

## Project #2: Sales Performance Analysis

Tableau Public Link for Project :

<https://public.tableau.com/profile/vaibhav.bajaj#!/vizhome/TableauProjectSalesSamplesuperstore/Dashboard1?publish=yes>

### General Background:

Mike Goodman, the head of Product Management of a retail products company, is responsible for determining which products his company should continue to offer for sale and which products should be discontinued from the company's product catalog.

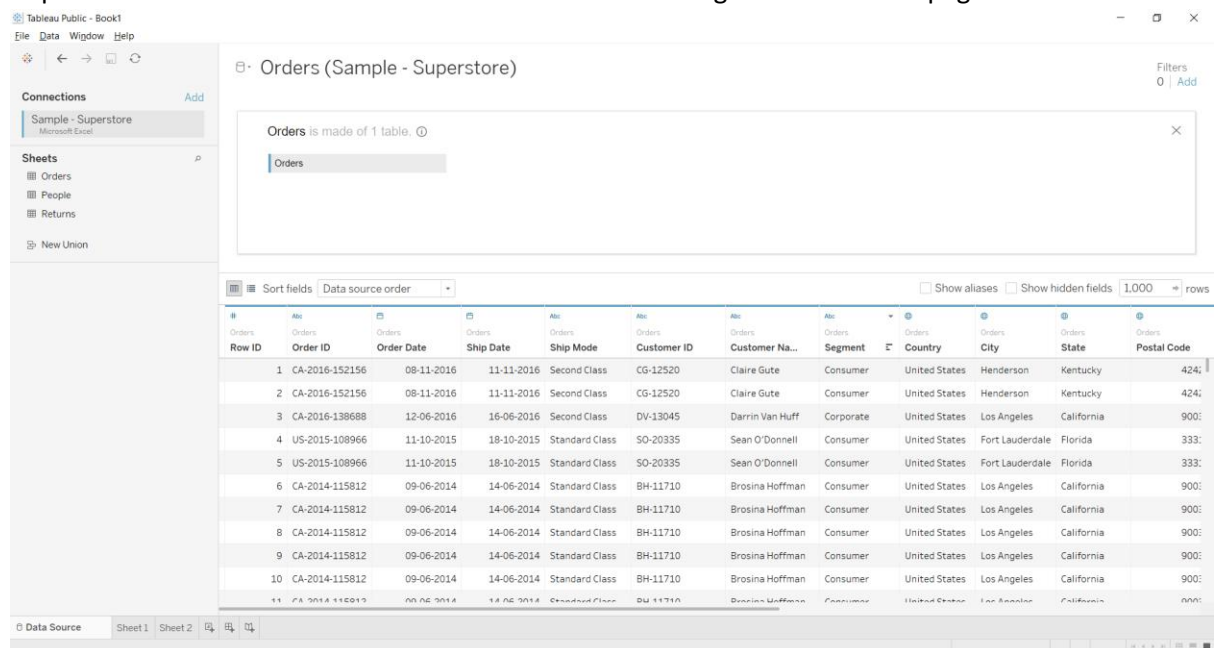
### Objective of the Project:

To build a dashboard that will present monthly sales performance by product segment and product category to help client identifying the segments and categories that have met or exceeded their sales targets, as well as those that have not met their sales targets.

### Analysis Tasks:

#### 1. Use the Saved Sample – Superstore dataset.

Imported the above data set as seen in the screenshot using the data source page.



Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Postal Code
1	CA-2016-152156	08-11-2016	11-11-2016	Second Class	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	424
2	CA-2016-152156	08-11-2016	11-11-2016	Second Class	CG-12520	Claire Gute	Consumer	United States	Henderson	Kentucky	424
3	CA-2016-138688	12-06-2016	16-06-2016	Second Class	DV-13045	Darrin Van Huff	Corporate	United States	Los Angeles	California	900
4	US-2015-108966	11-10-2015	18-10-2015	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	333
5	US-2015-108966	11-10-2015	18-10-2015	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	333
6	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	900
7	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	900
8	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	900
9	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	900
10	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	900
11	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States	Los Angeles	California	900

Added another connection to connect the Samples\_target.xlsx data as shown.

Data	Analytics
Orders (Sample - Superst...)	
Sales Target (Sales_Targ...)	
Search	
Tables	
Category	
Order Date	
Segment	
Measure Names	
Number of Records	
Sales Target (Sales Target)	
Sales Target (Count)	
Measure Values	

## 2. Create a bullet chart with Category and Segment dimensions and Sales measures.

Steps are shown in the screenshots below while solving other project requirements:

- Category to Columns shelf. Order date and Segment to Rows shelf as shown.

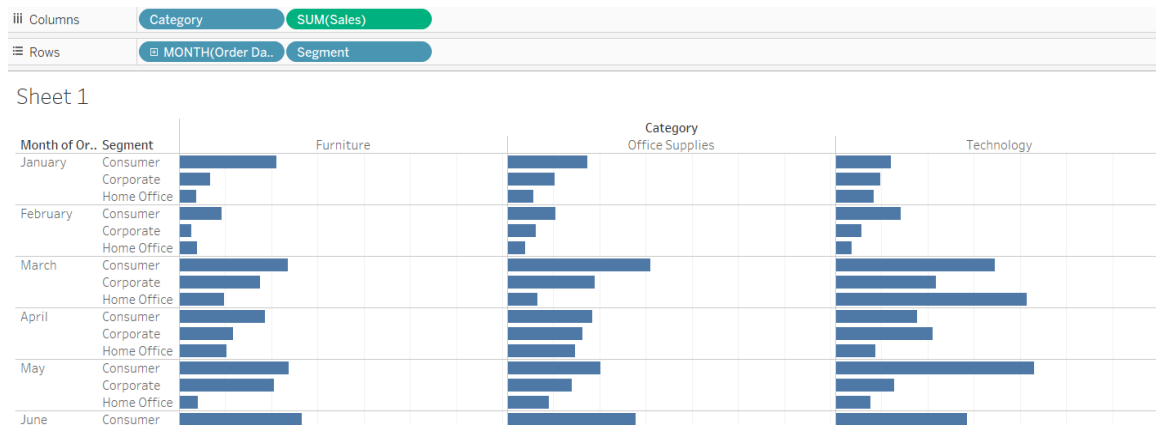
Convert Order date to months as per requirement:

Columns	Category
Rows	MONTH(Order Da.. Segment

Sheet 1		Category		
Month of Or..	Segment	Furnit..	Office..	Techn..
January	Consumer	Abc	Abc	Abc
	Corporate	Abc	Abc	Abc
	Home Office	Abc	Abc	Abc
February	Consumer	Abc	Abc	Abc
	Corporate	Abc	Abc	Abc
	Home Office	Abc	Abc	Abc
March	Consumer	Abc	Abc	Abc
	Corporate	Abc	Abc	Abc
	Home Office	Abc	Abc	Abc
April	Consumer	Abc	Abc	Abc
	Corporate	Abc	Abc	Abc
	Home Office	Abc	Abc	Abc
May	Consumer	Abc	Abc	Abc
	Corporate	Abc	Abc	Abc
	Home Office	Abc	Abc	Abc
June	Consumer	Abc	Abc	Abc
	Corporate	Abc	Abc	Abc
	Home Office	Abc	Abc	Abc
July	Consumer	Abc	Abc	Abc

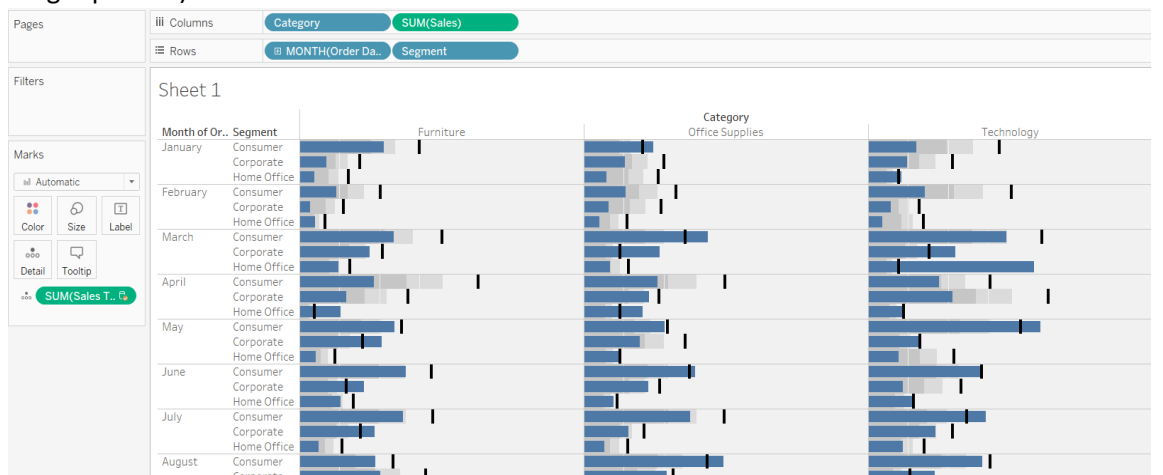
- Take Sales to Columns shelf as shown



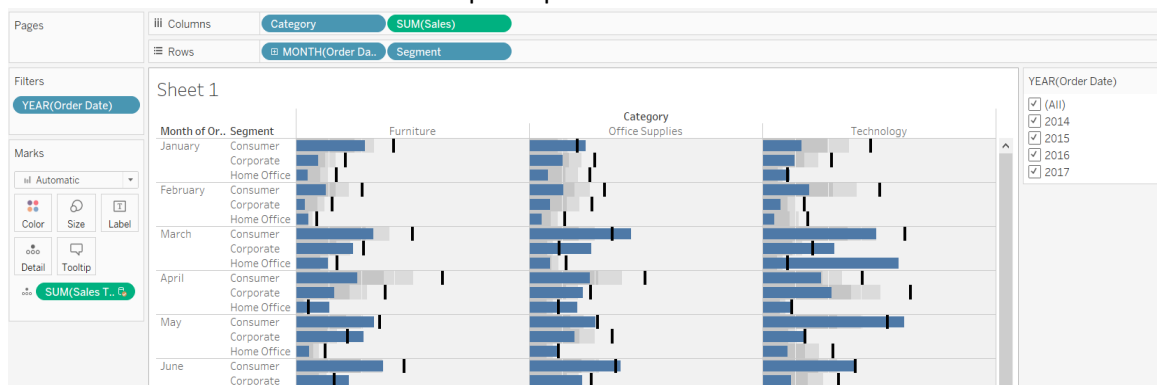
### 3. Blend the data with the Saved Sample - Sales Target data set to bring in the Sales Target measure.

Data blending would not be required here as the name of the fields are same and thus the Tableau tool will do it automatically.

- Take Sales Target from Sales\_target to Details pane and create a reference line (for avg. of sales target per cell) and reference distribution (60% to 80% of Avg. Sales Target per cell) as shown:

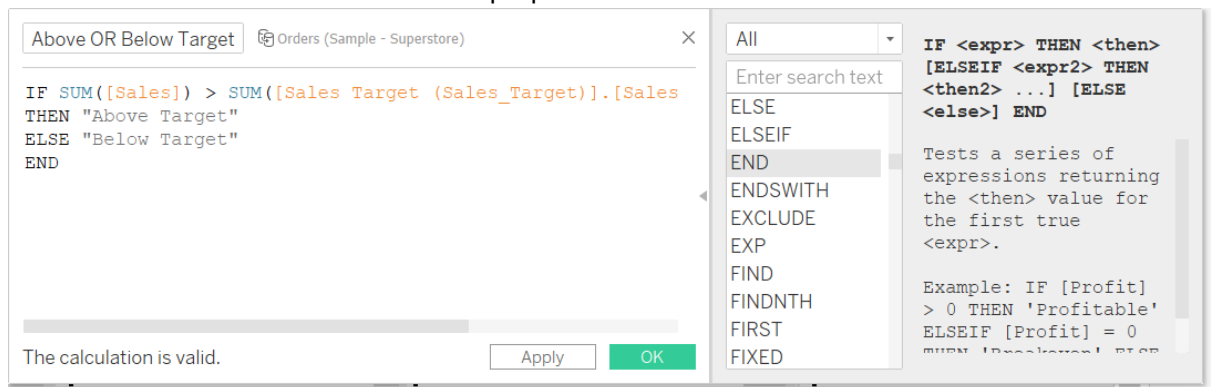


- Create a filter on Order date from Sample-Superstore.xls as shown below:

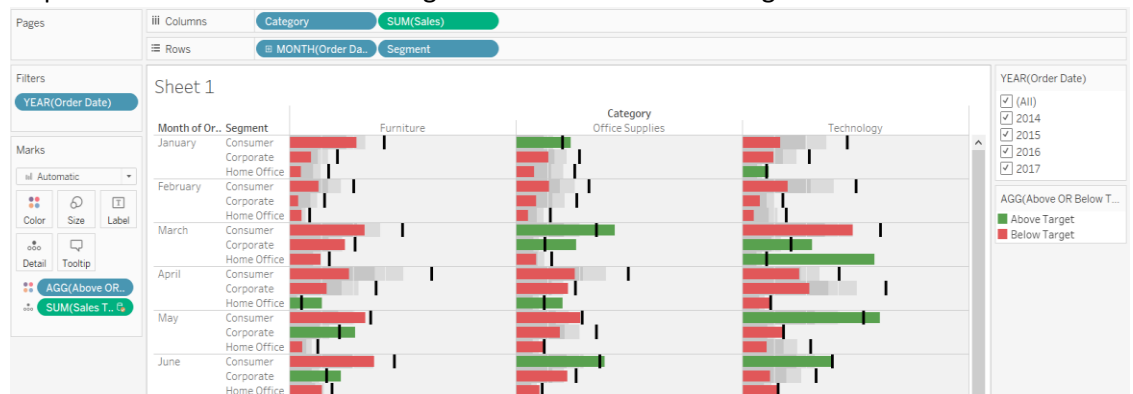


#### 4. Color code the chart to identify Categories and Segments that are above or below target.

- Create a calculated field for this purpose as shown below:

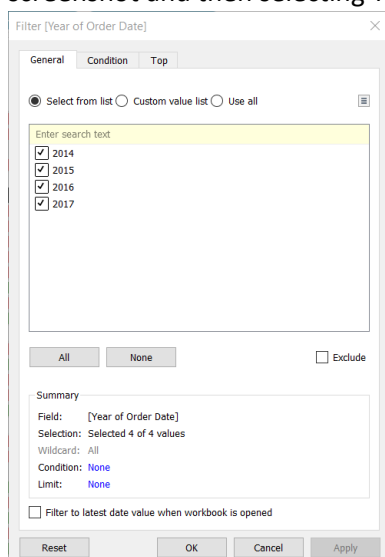


- Use this calculated field on the colors pane and set the colors according to the requirement i.e. Red for Below Target and Green for Above Target as shown:



#### 5. Add the year of sales to the view to identify trends and outliers.

Year can be added by just dragging the order date to Filters shelf as shown in the above screenshot and then selecting Year and All as the years to show.



#### 6. Add a filter so that the user can select one, more than one, or all years.

Just select show filter and then you should be able to see multiple selection of years in the filters on the right hand side as shown in the screenshots above.

#### 7. Create a dashboard with this view.

Create a new dashboard and drag the sheet to the dashboard. Select size of the dashboard as Automatic for proper view of the results as shown:

