KPI Dashboard Creation

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Date : 08/22/2025

1. Objective of the Task

The goal of this project was to **design and implement a KPI Dashboard** for a business function — specifically, the **Sales Department** — using a dataset containing 1,000 transaction records.
The dashboard aims to:

- Track and visualize key performance indicators (KPIs) such as total sales, profit margin, and customer activity.
- Identify sales trends and business insights.
- Provide management with a summarized view of company performance.

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2. Dataset Overview

The dataset used is sales_data_1000_rows_fixed.xlsx, which contains **1,000 records** representing sales transactions over a period.

Columns and Description

Column	Description
Order ID	Unique identifier for each sales order
Date	Transaction date
Customer ID	Unique ID representing each customer
Region	Geographic region (North, South, East, West)
Product	Product type (Laptop, Phone, Tablet)
Quantity	Number of items sold
Sales ($)	Total sales amount in USD
Profit ($)	Profit made per transaction
Leads	Number of potential customer leads

Data Characteristics

- Total rows: 1,000
- No missing values detected
- Data type of Date converted to datetime for time-based analysis
- Average sales per order: **$1,688.61**
- Average profit per order: **$281.92**

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3. Tools and Libraries Used

Library	Purpose
Pandas	Data cleaning, aggregation, and KPI calculations
Matplotlib	Creating trend and distribution charts
Seaborn	Enhanced visualizations and data insights
Jupyter Notebook	Interactive environment for analysis and reporting

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4. Step-by-Step Implementation Summary

Step 1: Data Loading

The dataset was loaded using pandas.read_excel() and examined using df.head() and df.info() to confirm structure and data types.

Step 2: Data Cleaning

- Column names were standardized (spaces replaced with underscores).
- "Month" column was derived from "Date" for time-series visualization.

Step 3: Exploratory Data Analysis (EDA)

- Checked missing values and data distribution using df.describe().
- Verified that all fields contained valid entries.

Step 4: KPI Computation

Calculated 10 key performance metrics to summarize sales activity (explained in section 5).

Step 5: Visualization

Created clear and interpretable charts:

- **Bar chart** for Region-wise Sales
- **Line chart** for Monthly Sales Trend
- **Bar chart** for Product-wise Sales Distribution

Step 6: KPI Dashboard Output

Printed dashboard summary using Python's formatted strings for clarity and presented KPI values in a pandas DataFrame.

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5. KPI Definitions and Calculations

KPI	Description	Formula
Total Sales	Total revenue generated	df['Sales_'].sum()
Total Orders	Number of unique transactions	df['Order_ID'].nunique()
Average Order Value (AOV)	Avg. value per order	df['Sales_'].mean()
Unique Customers	Distinct customer count	df['Customer_ID'].nunique()
Repeat Purchase Rate	% of customers with >1 order	(Repeat_Customers / Unique_Customers) * 100
Sales Growth (%)	Month-over-month change	((Last - First) / First) * 100
Conversion Rate (%)	Ratio of orders to leads	(len(df) / df['Leads'].sum()) * 100
Top Product	Product with highest total sales	idxmax()
Region-wise Sales	Breakdown by region	groupby('Region')['Sales_'].sum()
Profit Margin (%)	Net profitability	(df['Profit_'].sum() / df['Sales_'].sum()) * 100

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6. Visualization and Insights

1. Region-wise Sales

- North region leads with the **highest total sales** ($471,096).
- West region shows the **lowest performance** ($353,369).

2. Monthly Sales Trend

- Sales are moderately fluctuating across months.
- A small decline of approximately **19.7%** in the latest month compared to the first.

3. Product-wise Sales Distribution

- **Phones** are the top-selling product.
- **Laptops** and **Tablets** follow closely behind, indicating a balanced product portfolio.

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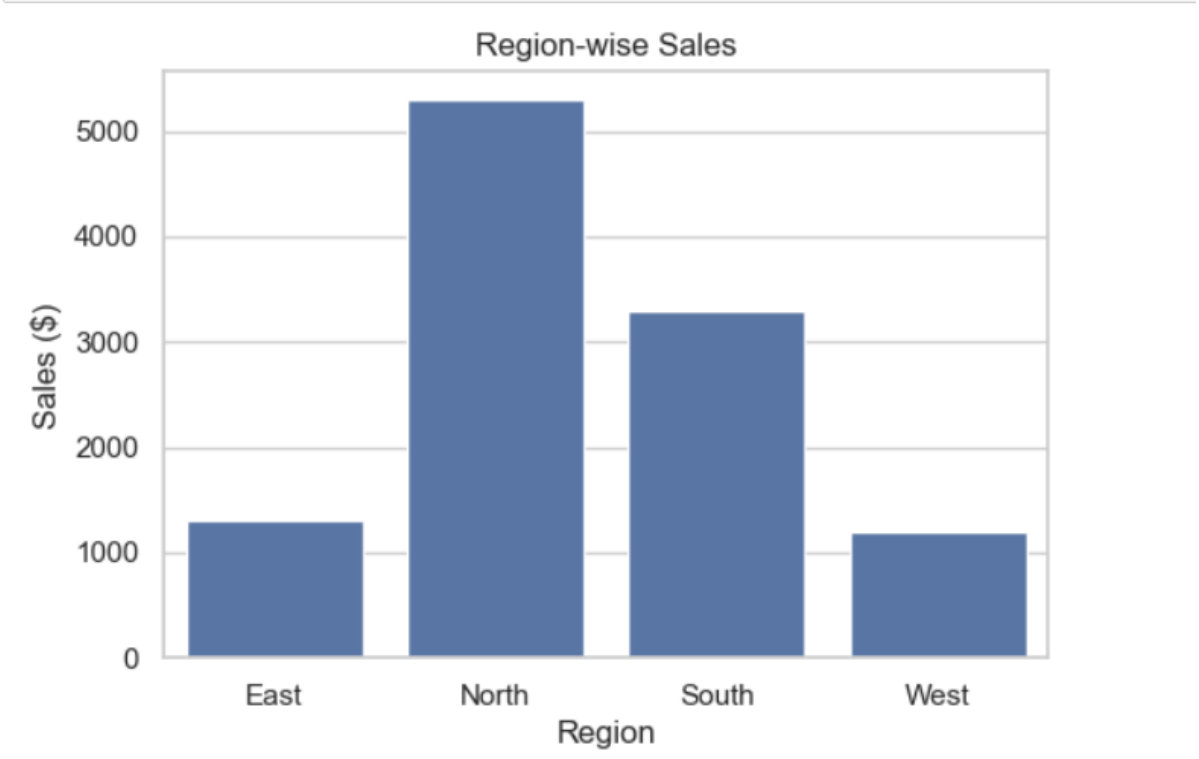
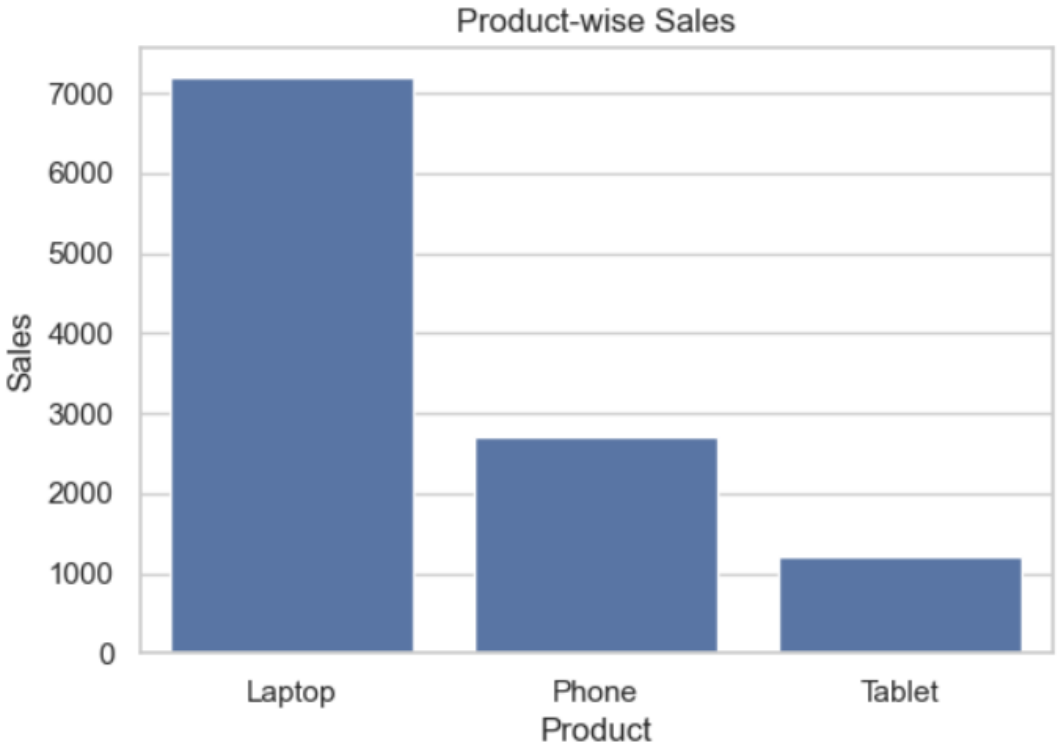
7. Final Dashboard Results

KPI	Result
Total Sales	$1,688,605
Total Orders	1,000
Average Order Value	$1,688.61
Unique Customers	50
Repeat Purchase Rate	100%
Sales Growth	-19.73%
Conversion Rate	11.56%
Top Product	Phone
Profit Margin	16.7%
Top Region	North





8. Business Implications and Recommendations

Key Findings

- Sales are strong overall, with North performing best geographically.
- A high repeat purchase rate (100%) suggests excellent customer loyalty or recurring business clients.
- A declining sales trend in later months may need investigation.
- Profit margin is healthy (16.7%) — could be optimized further via operational cost reduction.

Recommendations

1. **Boost Sales in West Region**
    - Focus marketing efforts or promotional discounts there.
2. **Maintain Customer Loyalty**
    - Introduce rewards or referral programs to encourage repeat customers.
3. **Diversify Product Focus**
    - Since Phones dominate, consider upselling higher-value items like Laptops.
4. **Monitor Growth Trends**
    - Investigate the cause of recent sales decline and adjust strategies.
5. **Data-Driven Strategy**
    - Use ongoing KPI tracking to make agile business decisions monthly.

Conclusion

This KPI Dashboard successfully consolidates large-scale sales data into a concise, visual, and quantitative report.
Through automated analysis in **Python (Pandas + Matplotlib + Seaborn)**, the business can easily monitor critical metrics like sales growth, profit, and customer engagement.

Deliverable Outcome:
A complete, interactive Jupyter Notebook that:

- Loads and processes the dataset,
- Calculates 10 meaningful KPIs,
- Generates visual insights, and
- Summarizes findings into actionable business strategies.