

Financial Sales Variance Dashboard



PROJECT OVERVIEW

This project analyzes and visualizes sales performance data using Power BI. The goal is to compare actual sales against targets, identify monthly variance, and evaluate individual salesperson performance. The dashboard helps stakeholders quickly spot underperformance, recognize top performers, and make data-driven decisions to improve sales results.

\$19M

Total Sales Actual

\$19M

Total Sales Target

(\$367K)

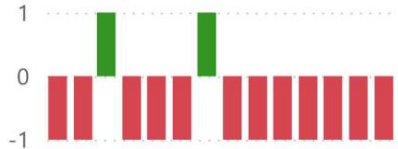
Variance

1.9%

Variance Pct Label

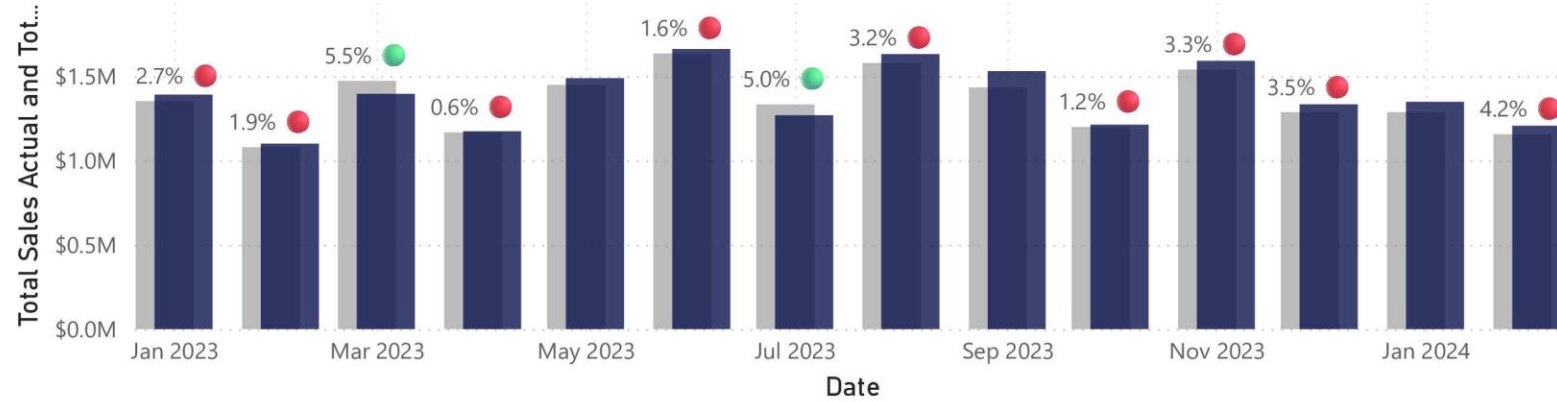
2

Months Target Reached



We met targets for 2out of14

● Total Sales Actual ● Total Sales Target



Picture	Sales person	Total Sales Actual	Total Sales Target	Variance%	Total Sales Actual by Date
	Dennison Crosswaite	\$786K	\$776K	1.3%	
	Oby Sorrel	\$786K	\$763K	3.0%	
	Brien Boise	\$791K	\$848K	-6.7%	
	Mallorie Waber	\$783K	\$836K	-6.3%	
	Curtice Advani	\$750K	\$708K	5.9%	
	Wilone O'Kielt	\$744K	\$777K	-4.2%	
	Barr Faughny	\$808K	\$787K	2.7%	
	Van Tuxwell	\$801K	\$858K	-6.7%	
	Gunar Cockshoot	\$846K	\$873K	-3.0%	
	Roddy Speechley	\$732K	\$716K	2.2%	
	Beverie Moffet	\$760K	\$740K	2.7%	
	Ches Bonnell	\$761K	\$803K	-5.3%	

Team

Delish

Jucies

Tempo

Yummies

Dashboard Features

- ❑ Total sales vs. target KPIs.
- ❑ Monthly variance trends with color-coded indicators.
- ❑ Salesperson performance table with variance %.
- ❑ Interactive filters for team or time period analysis.
- ❑ Drill-down capability for detailed monthly and individual analysis.
- ❑ Clean, user-friendly design for easy interpretation by stakeholders

ANALYSIS & INSIGHTS

Overall Performance

- Total Sales achieved: **\$19M**
- Target: **\$19M**
- Variance: **(\$367K)** → shortfall of 1.9% overall.
- Only **2 out of 14** months hit the target → Consistently missing monthly goals.

Monthly Trends

- Most months show negative variance, with underperformance between ~0.6% and 6.7%.
- Only two months exceeded target (5.5%, 5.0% positive variances).
- Indicates a persistent gap in forecasting accuracy or sales execution.

Sales Team Performance

- Wide range of individual variance:
 - ❖ Best performers: Curtice Advani (+5.9%), Oby Sorrel (+3.0%), Barr Faughny (+2.7%), Beverie Moffet (+2.7%).
 - ❖ Underperformers: Brien Boise (-6.7%), Van Tuxwell (-6.7%), Ches Bonnell (-5.3%), Mallorie Waber (-6.3%).
- Highlights potential for rebalancing territories or coaching low performers.

Business Impact

- ❑ Helps managers identify months with consistent sales underperformance for better planning.
- ❑ Highlights differences in individual salesperson results to support targeted coaching.
- ❑ Improves accuracy in forecasting and target-setting by showing actual vs. target variance.
- ❑ Guides better territory allocation and workload distribution based on performance data.
- ❑ Supports development of fair and effective incentive programs.
- ❑ Delivers clear, interactive insights to enable faster, data-based decision-making.

Conclusion

This project involved creating an interactive Power BI dashboard to evaluate sales performance against targets. The analysis revealed that targets were achieved in only 2 out of 14 months, with consistent shortfalls and significant differences among individual sales team members. These insights support more accurate forecasting, targeted coaching, and improved sales planning, demonstrating my ability to deliver clear, data-driven business reporting.