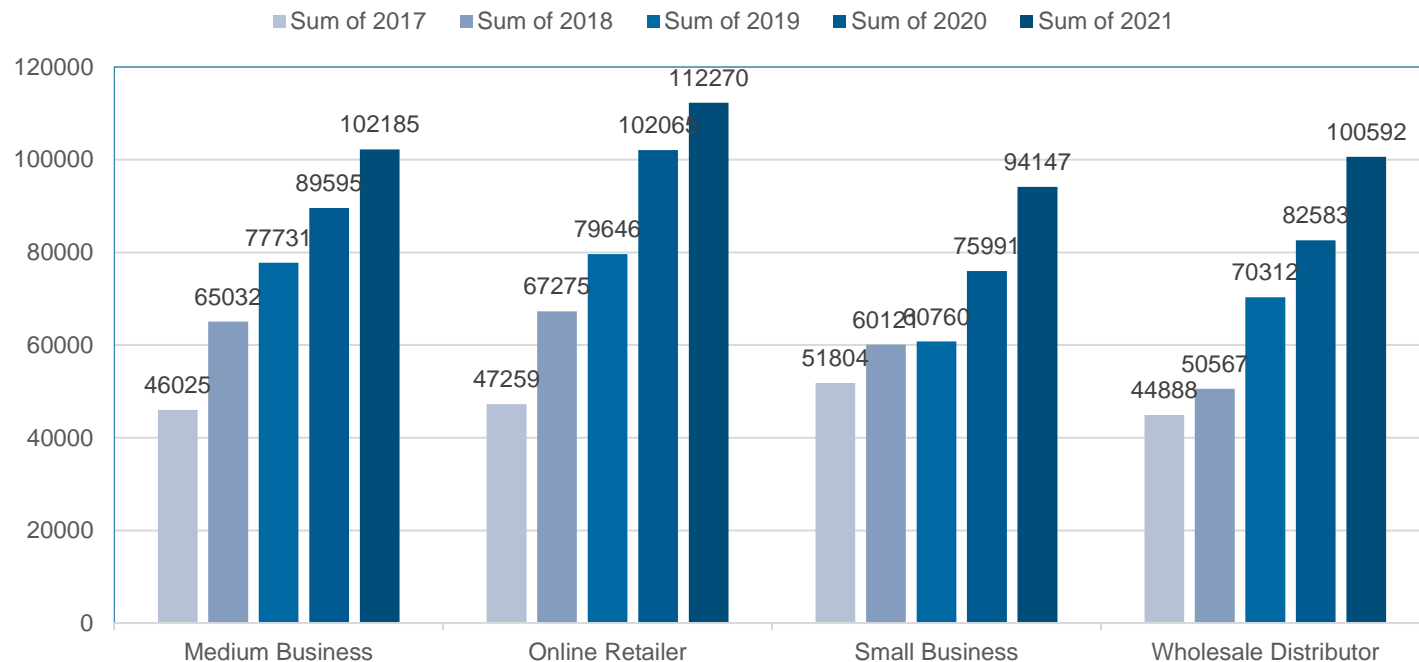
**Percentage sales By Account Type**



# DATA ANALYSIS AND VISUALIZATIONS

Directing our sales resources and adjusting our sales all type of account types are getting most sales in the year 2021 followed by 2020.

**Sales By Account Type Per Year**

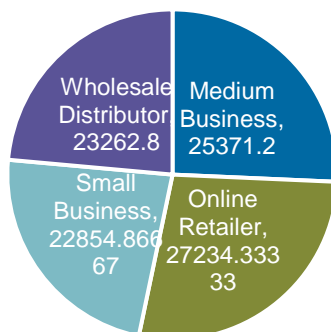


# DATA ANALYSIS AND VISUALIZATION

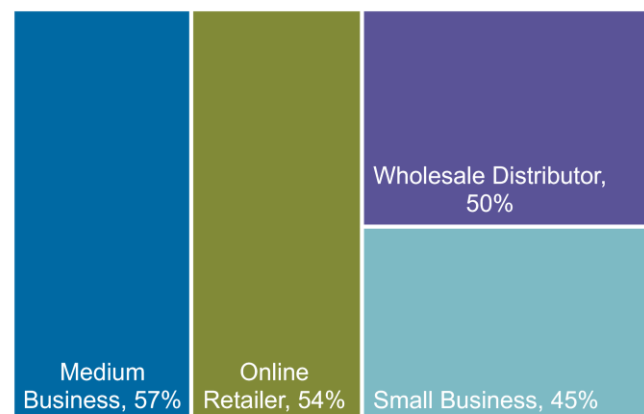
From the pie chart we can find that online retailers have got the overall maximum sale followed by medium business and wholesale distributors got the minimum sale.

From the TREE MAP we can see that medium Business got the max average 5yr CAGR of 57%.

Average Total Sale By Account Type



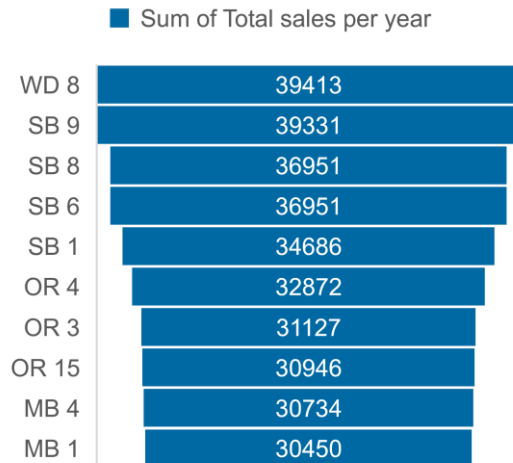
Avg 5yr CAGR VS Account Type



# DATA ANALYSIS AND VISUALIZATION

The account name WD8 proved to be the highest-performing account, achieving an impressive sales volume of approximately 39,413 units. On the other hand, accounts WD11, WD1, and SB10 performed at the lowest level in terms of sales volume. Specifically, WD11 accounted for 8,676 units, WD1 for 10,574 units, and SB10 for 16,060 units, all in terms of sales volume

**Top 10 Account Name**



**Bottom 10 Account Name**

