Sales Operations Dashboard - Tableau Project Summary

Project Overview

I designed an interactive Sales Operations dashboard in Tableau Public to showcase key performance indicators (KPIs), sales pipeline metrics, and profitability insights. The project demonstrates end-to-end BI workflow, including dataset creation, data cleaning, and advanced visualization techniques to drive business decisions.

Objectives

- Visualize sales performance across multiple dimensions (region, product, sales stage, payment method).
- Provide stakeholders with actionable insights into revenue trends, conversion rates, and deal pipeline.
- Highlight top payment methods and profit margins to inform strategy.

Key Features

- KPI Tiles: Total Revenue, Average Profit Margin, Closed Won Opportunities, Top Payment Method by Revenue
- Conversion Effectiveness: Matrix of Sales Reps by Deal Stage, customer distribution bar
- Pipeline Performance: Horizontal bar chart showing deal stage volume
- Revenue & Profitability: Monthly Revenue Trend, Avg Profit Margin by Product Line, Revenue by Region & Product
- Payment Mix: Pie chart of payment methods

Skills Applied

- Data modeling and blending
- KPI calculation and aggregation
- Tableau visualization best practices
- Dashboard design for executive consumption

Tools & Technologies

- Tableau Public Desktop
- Custom synthetic sales dataset (CSV)
- Windows environment

Outcome

The final dashboard provides a clear, interactive overview of sales operations performance. It can be leveraged to identify high-performing products, optimize sales processes, and improve revenue forecasting accuracy.

Screenshot Preview

(Include your final dashboard image here when exporting)