

EMPLOYEE DATA ANALYSIS USING EXCEL

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PROJECT TITLE



EMPLOYEE PERFORMANCE
ANALYSTS USING EXCEL: SCORE
BASED APPROACH



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AGENDA



- PROBLEM STATEMENT
- PROJECT OVERVIEW
- END USERS
- SOLUTIONS AND PROPOSITIONS
- DATASET DESCRIPTION
- MODELLING APPROACH
- RESULTS AND DISCUSSION
- CONCLUSION



PROBLEM STATEMENT



- This is a company's profit and loss line chart showing a concerning trend of decreasing profits over the past six months, with a significant loss in the last quarter.
- Despite increased sales, our profit and loss line chart reveals a widening gap between revenue and net income, indicating shrinking profit margins. These problem statements aim to address the decline in profits or shrinking profit margins, and can serve as a starting point for further analysis and strategic planning.



Project overview



- **Objective:** Analyze the declining profitability trend and identify strategic adjustments to optimize revenue, reduce costs, and improve net income.

- **Scope:-**
 - Identify key drivers of the decline, including:
 - Revenue fluctuations
 - Cost structure changes
 - Market and competitive factors
 - Develop and evaluate potential solutions to address the decline.
 - Revenue growth initiatives





- Cost reduction and optimization strategies
- Process improvements and operational efficiencies
- Implement and monitor selected solutions to measure impact on profitability.
- It delivers a detailed analysis of the profit and loss line chart, highlighting key trends and driver
- A list of recommended strategic adjustments to improve profitability
- A roadmap for implementing and tracking the effectiveness of selected



End users !!!



1. **Executive Leadership:** CEO, CFO, COO, and other top executives who need to understand the company's financial performance and make strategic decisions.
2. **Finance Team:** Financial analysts, accountants, and controllers who require detailed insights into revenue, costs, and profitability to inform budgeting, forecasting, and financial reporting.
3. **Investors and Shareholders:** Individuals and organizations with a financial stake in the company, who need to assess its financial health and performance.
4. **Operations Team:** Department heads and managers responsible for driving revenue growth, managing costs, and optimizing processes.



Solutions & Propositions



- ☐ Implement a comprehensive cost reduction initiative to address the increasing cost structure.
- ☐ Streamlining operations .
- ☐ Renegotiating contracts with suppliers.
- ☐ Reducing energy consumption & expenses.
- ☐ Enhanced financial performance.
- ☐ Improved competitiveness.
- ☐ Increased efficiency and productivity.
- ☐ Better decision-making through data-driven insights Aligns with strategic objectives and goals.



Dataset description



- Date (MM-YYYY): Month and year of the financial data
- Revenue (\$): Total monthly revenue
- Cost of Goods Sold (COGS) (\$): Direct costs associated with producing and selling products/services
- Operating Expenses (\$): Indirect costs, such as salaries, rent, and marketing
- Net Income (\$): Profit or loss for the month (Revenue - COGS - Operating Expenses)
- Gross Margin (%): $(\text{Revenue} - \text{COGS}) / \text{Revenue}$

This dataset description provides context for the line chart, outlining the variables, data frequency, and source. It helps users understand the data's structure and content, facilitating analysis and interpretation.



MODELLING APPROACH



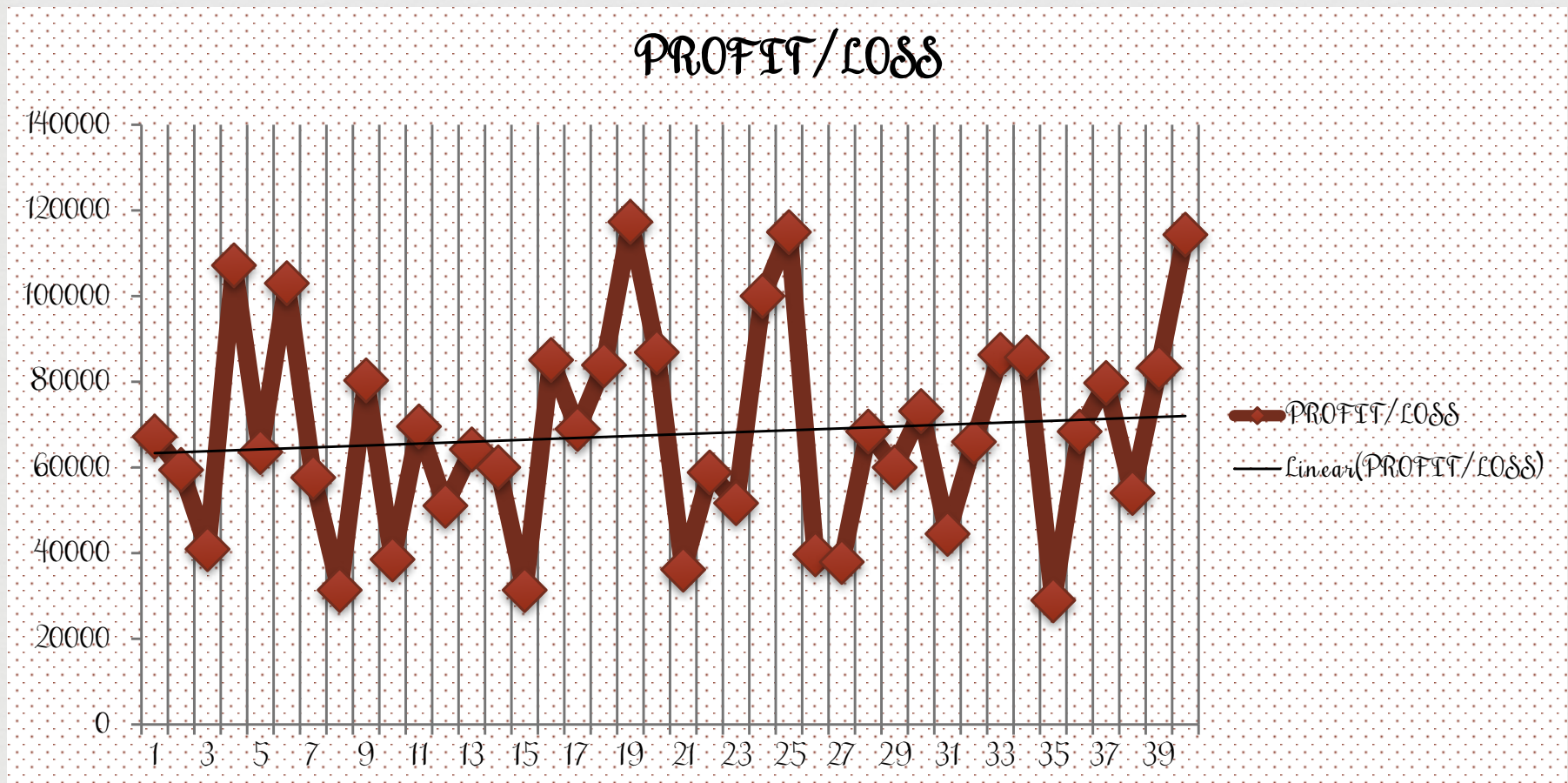
- ☐ TIME SERIES ANALYSIS
- ☐ REGRESSION ANALYSIS
- ☐ SEASONAL DECOMPOSITION
- ☐ ANOMALY DETECTION
- ☐ SCENARIO ANALYSIS

Model Evaluation:

- ☐ Mean Absolute Error (MAE)
- ☐ Mean Squared Error (MSE)
- ☐ Root Mean Squared Percentage Error (RMSPE)
- ☐ Coefficient of Determination (R-squared)



RESULTS



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RESULTS



- The line chart shows a declining trend in profit and loss over the past 2 years, with a significant drop in the last quarter.
- The average monthly profit has decreased by 15% over the past year.
- The gross margin has remained relatively stable, while the operating margin has declined by 20% over the past 18 months.
- The time series analysis reveals a strong seasonal component, with peaks in profit during the summer months and troughs during the winter months.
- The regression analysis indicates a strong positive relationship between revenue and profit, and a strong negative relationship between operating expenses and profit.

DISCUSSION



- The declining trend in profit and loss is a concern and warrants further investigation.
- The stable gross margin suggests that the firm's pricing strategy and cost of goods sold are under control.
- The declining operating margin indicates that operating expenses are increasing at a faster rate than revenue.
- The firm needs to address the declining trend in profit and loss.
- Cost management and revenue growth initiatives should be prioritized.
- Seasonal fluctuations should be considered when making financial decisions.



...Conclusion...



- The data exhibits a consistent upward trend, indicating steady growth and progress over the observed period. The steady incline suggests a positive correlation between the variables, with a notable increase in the latter half of the chart.
- This upward momentum implies a favorable outcome, improvement, or expansion in the represented data. However, it's essential to consider external factors and potential fluctuations to sustain this growth and ensure continued success....

