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Crunchy Corner Business Optimization & Budgeting

By Kasfur Dhuniyan

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Module 01

Understanding The Business

Crunchy Corner Business

About Company

Crunchy Corner is one of India largest Fast Foods restaurant chain and serving millions of customer daily across various cities in India with more than 1000 restaurant and have largest SKU in the industry

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Live Training

- 4- Sunday
- Certificates
- 3 Months Internship
- Rs 5000/-

Understand the Data First To Understand the Business in Better Way....Excel

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Data Preparation

Data Arrangement : Dimension & Fact able

Data Modelling : Relationship Development for Insight

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Client Requirement

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Defining Problem

We Are Looking For Dashboard where we can check our Financial Performance, How we can Optimize our Business and Budgeting

01

Financial Overview Metrices

02

Optimization of Business

03

Financial Planning & Budgeting

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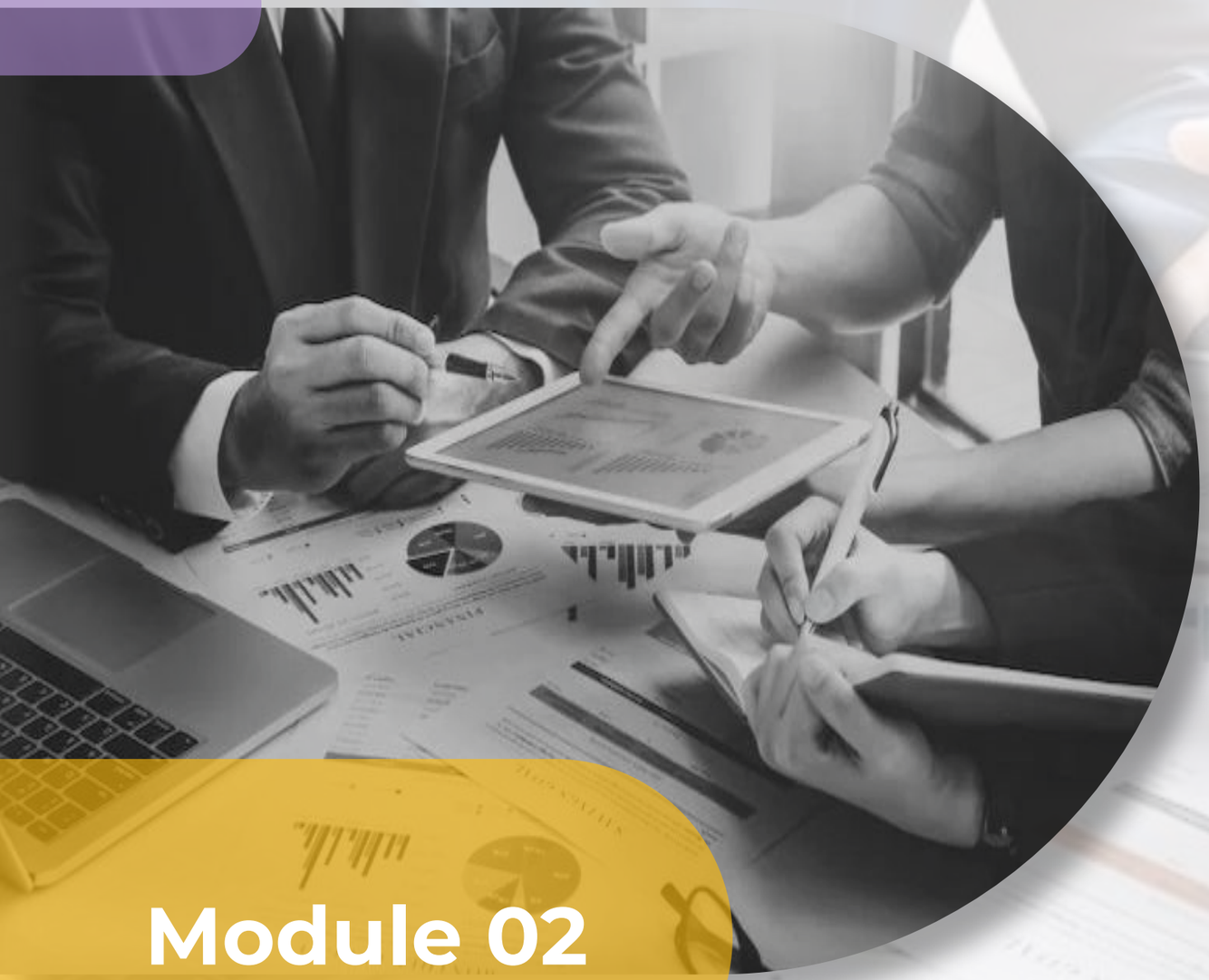

Financial Performance Analysis

Module 02

Financial Performance

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01 Overall Sales,Gross Profit,EBITDA,PAT,SKU

02 Show YoY Change for Following (Sales, Gross Profit,EBITDA,PAT)

03 Trend of Sales with PAT with PAT%

04 Show 100% stake Column Chart showing (Sales,Gross Profit,EBITDA,PAT)

05 Show Sales by Category & Location

06 Sales Bifurcation by Channel

07 Volume & Trend by Category

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Financial Performance Steps

To Analyze the Historical Data Always Calculate sum of all Line item Available in Data ,Always Try to avoid Column Total

Calculate for Actual and Budget Both

DAX for Actual & Budget

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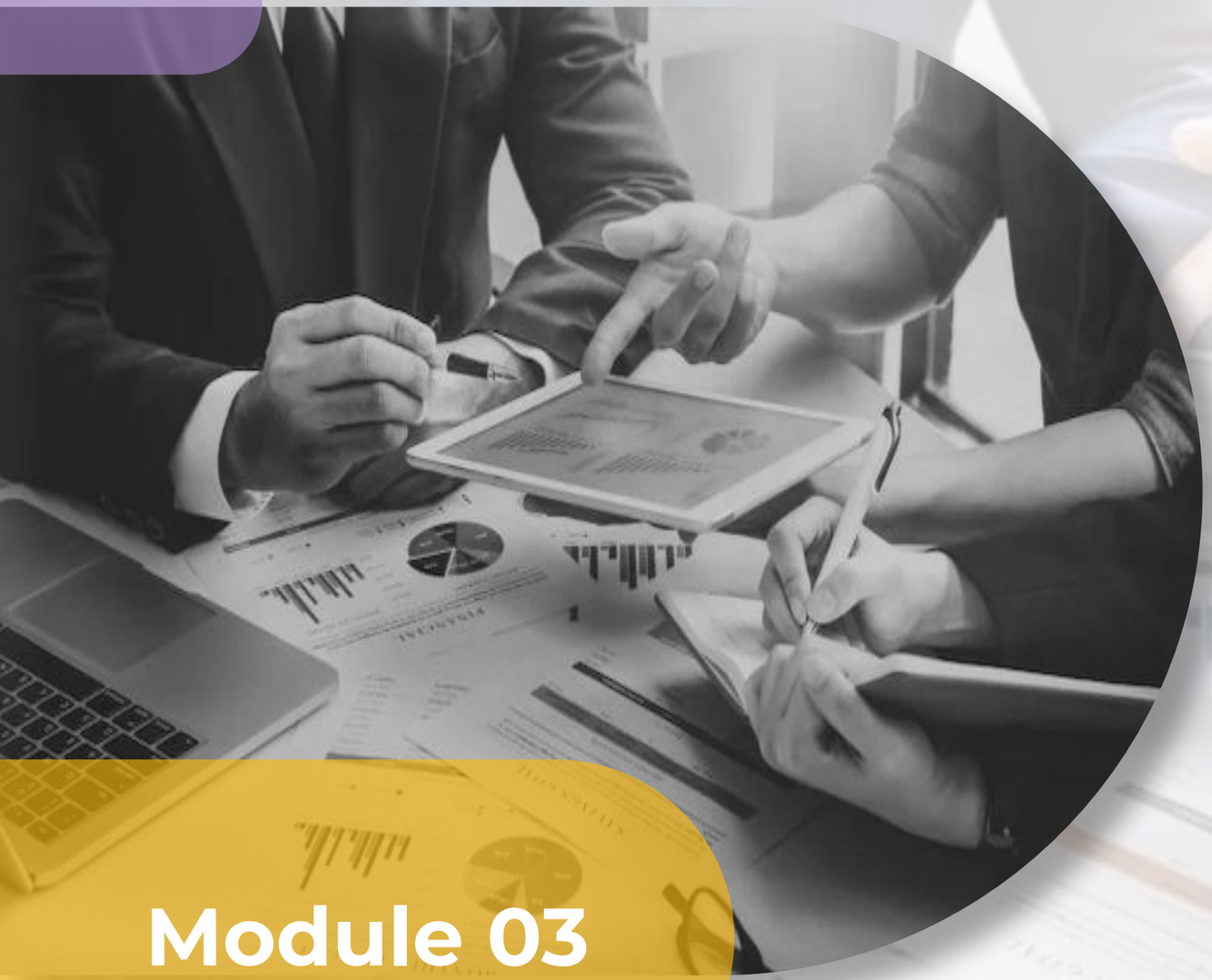

Optimization of Business

Module 03

Optimization of Business

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01 Top Category by Gross Profit & Net Revenue (Scatter Plot)

02 Gross Profit & Volume Comparison with Average (Dynamic)

03 Pareto Analysis (Level 1,2,3)

04 Show highest sales by category and % of SKU Contribution (Mekko Chart)

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Optimization Steps

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Will Create Formula every Problem statement defined by the client in order to Complete the Project

DAX Solved for the Problem

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Quadrant Analysis

Quadrant Analysis to Identify category ,Sub Category high Contribution by sales & Gross Profit

Quadrant Analysis to Identify Location high Contribution by sales & Gross Profit

Step 1

Calculate Gross Profit Margin

Dax

Gross Profit = sum(Actual(Gross_Profit)

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GP Comparison

Gross Profit & Volume Comparison For Category

Step 1

Calculate Gross Profit Margin

Dax

Gross Profit = sum(Actual(Gross_Profit)

Gross Profit = sum(Actual(Total Volume)

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Pareto Analysis

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Find out 20% SKU Contributing 80% of the Revenue

Pareto 1

Calculate

Total Sales

Ranking of SKU By Sales

Cumulative Sales

Calculate Total SKU Sales

Cumulative % = Cum/Total SKU sales

SKU Count

Cumulative sku Count

Net SKU Count

Cum SKU %

Cum SKU %

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Pareto Analysis

Find out 20% SKU Contributing 80% of the Revenue

Pareto 2

Calculate

Des SKU NR

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Pareto Analysis

Find out 20% SKU Contributing 80% of the Revenue

Pareto 3

Calculate

Pareto Base

Pareto % Top N revenue

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Show Sales & % SKU

Mekko Chart is a type of data visualization that combines elements of bar charts and stacked bar charts to show data distribution across multiple dimensions. It is particularly useful for displaying categorical data across different variables, where both the width and height of the bars represent different metrics.

Mekko Chart

Calculate

Total Sales

%SKU Over Total SKU

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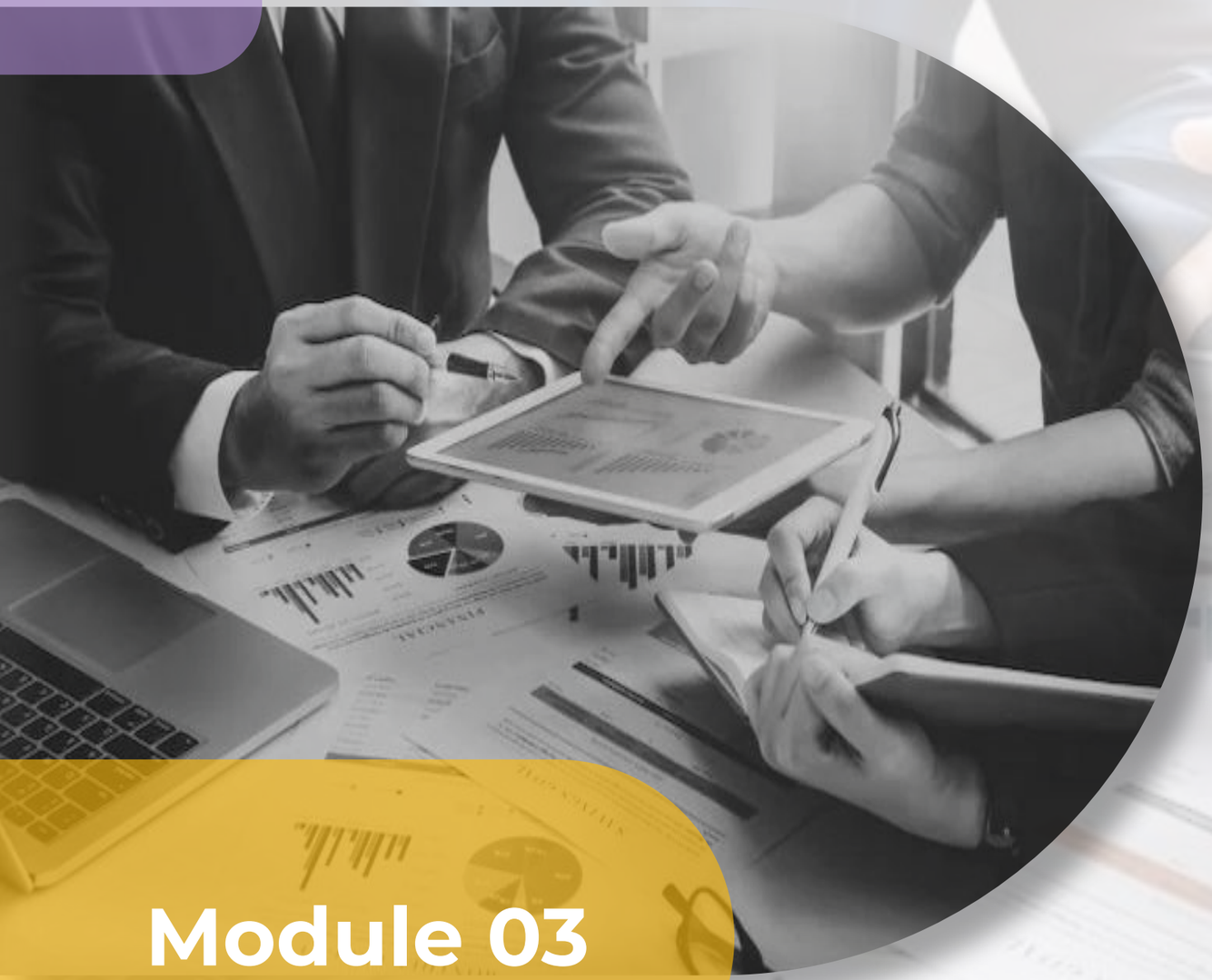

Budgeting Analysis

Module 03

Budgeting Analysis

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01 PVM Analysis

02 Variance Analysis

03 Actual Vs Budget Financial Analysis for Business Drivers (Sales,EBITDA,PAT,Volume) with Trend YoY

04 Actual Vs Budget Financial Analysis for Cost Drivers (COGS,Packging,Marketing) with Trend YoY

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Budgeting Steps

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Will Create Formula every Problem statement defined by the client in order to Complete the Project

DAX Solved for the Problem

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PVM Analysis

PVM Analysis helps to understand the factors affected the business to Increase or Decrease

Step 1

Here We are showing Total Amount of Sales for the Given Dates

Column Dax

Day = DAY(ListOfOrders[Order Date].[Date])

Calculated Measures

Sales by Day = calculate([Total Sales],groupby(ListOfOrders,ListOfOrders[Day]))

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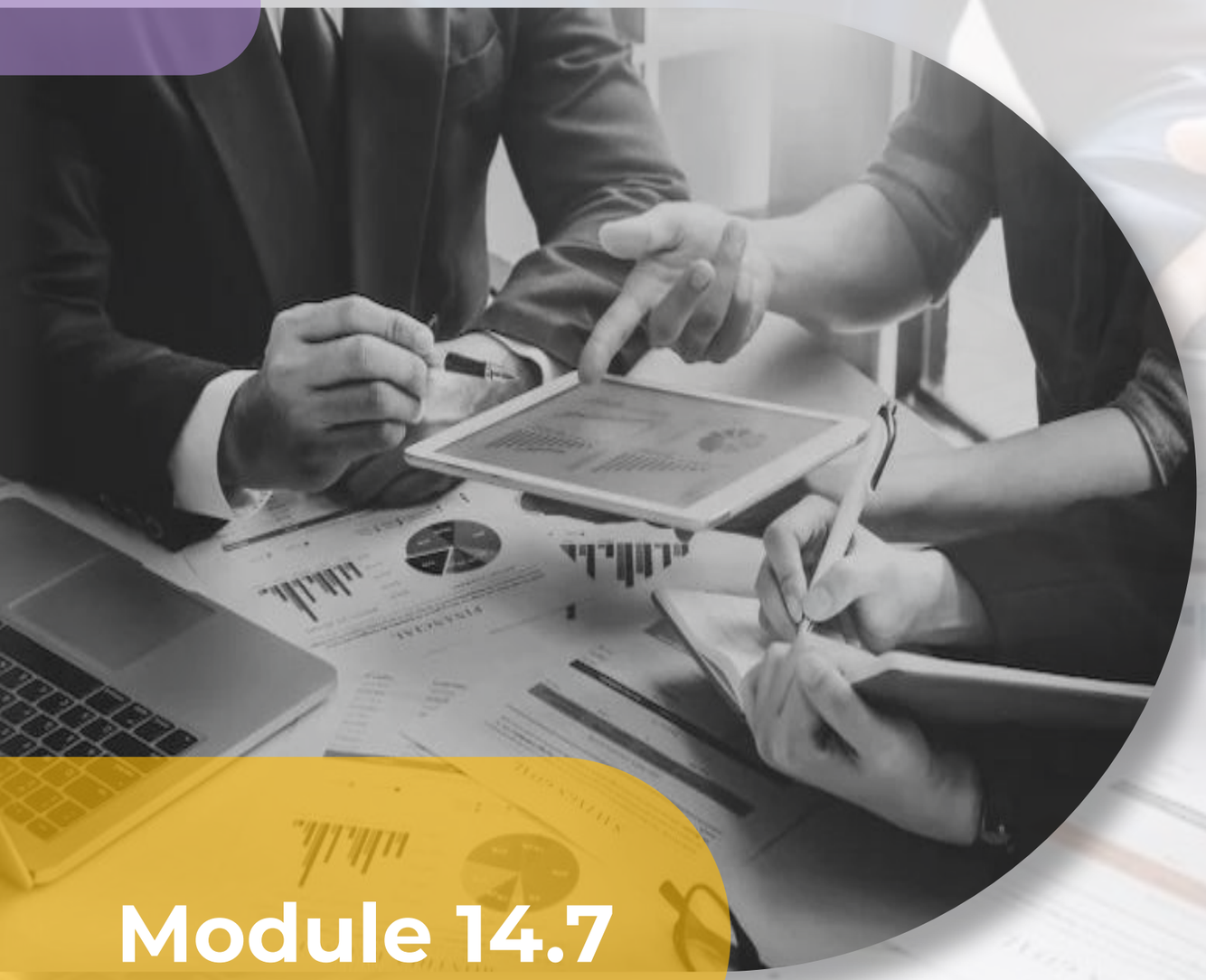


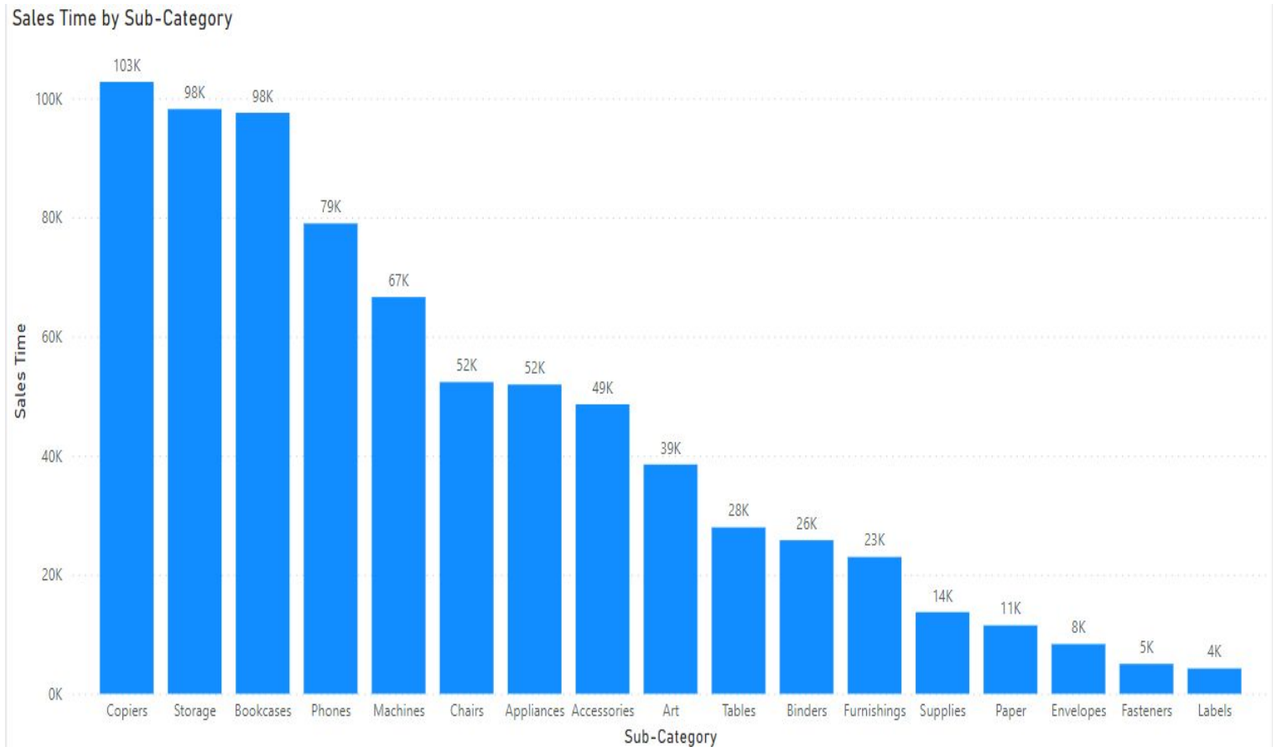
Advanced DAX Function

Module 14.7

Calculate monthly and ytd sales for each sub category?

Selectedvalue Function

Here we are showing monthly and ytd sales for each sub category



Calculated Measures

Sales Time =
IF(SELECTEDVALUE(Timeframe[Timeperiod])="Monthly",
SUM(OrderBreakdown[Sales]),
IF(SELECTEDVALUE(Timeframe[Timeperiod])="Ytd",
CALCULATE(SUM(OrderBreakdown[Sales]),
FILTER(all(ListOfOrders),ListOfOrders[Order Date]<=MAX(ListOfOrders[Order Date])&&
ListOfOrders[Order Date].[Year]= max(ListOfOrders[Order Date].[Year])))))

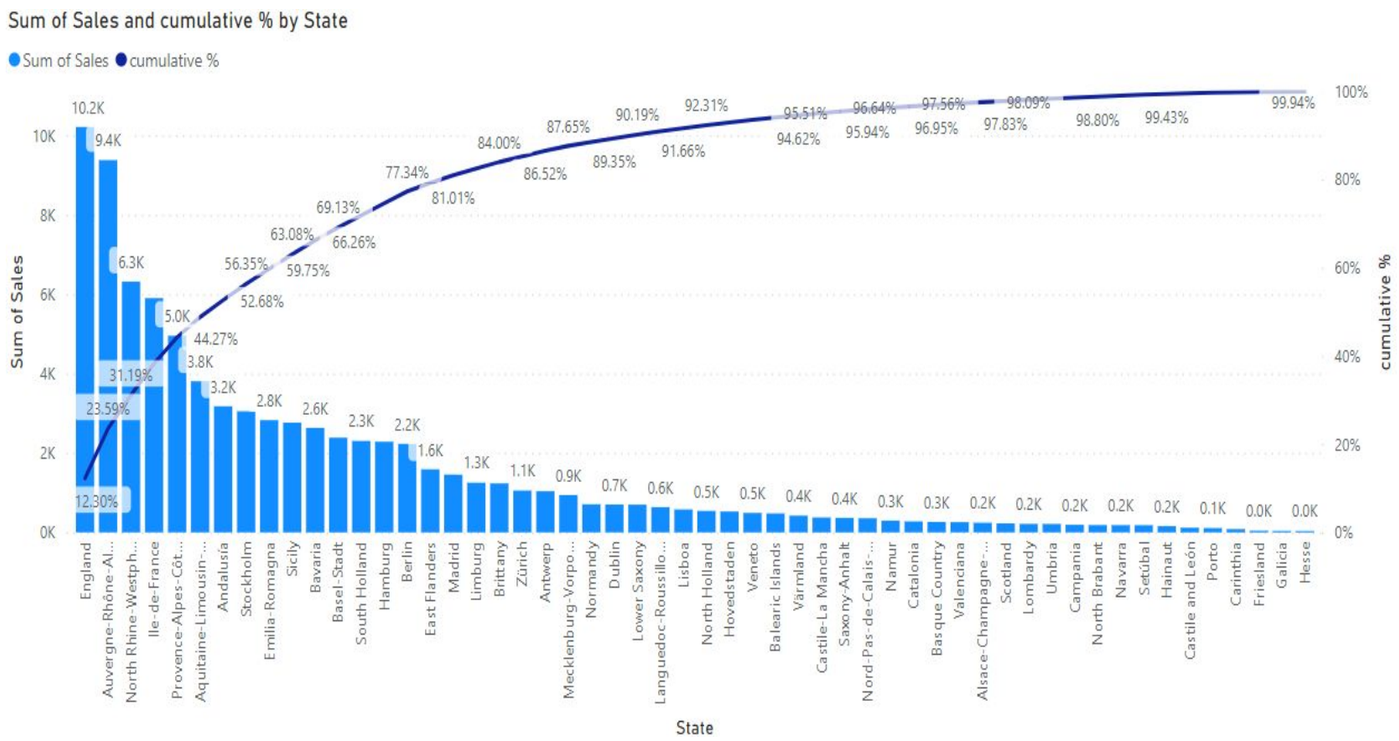
Calculate Cumulative Sales %?

Cumulative %

Here we are showing cumulative sales%.

Calculated Measures

Cumulative % = Var sales = SUM(OrderBreakdown[Sales])
return
DIVIDE(
CALCULATE(SUM(OrderBreakdown[Sales]),
FILTER(
ALLSELECTED(ListOfOrders[State]),
CALCULATE(SUM(OrderBreakdown[Sales])>=sales))),
[All sales])



Calculate Running total sales?

Running Total

Here we are showing running total sales.

Calculated Measures

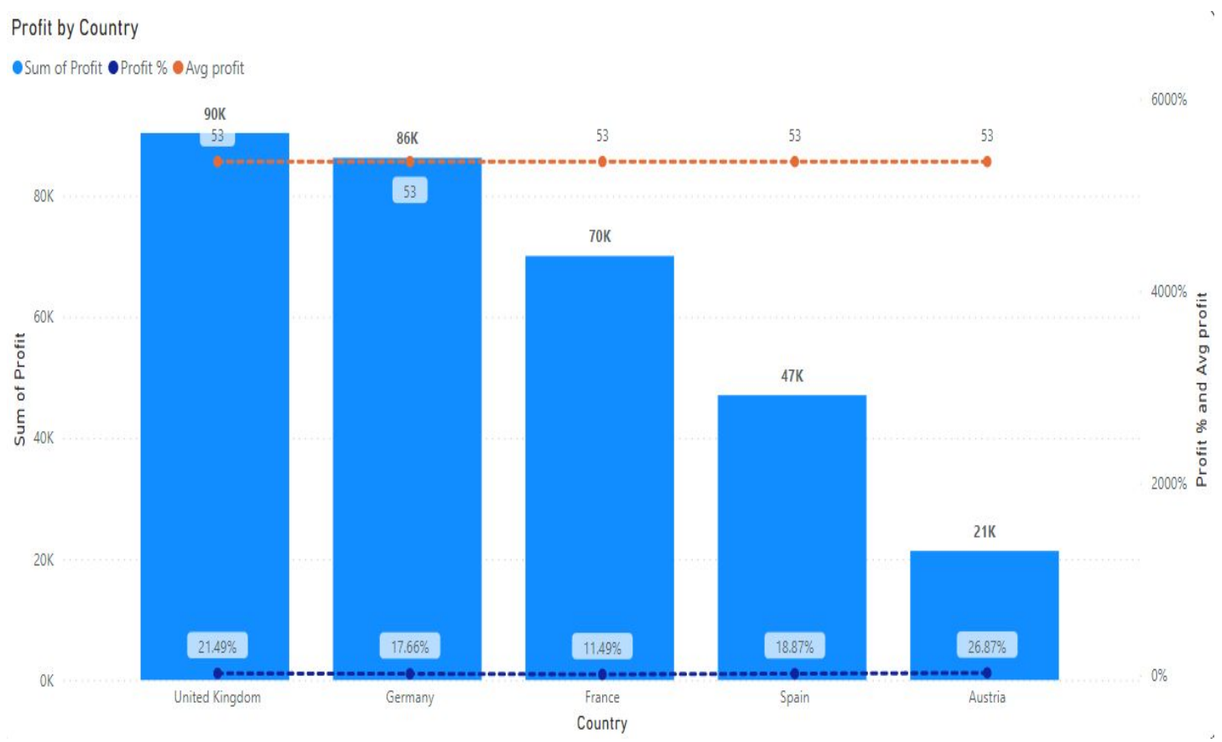
Sales Running Total = CALCULATE([Sales Time],FILTER(ALL(ListOfOrders[Country]), ListOfOrders[Country]<=MAX(ListOfOrders[Country])))

Country	Sum of Sales	Sales Running Total
Austria	114	114
Belgium	4,222	4336
Denmark	527	4863
France	27,235	32098
Germany	15,512	47610
Ireland	703	48313
Italy	6,709	55022
Netherlands	3,207	58229
Portugal	870	59099
Spain	6,629	65728
Sweden	3,474	69202
Switzerland	3,442	72644
United Kingdom	10,444	83088
Total	**83,088**	**83088**

Calculate profit making top countries?

Top N (Ranking)

Here we are showing profit making top countries.



Calculated Measures

Rank country =

```
Var A = RANKX(ALL(ListOfOrders[Country]),[Profit],,DESC)
Var B = IF(HASONEVALUE('Top N Country'[Top N Country]), MIN('Top N Country'[Top N Country]),20)
Return
IF(A<=B,1,0)
```

Calculate Sales & Profit contribution for each sub category?

Product Contribution

Here we are showing sales & profit contribution for each sub category.

Sub-Category	No of Products	%GT Sum of Sales	%GT Sum of Profit
Accessories	14	5.91%	6.89%
Appliances	10	10.40%	0.39%
Art	37	5.06%	7.74%
Binders	38	4.95%	6.32%
Bookcases	10	11.17%	25.19%
Chairs	15	5.66%	-1.53%
Copiers	17	15.95%	11.77%
Envelopes	12	1.22%	2.34%
Fasteners	9	0.46%	0.83%
Furnishings	15	2.96%	2.30%
Labels	11	0.60%	0.41%
Machines	16	5.21%	0.14%
Paper	16	2.31%	5.60%
Phones	19	13.98%	27.96%
Storage	31	9.74%	2.13%
Supplies	14	1.51%	1.53%
Tables	2	2.89%	-0.01%
Total	**286**	**100.00%**	**100.00%**

Apply conditional formatting using dax?

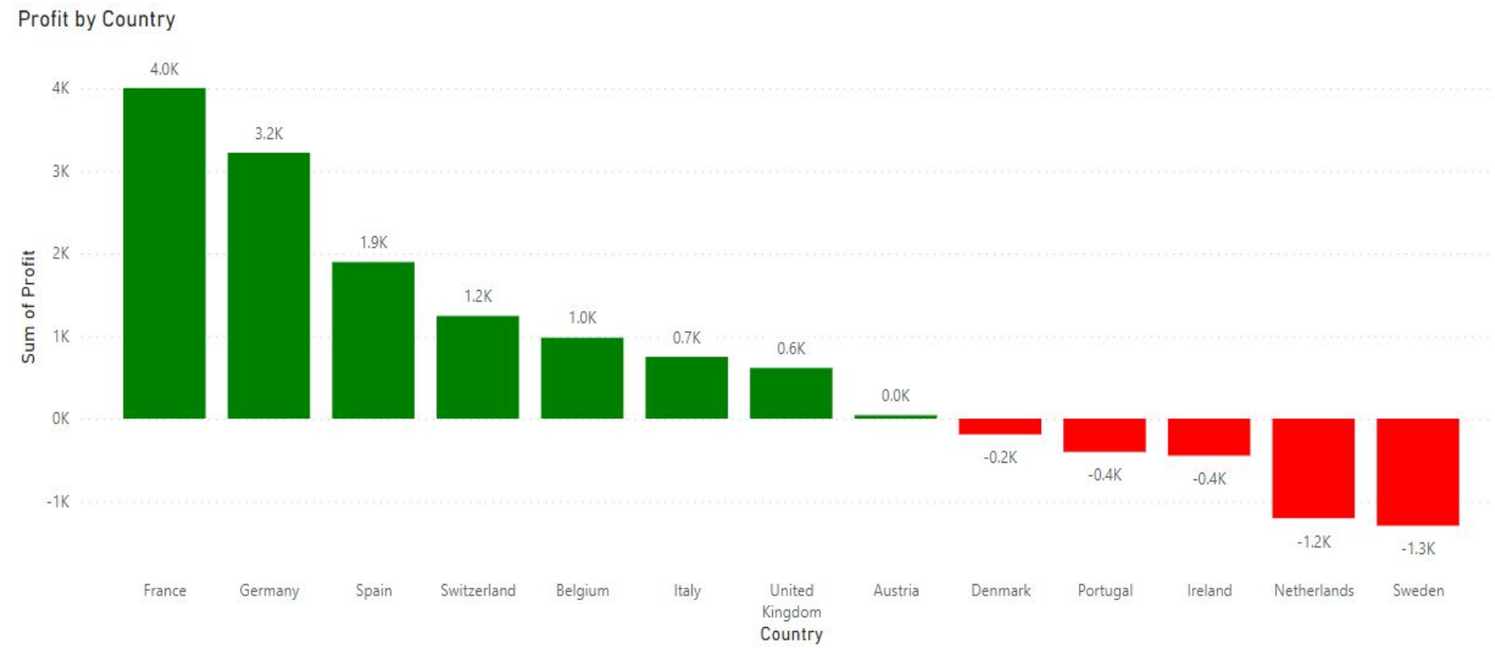
Conditional formating

Here we are showing green bars for

Positive profit and red bars for negative profit.

Calculated Measures

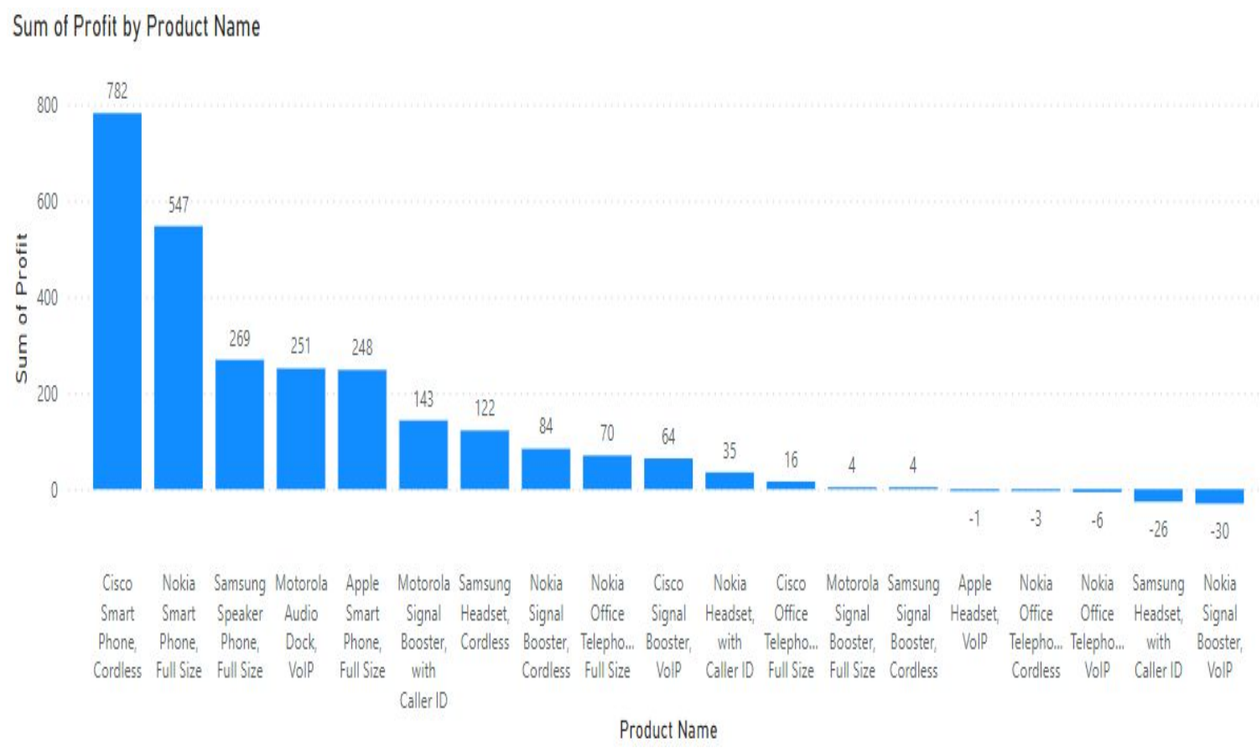
Conditional formatting =
IF(SUM(OrderBreakdown[Profit])>0,"Green",
IF(SUM(OrderBreakdown[Profit])<0,"Red"))



Calculate Total Active products?

Active Products

Here we are showing active products till date.



Calculated Measures

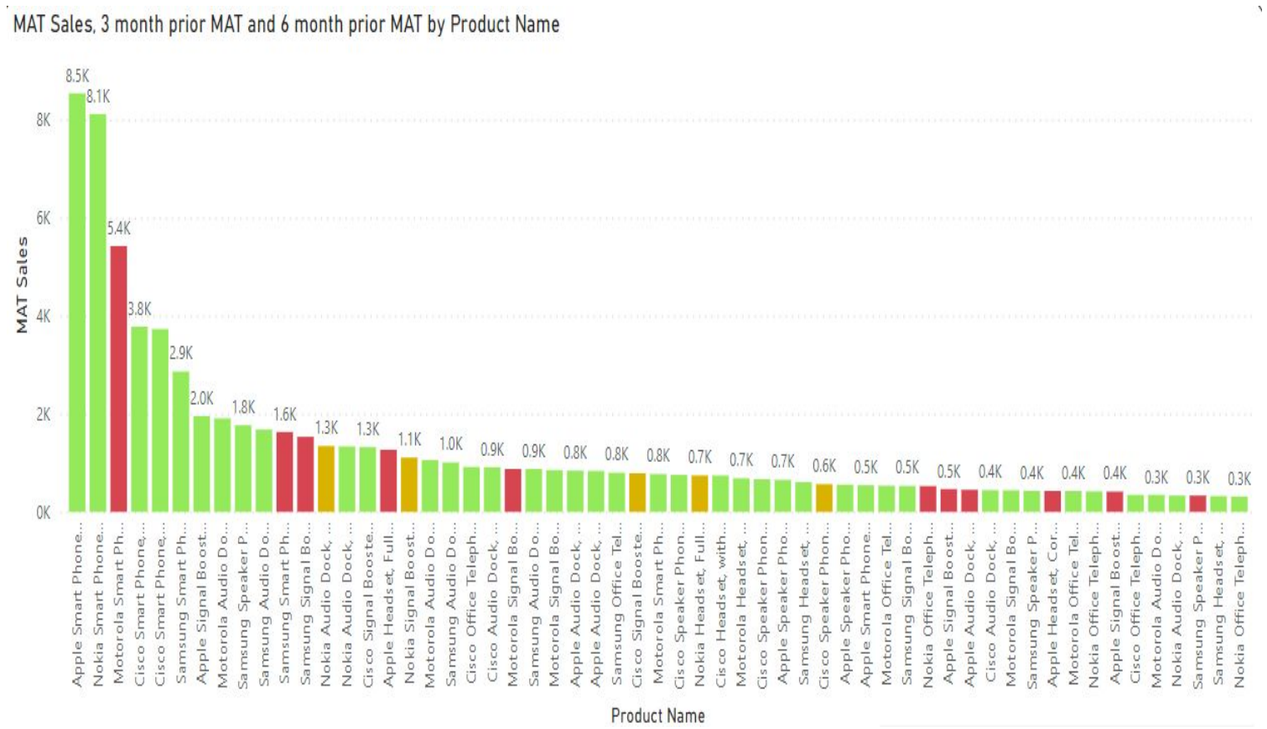
Active Products till date =

```
IF (
   HASONEFILTER ( OrderBreakdown[Product Name] ),
   IF ( SELECTEDVALUE (  OrderBreakdown[Product Name] ) IN
VALUES (  OrderBreakdown[Product Name] ), 1, 0 ),
   SUMX (
      VALUES (  OrderBreakdown[Product Name] ),
      CALCULATE (
         IF ( SELECTEDVALUE (  OrderBreakdown[Product Name] ) IN
VALUES (  OrderBreakdown[Product Name] ), 1, 0 ))))
```

Calculate 3 month prior and 6 month prior MAT and highlight loss making and profit making products?

MAT

Here we are showing 3 month prior and 6 month prior MAT and highlight loss making and profit making products.



Calculated Measures

3 month prior MAT = CALCULATE([MAT Sales],DATESINPERIOD(ListOfOrders[Order Date].[Date],EOMONTH(MAX(ListOfOrders[Order Date]),-3),-3,MONTH))

MAT conditions =
IF([MAT Sales]< [6 month prior MAT],1,
IF([MAT Sales]< [3 month prior MAT],2,3))

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THANK YOU

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