

**CoachX**

# Financial Analysis Project

Comprehensive Analysis & Insights

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Batch: CX-143

# Introduction & Objectives

## Introduction

This project evaluates the performance of Style Advisors based on multiple criteria such as store ambiance, first impressions, discovery of needs, trial experience, and overall customer service.

## Objectives

- Grade Style Advisors based on evaluation scores.
- Analyze performance across different zones.
- Identify regions with the highest share of high performers.
- Visualize performance trends and criteria scores.
- Provide insights and actionable recommendations.

# Data Overview

**Dataset size:** 61 evaluations × 82 columns.

## Key Columns:

- Evaluation\_ID, Evaluation\_Date, Evaluation\_Score
- Defines Locations: Zone, City, State, Country
- Criteria like *Store Ambiance, First Impressions, Discovery, Trial Experience, Objection Handling, Closure & Care.*
- Demographics of auditors (Age, Gender).

# Performance Grading

## Grading Scale:

If Evaluation Score is in between below this value mention Grades are Assign:

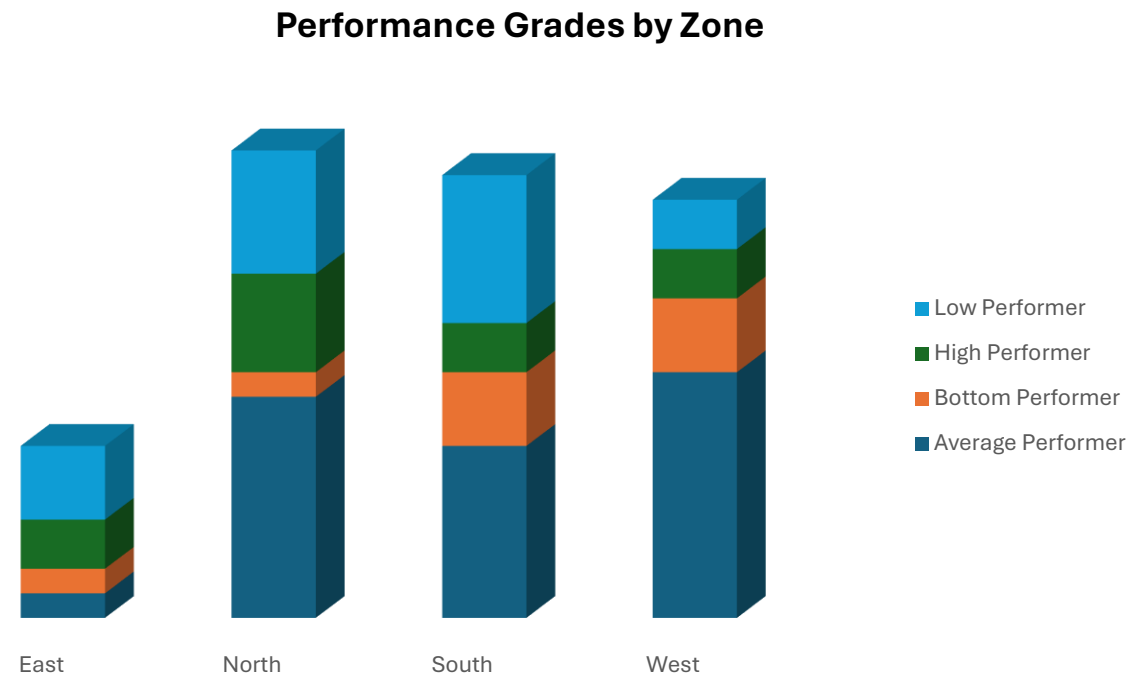
High Performer: 90–100

Average Performer: 70–89

Low Performer: 50–69

Bottom Performer: <50

**Example:** Count of Each  
Grade by Zone



Example Fig.

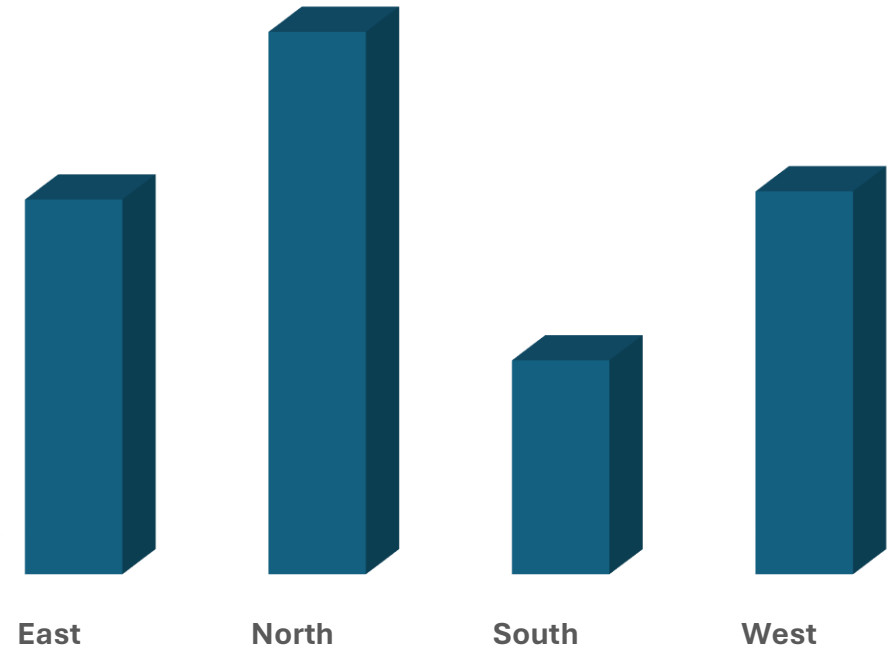
# Pivot Table Analysis

## 1. Zone Analysis by Score

- **North** has **Highest** Average Evaluation Score – **76%**
- **South** has **Lowest** Average Evaluation Score – **66%**

**Performance** variation suggests **different quality across regions**

Average Score of Evaluation score by each Zone

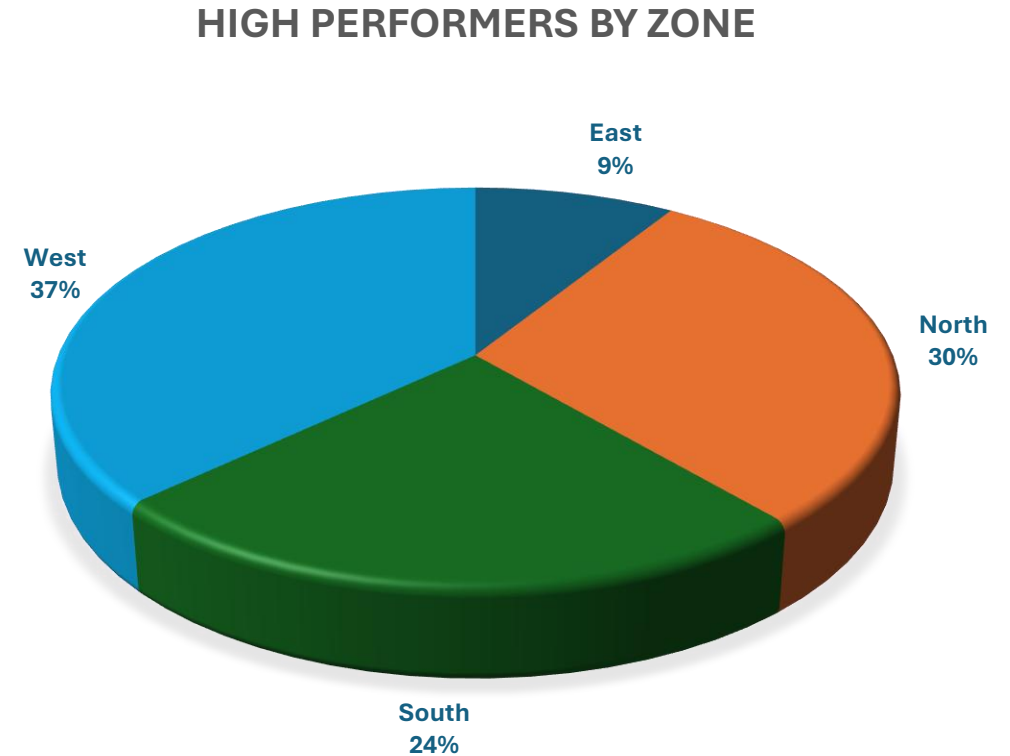


# Pivot Table Analysis

## 2. High Performer Analysis

- **West** has **Highest** % of High Performers – **37%**
- **East** has **Lowest** % of High Performers – only **9%**

Indicates certain **zones** consistently deliver **better customer service** except East

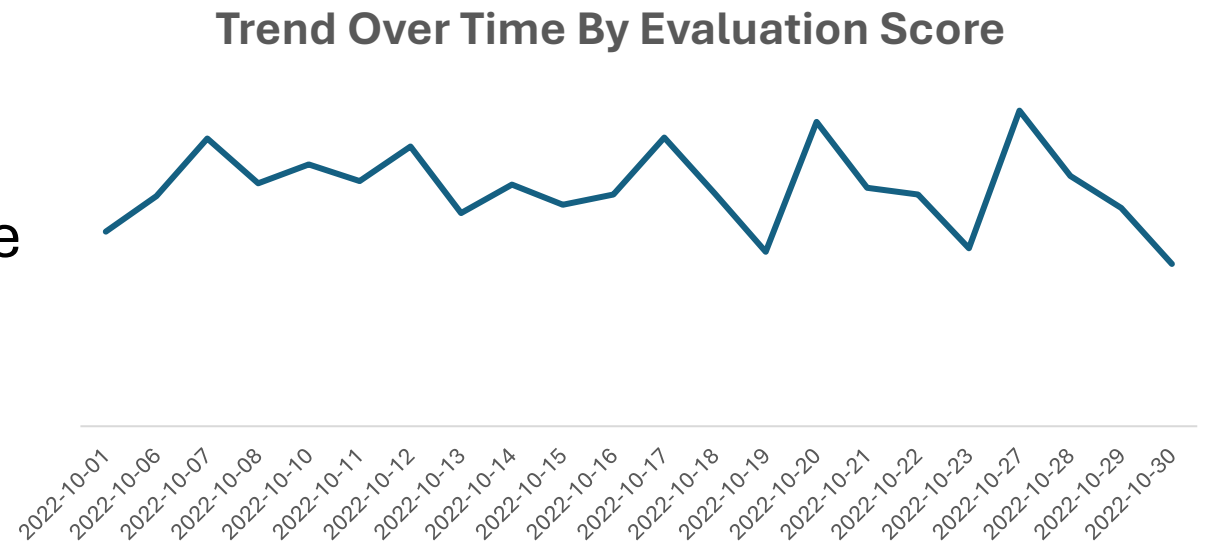


# Pivot Table Analysis

## 3. Trend Over Time

- Daily trend (October 2022) shows **fluctuations**.
- Toward **Oct 27–29**, performance **drops** again.

**Score is drop** very fast needs improvement in styling.



# Pivot Table Analysis

## 4. Heatmap: Criteria Scores by Zone

Zone	Average of STORE	Average of FIRST	Average of	Average of	Average of TRIAL	Average of	Average of
	AMBIANCE	IMPRESSIONS	DISCOVERY	RECOMMENDATI ONS	EXPERIENCE & UPSELL	OBJECTION HANDLING	CLOSURE & CARE
East	90.57142857	81.71428571	45.71428571	71.28571429	68	80.85714286	55
North	93.05263158	82.31578947	80	63.15789474	75.21052632	66.68421053	63.78947368
South	86.55555556	81	62.22222222	53.66666667	51.61111111	81.5	49.11111111
West	85.76470588	84.94117647	68.23529412	58.82352941	67.82352941	80.47058824	52

- **Ambiance** and **First Impressions** is **strong** in **all** regions.
- **Recommendations** and **Closure & Care** is **weak** in **all** regions.
- In **East**, **Discovery** is most **weak** among **all** criteria and zone.

**Highlights** where **Trail Experience & Upsell** should be **targeted** and also **Discovery**.



# Pivot Table Analysis

## 3. Performance Grade Distribution

- **North Zone**, indicating the **strongest** overall performance.
- **South and West Zones** show a **balanced mix**.
- **East Zone** suggesting fewer individuals or **lower** overall **performance**.

Prioritize **performance improvement** initiatives in the **East** zone, where **low** and **bottom** performers dominate the **distribution**.

