

# Wholesaler Customer Analysis



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## 1. Introduction

The is dedicated to delivering high-quality products and services to our valued customers. In our ongoing commitment to better understand and serve our customers, we have initiated the Wholesaler Customer Analysis project. The primary objective of this project is to gain deep insights into the behaviors, preferences, and needs of our diverse customer base.

2. Identify and segment our customers based on their unique characteristics and preferences.
3. Analyze our competitive landscape to identify opportunities and challenges.Understand customer sentiment
4. Understand customer sentiment through surveys and feedback analysis.
5. Map the customer journey to optimize key touchpoints.
6. Develop actionable recommendations to improve our customer engagement and overall experience.

**Project Scope:** The project will encompass an in-depth analysis of our current customer base, including retailers, businesses, and individuals who source products through our wholesale distribution. It will also examine industry competitors and market trends.

**Methodology:** To achieve these objectives, we will employ a multifaceted approach, including surveys, interviews, data analytics, and competitor analysis. The insights gained will be used to create customer personas, a SWOT analysis, and actionable recommendations for implementation.**Report Overview:** This project report will provide a comprehensive analysis of our findings, key insights, and practical recommendations for enhancing our relationships with customers, ultimately leading to improved customer satisfaction, loyalty, and business growth.We believe that this Wholesaler Customer Analysis project is a crucial step in our journey towards becoming more customer-centric and maintaining our competitive edge in the market.

## 2. Problem Definition & Design Thinking :

**Problem Statement:** Our problem statement is the foundation for the entire project, as it defines the specific issue or challenge that the project aims to address.

**Problem Statement:** Despite being a leading wholesaler, our organization has experienced stagnation in customer growth and satisfaction levels. We are confronted with challenges such as increasing customer churn, unmet customer needs, and a lack of competitive differentiation. We need to find innovative ways to better understand, engage, and serve our diverse customer base, ultimately leading to increased customer loyalty and business growth.

## Empathy Map:

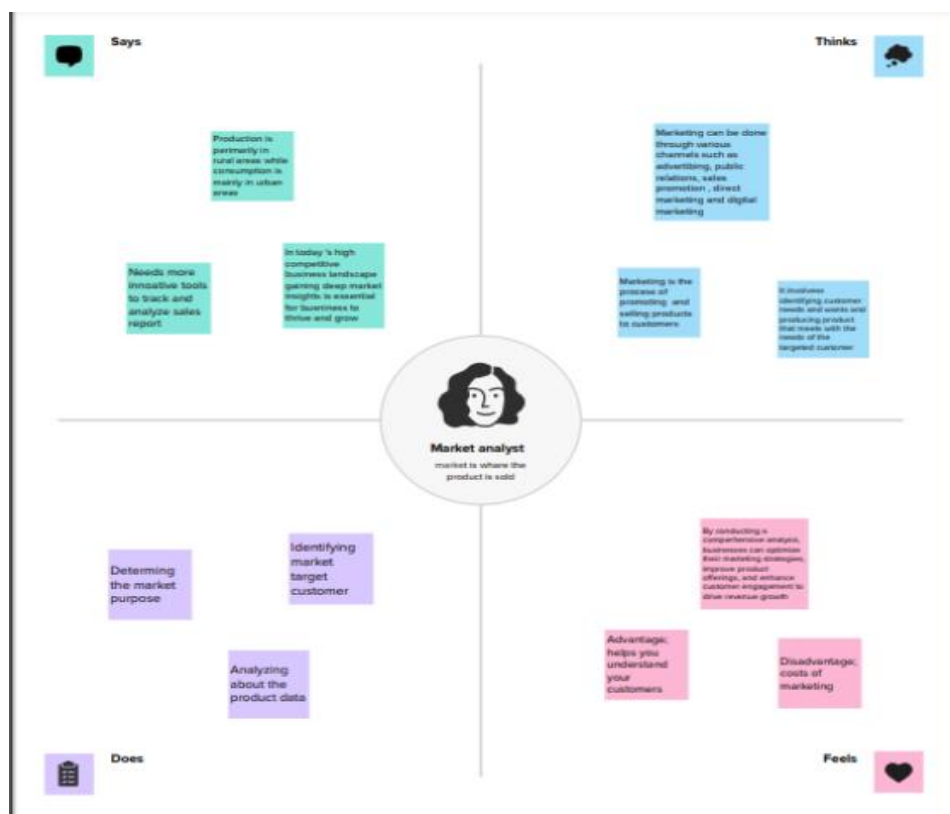
It Help you better understand your customers. Here's a template to get you started Use this template to gather insights and data about your wholesaler customers, which can inform your analysis and decision-making.

**Says:** List what your customers say about your wholesaler business. This can include feedback, complaints, and comments.

**Thinks:** Try to understand what might be going on in your customers' minds. What are their thoughts and concerns when dealing with your business?

**Feels:** Describe the emotions your customers might experience. Are they satisfied, frustrated, or indifferent?

**Does:** Document the actions your customers take. What steps do they go through when interacting with your wholesaler services?



### Brainstorming and Idea Prioritization:

A creative and productive way to generate insights. Here are some ideas to get you started

Create and distribute surveys to your customers to gather feedback on their needs, preferences, and pain points.

Divide your customer base into segments based on various criteria (e.g., demographics, purchase behavior) to tailor your strategies.

Analyze your competitors' customer strategies to identify gaps or opportunities for improvement.

Monitor social media platforms for mentions and discussions about your business to understand customer sentiment.

Conduct one-on-one interviews with a sample of your customers to gain deeper insights into their experiences.

Utilize data analytics tools to analyze historical sales data, customer behavior, and trends.

Use mystery shoppers to evaluate the customer experience and service quality in your business.

Perform a SWOT analysis specifically focused on your customer relationships, highlighting strengths, weaknesses, opportunities, and threats.



### 3. Data Preparation

**Data Source:**Data sources for your Wholesaler Customer Analysis project can come from various channels. Here are some common data sources to consider

1. Customer Databases
2. Surveys and Feedback
3. Social Media
4. Website Analytics
5. Sales Data
6. CRM Systems
7. Competitor Analysis
8. Email and Communication Data
9. Market Research Reports

### Data Cleaning and Transformation

**Data Collection:**Gather all relevant data sources, including customer information, transaction history, surveys, feedback, and any other data that may be valuable for your analysis.

**Data Cleaning:**Check for and handle missing data, duplicate records, and outliers. Ensure that your data is accurate and complete.

**Data Integration:**If your data is stored in different formats or databases, integrate it into a single, coherent dataset. Ensure consistent formats and variables.

**Data Transformation:**Perform necessary data transformations, such as converting data types, normalizing data, and creating derived variables. This step may involve standardizing names, addresses, or product codes.

**Data Sampling:**If your dataset is very large, consider taking a random sample to make processing and analysis more manageable.

**Data Encoding:**Encode categorical data into numerical values if needed, using techniques like one-hot encoding or label encoding.

**Feature Engineering:**Create new features or variables that might be relevant to your analysis. For example, you could calculate customer lifetime value, purchase frequency, or segment customers based on certain criteria.

**Data Splitting:**Divide your dataset into training and testing sets. The training set will be used to build models or conduct analyses, while the testing set is reserved for validation.

**Data Scaling:** Normalize or standardize numerical features to ensure they have the same scale, which is important for some types of analyses, such as clustering or regression.

**Data Documentation:** Create a data dictionary that describes the variables, their meanings, and any transformations made. Document your data preparation steps for future reference.

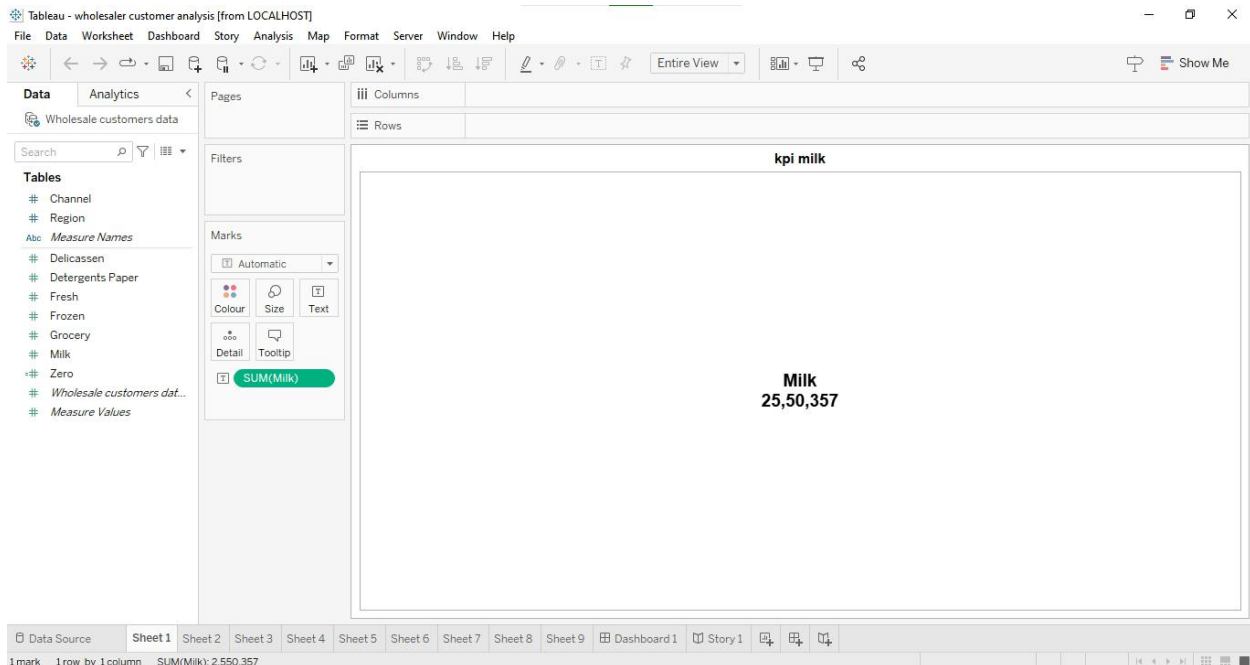
**Backup and Version Control:** Keep a backup of the original data and consider implementing version control to track changes made during the data preparation process.

**Data Quality Check:** Double-check the quality and integrity of your data after these steps. Ensure it's ready for analysis and that it aligns with your project objectives.

## 4. Worksheets Section

### Worksheet 1: KpI's (Milk)

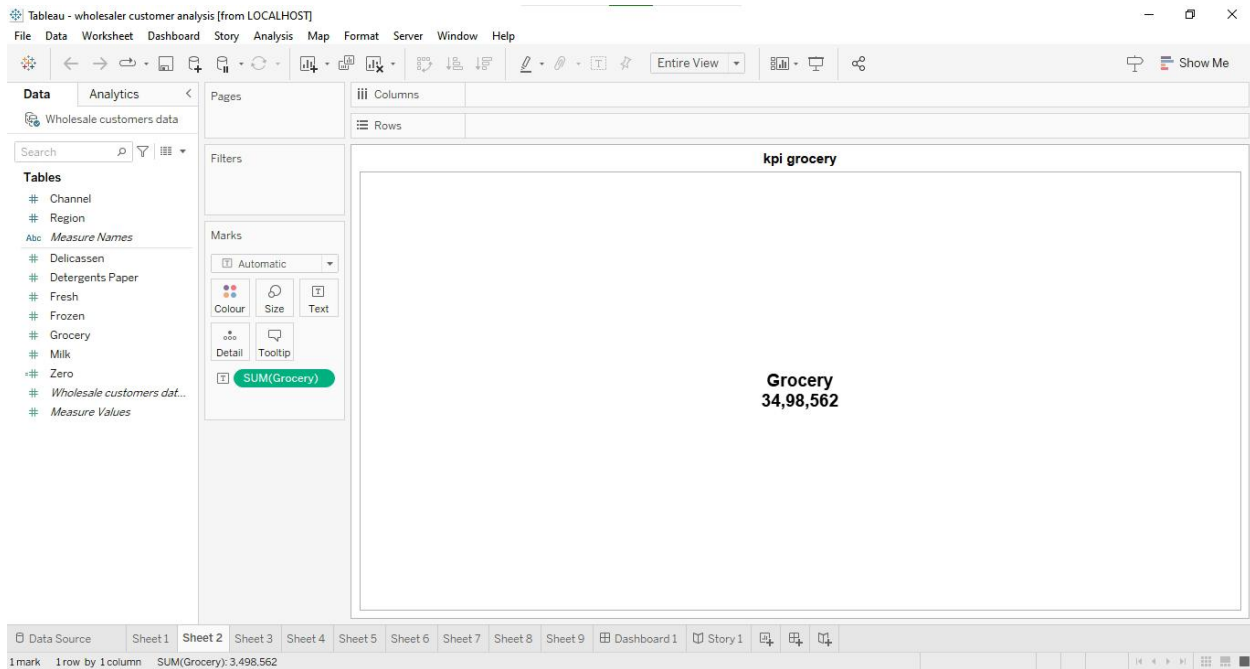
Tableau worksheet focused on KPIs (Key Performance Indicators) for your Wholesaler Customer Analysis project, you'll want to create visualizations that represent important metrics. Here are some examples of KPIs you might consider and how to visualize them:



Visualization: Line chart showing the trend in milk product sales over a selected time period.



## Worksheet 2:Kpl's (Grocery)

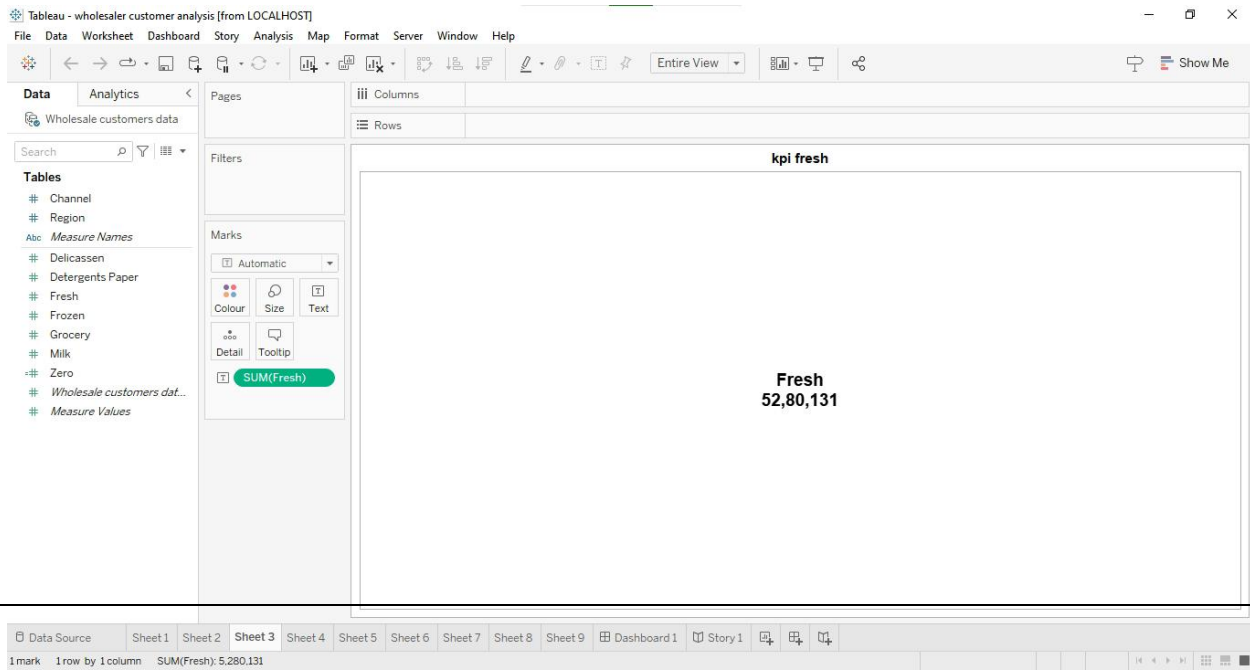


Visualization: Line chart showing the trend in sales of grocery products over a selected time period.

## Worksheet 3:Kpl's (Fresh)

Visualization: Line chart showing the trend in sales of fresh produce products over a selected time period.

For each of these KPIs, you can create customized Tableau visualizations to effectively communicate the data and insights. Remember to provide context and annotations to explain the significance of each KPI in the context of your wholesaler

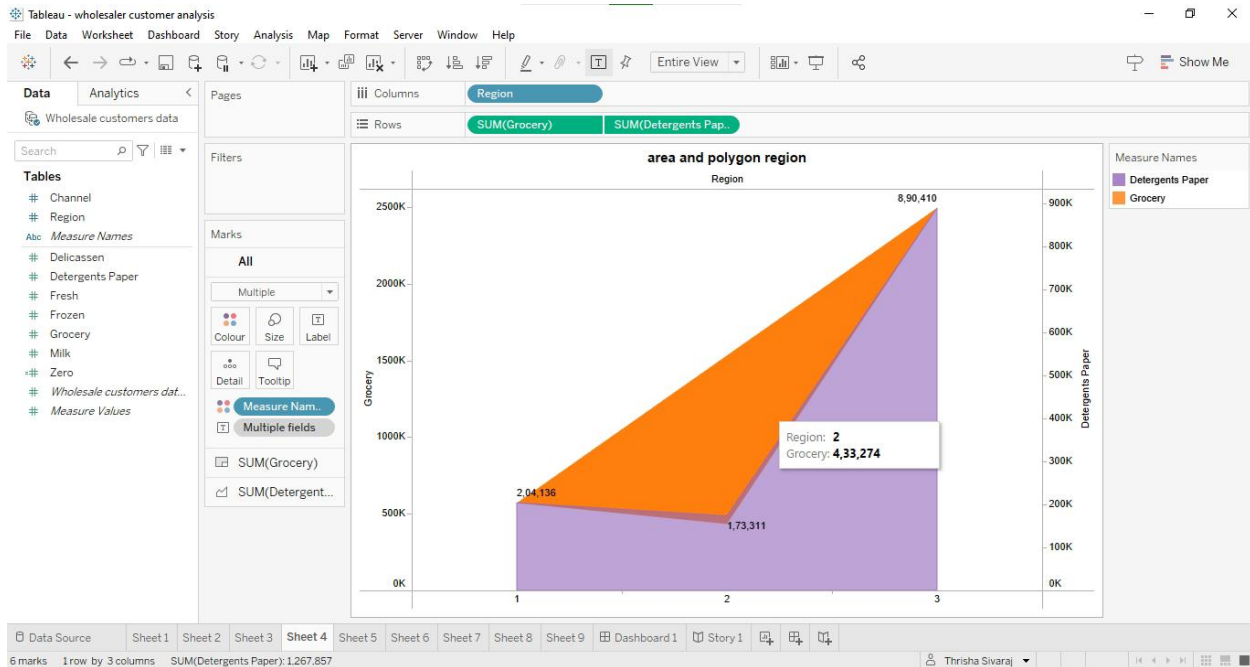




business.

## **Worksheet 4:Area and Polygon region**

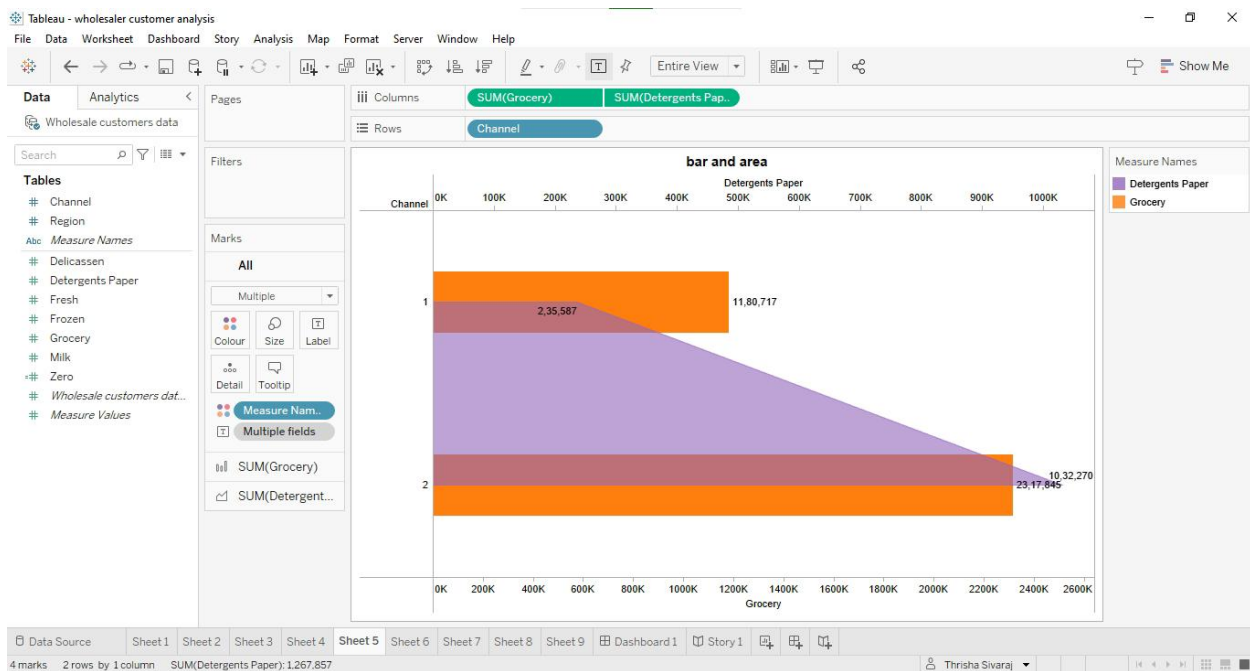
Import or connect spatial data that includes information about the areas and polygon regions you want to analyze. This data could represent territories, sales regions, store locations, or any other relevant geographic regions.



## **Worksheet 5:Bar and area**

**Bar Chart Creation:**Create a bar chart to display your primary data series. This chart can represent the main KPI you want to showcase. For instance, if you're analyzing monthly sales, the bars could represent sales figures for each month.

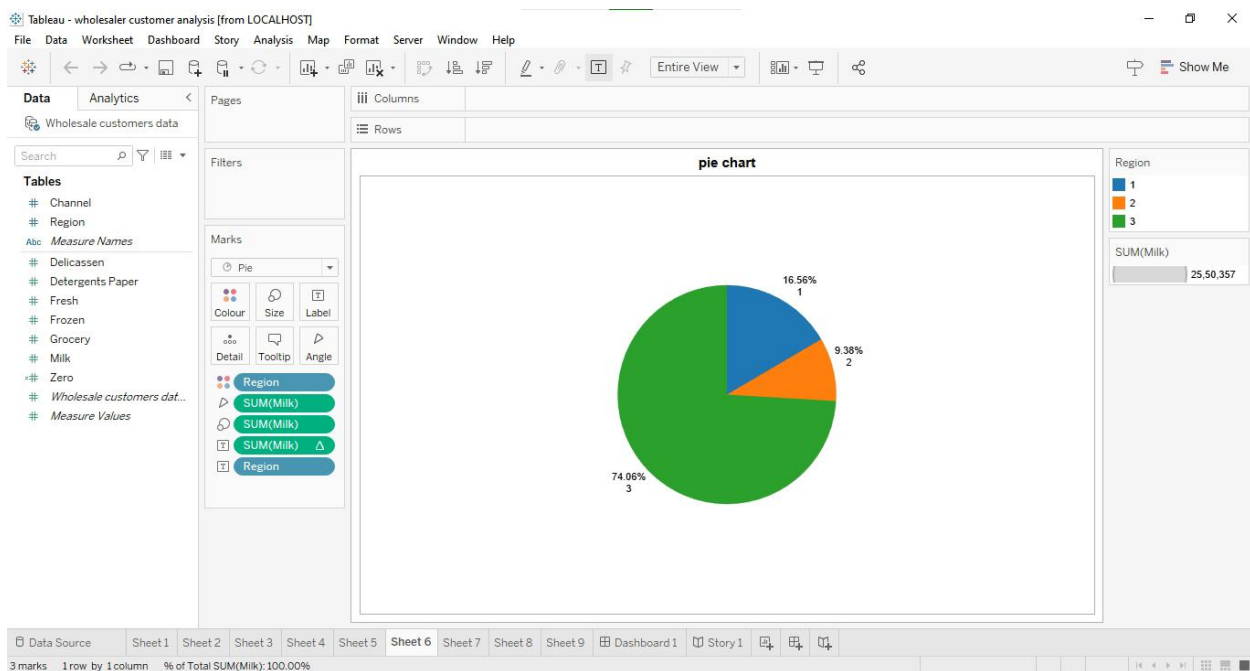
**Area Chart Addition:**Overlay an area chart on top of the bar chart. The area chart could represent a secondary metric or data series related to the same time period. For instance, it could be used to show the trend of profit margins over the same months as the sales data.



## Worksheet 6: pie chart

Create a pie chart in Tableau. In the “Marks” card, select “Pie” as the chart type.

The most popular in region 3 only

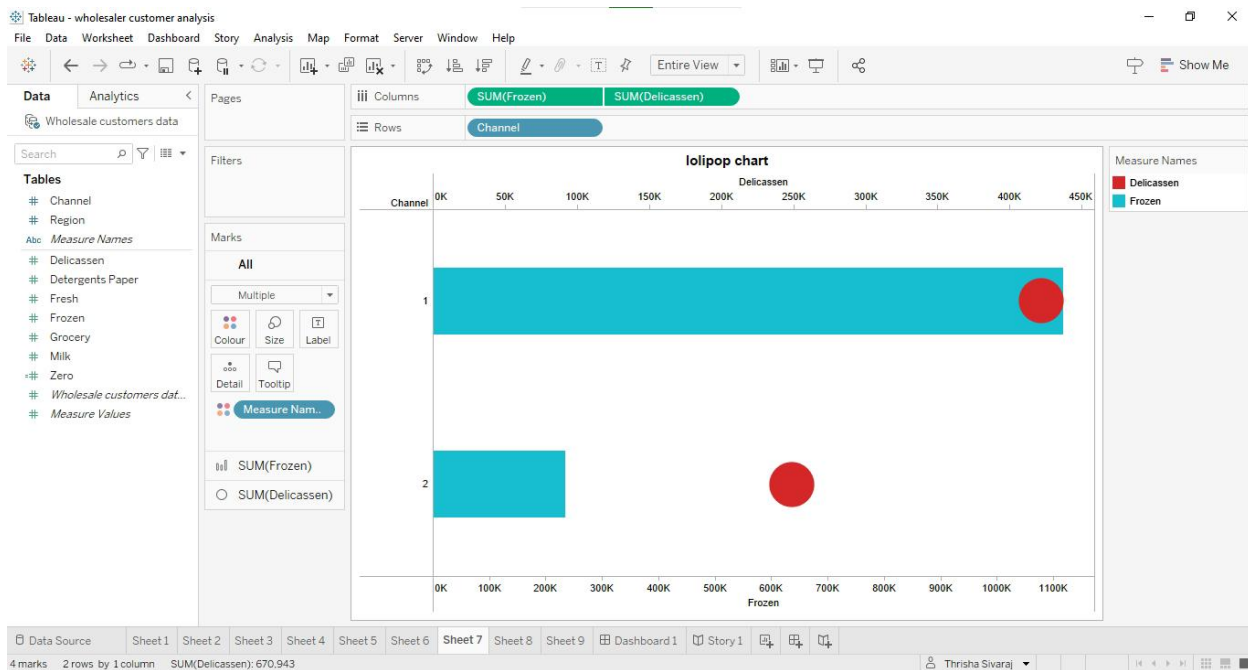


Pie charts are best suited for showcasing parts of a whole and are particularly effective when you want to highlight the relative proportions of different categories

or components. In your Wholesaler Customer Analysis project, consider using pie charts when you need to illustrate the distribution of customer segments, product categories, or other categorical data.

## **Worksheet 7:lollipop chart**

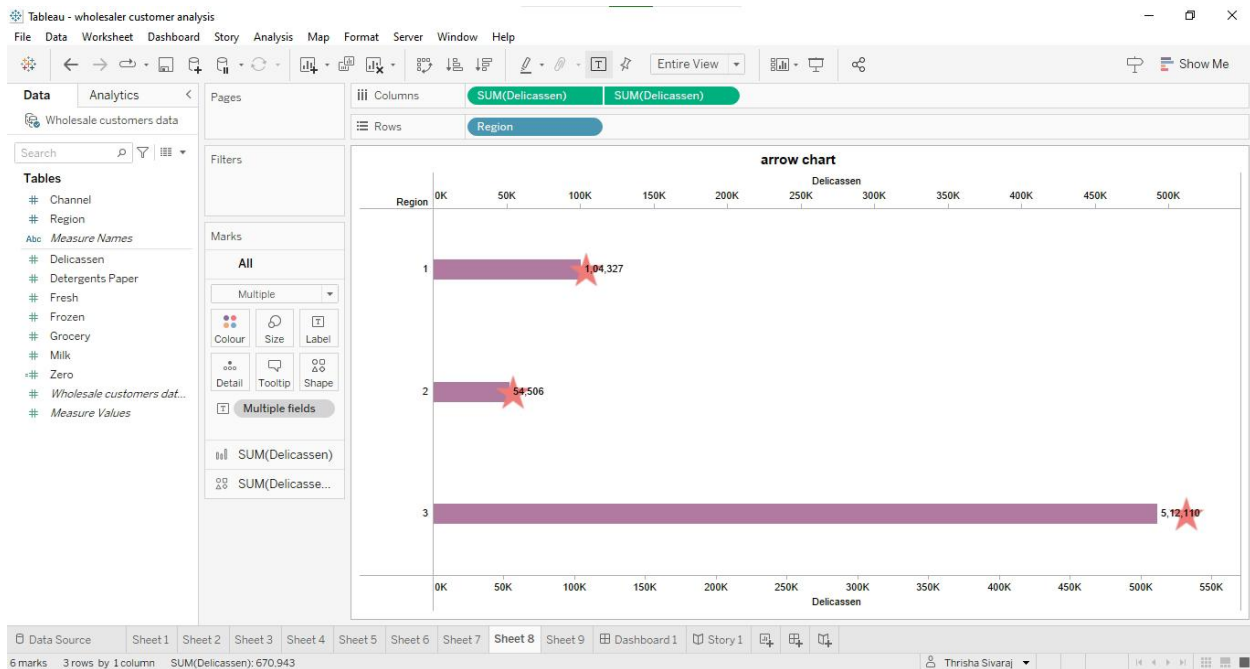
Create a lollipop chart in Tableau. To do this, select “Circle” or “Shape” as the mark type and use a vertical or horizontal axis to display your data points.



Lollipop charts are particularly effective when you want to compare individual data points within categories, show rankings, or highlight key data points of interest. In your Wholesaler Customer Analysis project, consider using lollipop charts to compare metrics such as individual sales figures, customer ratings, or performance benchmarks.

## Worksheet 8: Arrow Chart

To create an arrow chart in Tableau, you'll need to use the "Dual-Axis" feature. The first axis represents the starting point, and the second axis represents the ending point. You can use a combination of bar charts, reference lines, and shapes to create the arrow effect.

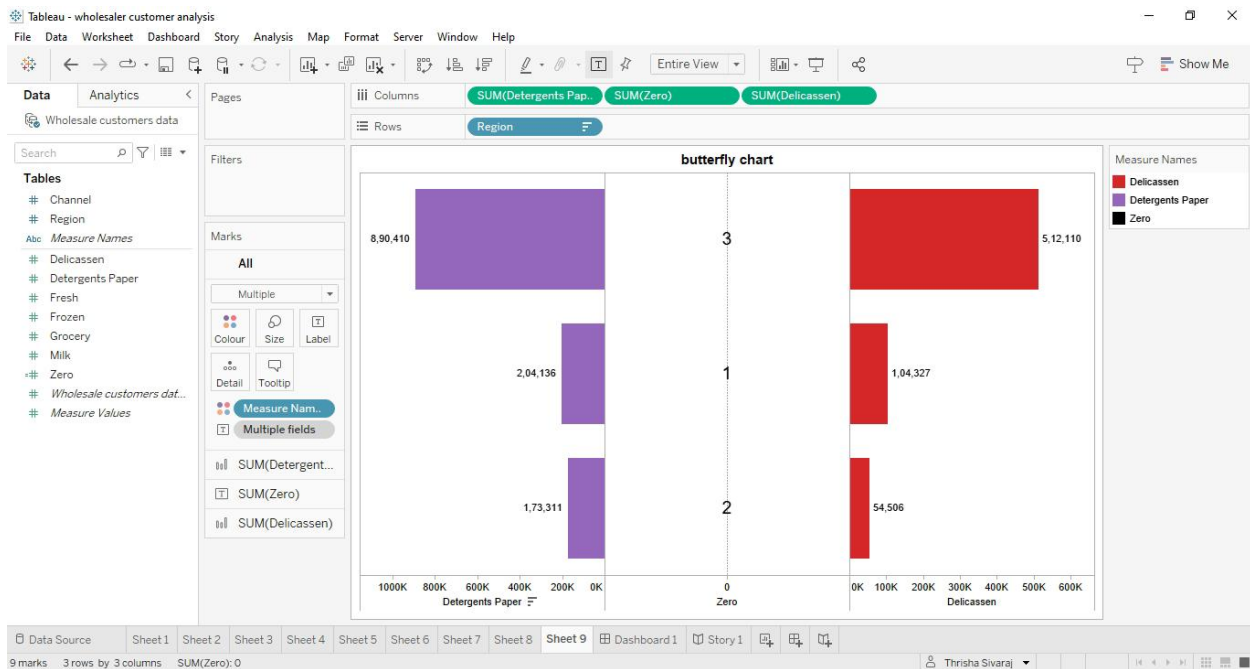


Arrow charts are especially effective when you want to show the change or trend between two points in your data, such as revenue growth or performance improvement. In your Wholesaler Customer Analysis project, consider using arrow charts to visualize and compare changes in key metrics over time or across different categories.

## Worksheet 9: Butterflychart

Create a butterfly chart in Tableau by using a horizontal bar chart. You'll have one bar for each variable. The bar is divided into two parts: one representing the positive impact and the other the negative impact.

Butterfly charts are particularly effective for conducting sensitivity analyses and comparing the impact of different variables on a specific KPI. In your Wholesaler Customer Analysis project, consider using butterfly charts to evaluate the sensitivity of key performance metrics to various factors, such as pricing changes, marketing efforts, or product features.



## 5. Dashboard Creation

### Overview of the Dashboard:

A project dashboard in Tableau can be a comprehensive way to display all the visualizations and data insights from your Wholesaler Customer Analysis project. Below is a general outline of how you can structure your dashboard

**Title and Introduction:** Begin with a title and brief introduction to your project. Explain the purpose and objectives of the dashboard.

**Project Summary:** Provide a high-level summary of your project's key findings, goals, and current status.

**KPI Overview:** Include an area or set of visualizations that showcase the most important Key Performance Indicators (KPIs) for your project, such as customer growth, sales trends, and customer satisfaction.

**Category-Specific Visualizations:** Organize your dashboard by different categories, such as "Milk," "Grocery," and "Fresh." Within each category, include relevant visualizations, like bar charts, pie charts, or arrow charts.

**Regional Analysis:** If relevant, include visualizations that focus on geographic or regional data, such as area and polygon charts, or lollipop charts.

**Comparison Charts:**Incorporate comparison visualizations, such as butterfly charts, to analyze the impact of different variables or factors on specific KPIs.

**Customer Segmentation:**Use visualizations to highlight customer segmentation, personas, and preferences in a dedicated section.

**Time Series Analysis:**Present time-based data, like sales trends over time, with line charts or area charts.

**Interactive Filters:**Implement filters or parameters to allow users to interact with the dashboard. This enables them to select specific categories, time periods, or variables for deeper analysis.

**Annotations and Insights:**Include annotations and text to provide context, insights, and explanations for the data visualizations on the dashboard.

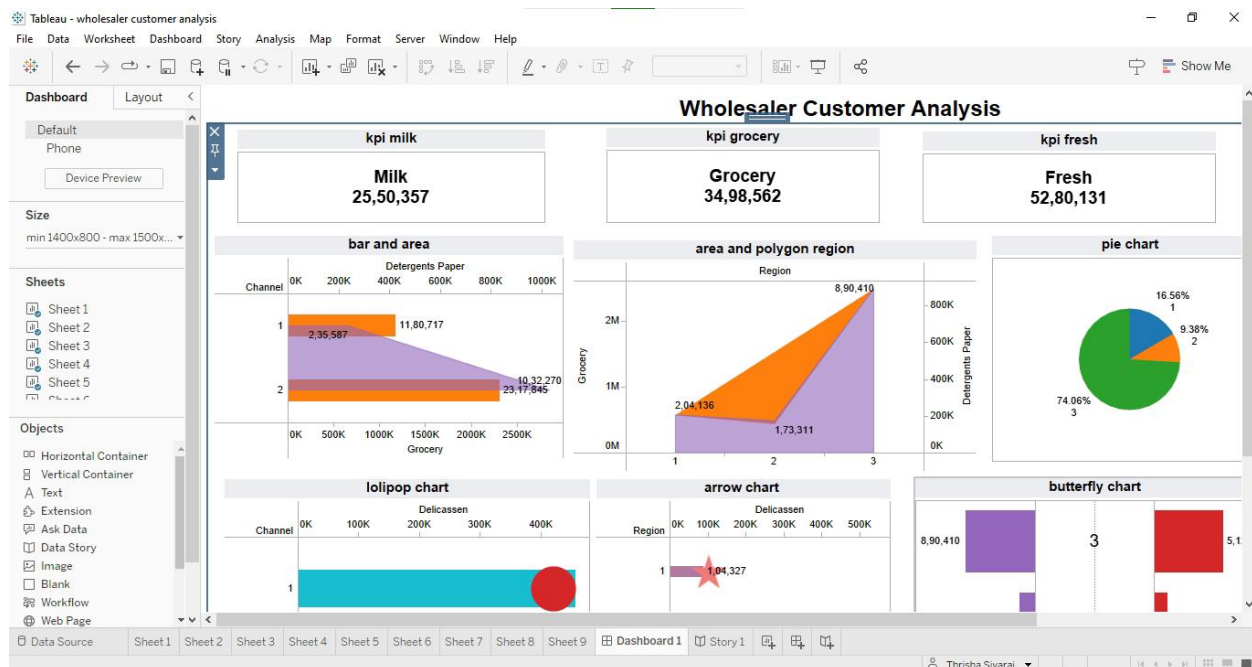
**Data Sources and References:**Include information about the data sources, data preparation methods, and references used in your analysis.

**Concluding Remarks:**Wrap up your dashboard with a summary of the key takeaways, any action items, and the implications of your analysis.

**Contact Information:**Provide contact details in case viewers have questions or need further information about your project.

**Data Source and VersionControl:**Mention your data source, and if applicable, include version control information for future reference.

**Data Last Updated:**Display the date when the data was last updated to ensure users are working with the most current information.



Remember to customize your dashboard to meet the specific needs of your Wholesaler Customer Analysis project. Tailor the visualizations and structure based on your project's objectives and the preferences of your audience. Tableau offers a wide range of customization options to help you design an informative and visually appealing dashboard.

## 6. Storytelling

In your project, we delve into the intricacies of the wholesaler business, analyzing different product categories, customer segments, and geographic regions to gain valuable insights that can shape decision-making.

### **Analyzing Milk :**

We begin by analyzing the Milk category. Milk sales trends over time reveal that demand has steadily increased. Our KPIs indicate that customer satisfaction and retention have improved, likely due to quality and freshness.

### **Exploring Grocery:**

Shifting our focus to Grocery products, we observe a different pattern. While sales have been consistent, profitability is impacted by fluctuations in supplier performance. We must ensure steady supplier quality and delivery.

### **Fresh Category Insights:**

Fresh products present unique challenges. Sales trends reveal seasonal variations. Quality control is vital in this category. We identify opportunities to minimize waste and spoilage while enhancing customer experience.

### **Regional Analysis :**

The Area and Polygon region analysis helps us understand geographic patterns. Some regions show exceptional growth, while others face challenges. This information informs targeted marketing and logistics strategies.

### **Bar and Area Charts :**

Combining bar and area charts, we see a broader perspective. Sales trends and profitability are compared. We're making informed decisions to balance growth and profitability.

### **Customer Preferences :**

The pie chart uncovers customer preferences, especially in the Dairy category. This information guides marketing campaigns, ensuring we meet customer needs and enhance loyalty.

### **Lollipop Chart Insights :**

The lollipop chart highlights specific data points within customer ratings. We find that our Fresh category shines in customer satisfaction, while we identify areas in Grocery for improvement.

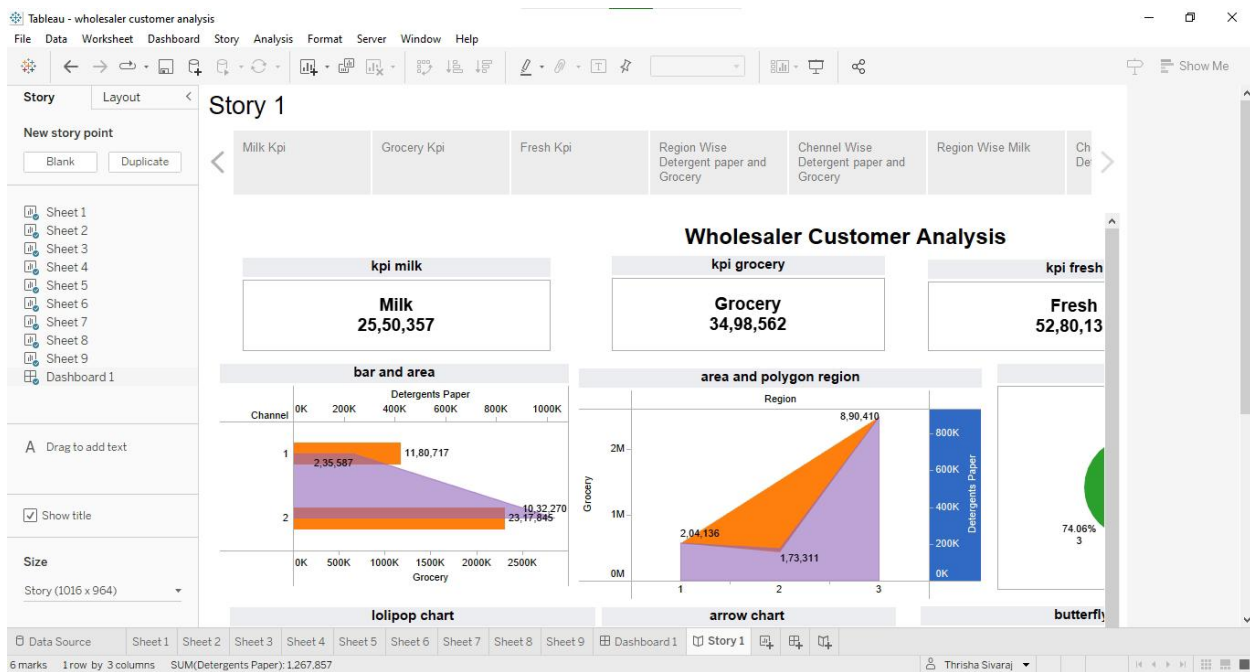


## Understanding Sensitivity :

Sensitivity analysis with an arrow chart showcases how factors impact KPIs. We're sensitive to pricing, knowing that slight changes can significantly affect our business.

## Evaluating Impact :

The Butterfly chart provides a clear understanding of variable impact. It's crucial to balance the positive and negative factors, aligning with our overall goals.



## 7. Data Analysis and Insights

**Sales Trends:** The Milk category has shown steady sales growth over the past year, with a clear seasonal pattern, peaking during certain months. This trend indicates strong customer demand for milk products. **Customer Satisfaction:** Customer satisfaction in the Milk category has consistently improved over time. This suggests that customers are happy with the quality of milk products and the service provided. It's important to maintain this high level of satisfaction to retain customers.

**Steady Sales, Variable Profitability:** Grocery sales have remained relatively stable over time. However, profitability varies due to fluctuations in supplier

performance. This emphasizes the need to closely monitor and improve supplier relationships to ensure consistent profitability.

**Seasonal Sales Patterns:** The Fresh category displays noticeable seasonal sales patterns, with significant demand fluctuations throughout the year. This seasonality impacts inventory management and ordering strategies. **Quality Control is Key:** Customer satisfaction in the Fresh category is closely tied to product freshness and quality. Maintaining strict quality control is essential to sustain customer satisfaction and loyalty.

**Regional Growth Opportunities:** Analysis of different regions reveals varying growth patterns. Some regions show exceptional growth potential, while others present challenges. These insights can inform targeted marketing, distribution, and sales strategies.

**Sales vs. Profitability:** Comparing sales and profitability trends highlights areas where increased sales might not necessarily lead to increased profits. It's important to identify and address factors affecting profitability in these areas.

**Customer Preferences:** The pie chart illustrates strong customer preferences for specific dairy products. These insights guide marketing campaigns and inventory management to cater to customer demands effectively.

**High Customer Ratings:** The lollipop chart identifies specific products with consistently high customer ratings. Notably, the Fresh category stands out with strong customer satisfaction.

**Sensitivity to Pricing:** The arrow chart highlights the sensitivity of key performance indicators to pricing changes. This information underscores the importance of carefully managing pricing strategies to optimize sales and profitability.

**Balancing Factors:** The butterfly chart provides a clear understanding of how both positive and negative factors impact key performance indicators. Balancing these factors is crucial for achieving business goals.

**Actionable Insights:** Based on the analysis, it's clear that maintaining high product quality, managing supplier performance, optimizing logistics and distribution, and implementing pricing strategies aligned with sales and profitability goals are critical. Additionally, focusing on customer preferences

and maintaining high customer ratings, especially in the Fresh category, can enhance customer loyalty and drive business growth.

## 8. Conclusion

**Recap of Project Goals:** Begin by reiterating the main objectives and goals of your project. Remind your audience why this analysis was undertaken in the first place.

**Summary of Key Findings:** Summarize the most critical insights and findings from your analysis. Highlight the trends, patterns, and data points that have the most significant impact on your business.

**Data-Driven Decision-Making:** Emphasize the importance of data-driven decision-making in your conclusions. Explain how the analysis has provided valuable insights to guide future actions.

**Actionable Recommendations:** Provide a set of clear and actionable recommendations based on your analysis. These should be specific steps or strategies that the business can implement to leverage the insights you've uncovered.

**Implications for the Business:** Discuss the broader implications of your analysis for the wholesaler business. How will these insights impact product categories, customer relationships, supplier management, and profitability?

**Areas of Improvement:** Be transparent about any challenges or limitations encountered during the analysis. This can include data quality issues, incomplete data, or other obstacles that affected the analysis.

**Future Directions:** Highlight potential future directions for the project. Are there areas that require further analysis or follow-up studies? What should the business focus on next?

**Acknowledgments:** If applicable, acknowledge the contributions of team members, collaborators, or data sources. Express appreciation for their support and involvement in the project.

## 9. Appendix

**Dashboard link :**

[https://public.tableau.com/views/wholesalercustomeranalysis\\_16967391028560/Dashboard1?:language=en-GB&publish=yes&:display\\_count=n&:origin=viz\\_share\\_link](https://public.tableau.com/views/wholesalercustomeranalysis_16967391028560/Dashboard1?:language=en-GB&publish=yes&:display_count=n&:origin=viz_share_link)

**Story link :**

[https://public.tableau.com/views/wholesalercustomeranalysis\\_16967391028560/Story1?:language=en-GB&publish=yes&:display\\_count=n&:origin=viz\\_share\\_link](https://public.tableau.com/views/wholesalercustomeranalysis_16967391028560/Story1?:language=en-GB&publish=yes&:display_count=n&:origin=viz_share_link)