

Sales Insights Dashboard

🚀 Overview

The **Sales Insights Dashboard** is an interactive analytics dashboard designed to help businesses monitor sales performance, track revenue trends, and optimise sales strategies. Built with Power BI, it provides dynamic visualisations, real-time filtering, and actionable insights.

✨ Key Features

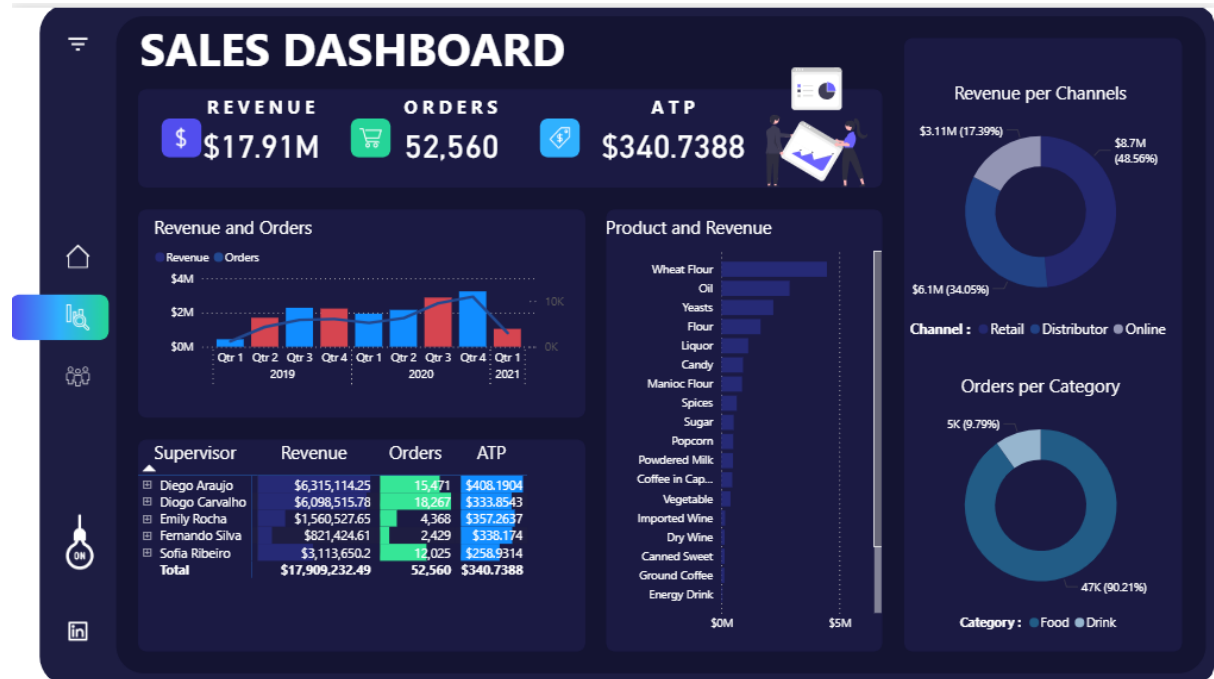
1. Home Screen

- **Welcome & Introduction:** Overview of the dashboard's purpose and navigation.
- **Easy Navigation:** Quick access to **Sales Dashboard** and **Performance Tracker**.



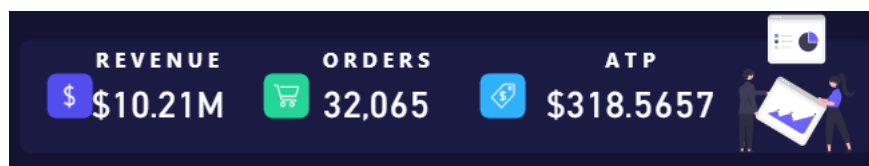
2. Sales Dashboard

Interactive Visualizations & Key Metrics:



3 Summary Cards:

- **Total Revenue**
- **Total Orders**
- **Average Transaction Profit**



5 Dynamic Charts:

- **i. Revenue & Orders Trend**
 - View trends by **Year, Quarter, or Month**.
 - Alerts when **budget exceeds revenue** (critical indicator).



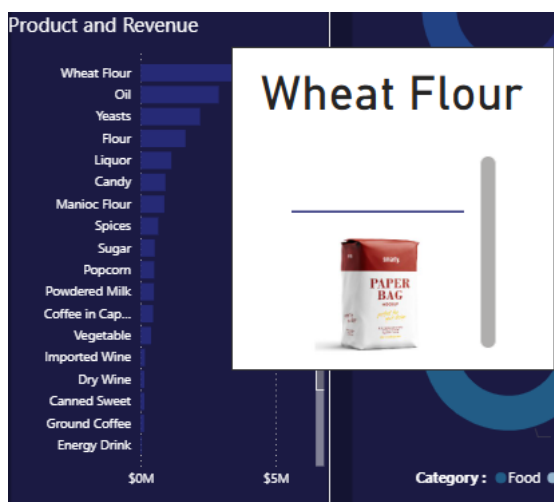
ii. Salesperson Performance

- Revenue & orders generated per salesperson.

Supervisor	Revenue	Orders	ATP
Diego Araujo	\$6,315,114.25	15,471	\$408.1904
Diogo Carvalho	\$6,098,515.78	18,267	\$333.8543
Emily Rocha	\$1,560,527.65	4,368	\$357.2637
Fernando Silva	\$821,424.61	2,429	\$338.174
Sofia Ribeiro	\$3,113,650.2	12,025	\$258.9314
Total	\$17,909,232.49	52,560	\$340.7388

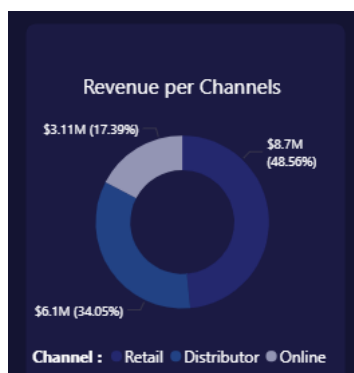
iii. Revenue on Product Type

- Revenue breakdown by product Type.



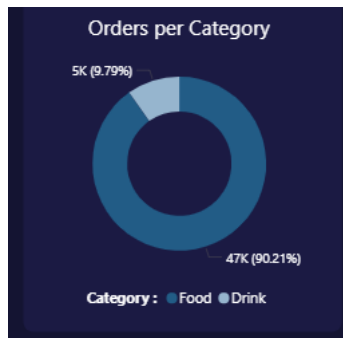
iv. Channel-wise Revenue

- Sales distribution across marketing/sales channels.



v. Product Category Weightage in Orders

- Categories drive the most orders.



◆ Filters:

- Slice data by **Year** and **Salesperson** for deeper analysis.

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✈

FILTERS

Year

2019	2020	2021
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Manager, Supervisor, Salesperson

- ^ Gabriel Azevedo
 - ^ Diogo Carvalho
 - Estevan Souza
 - Gustavo Gomes
 - Julio Lima
 - v Sofia Ribeiro
- ^ Victor Castro
 - v Diego Araujo
 - v Emily Rocha
 - v Fernando Silva

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3. Performance Tracker

🏆 Salesperson Ranking & Detailed Analytics:



- **Revenue-based ranking** of sales team members.
- **Per-product sales breakdown** for each salesperson.
- **% Revenue Contribution** of each salesperson.

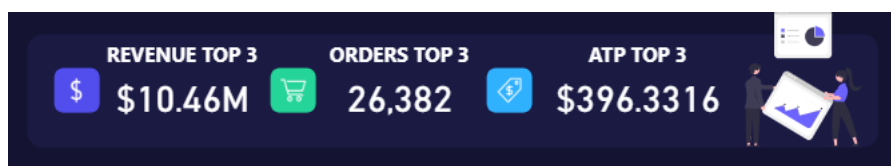
Ranking				
#	Photo	Salesperson Name	Revenue	% Revenue
4		Felipe Goncalves	\$1,676,337.1	9.36%
5		Leonardo Cardoso	\$1,607,711.7	8.98%
6		Isabella Sousa	\$870,301.84	4.86%
7		Kaua Araujo	\$821,424.61	4.59%
8		Mateus Costa	\$785,240.57	4.38%
9		Gustavo Barros	\$664,172.3	3.71%
10		Julia Silva	\$652,072.53	3.64%
11		Estevan Souza	\$349,897.22	1.95%
12		Julieta Gomes	\$26,053.51	0.15%

- **Standing Borad**



- **3 Summary Cards:**

- **Revenue top 3**
- **Total Orders top 3**
- **Average Transaction Profit top 3**



◆ **Filters:**

- Analyse performance by **Year** and **Product Category**.

FILTERS

Year

2019 2020 2021

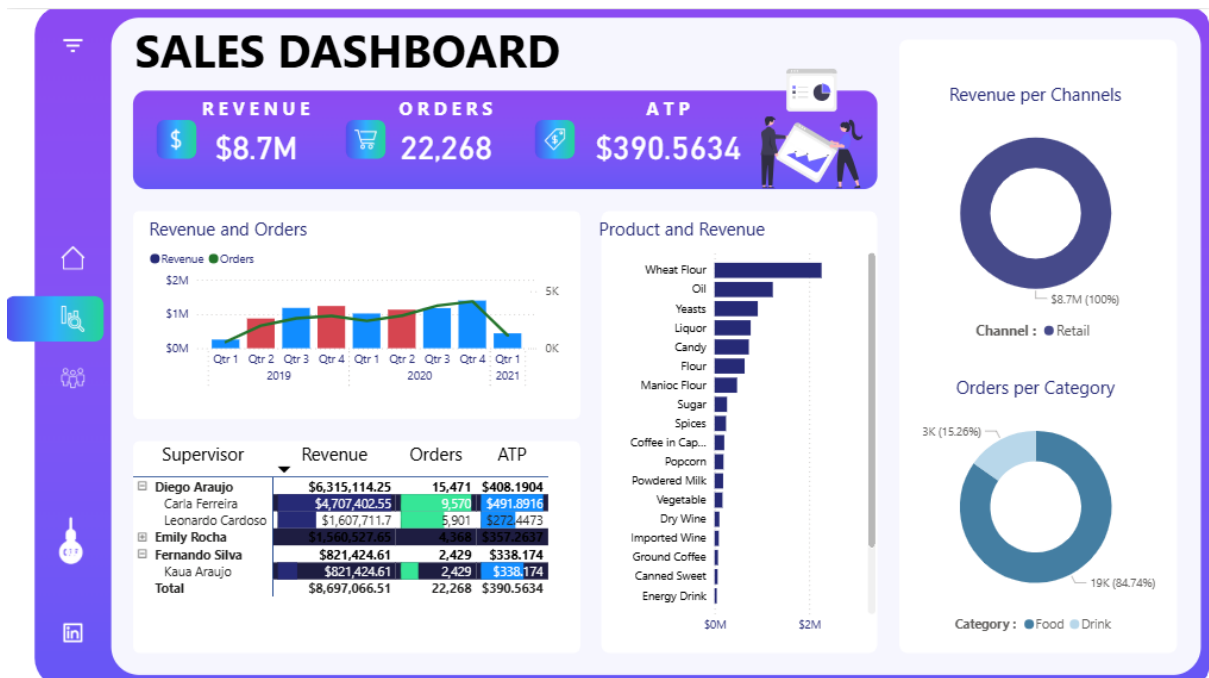
Product Group

- ☒ Candy
- ☐ Canned Sweet
- ☐ Cassava starch
- ☐ Coffee in Capsules
- ☐ Dry Wine
- ☐ Energy Drink
- ☐ Flour
- ☐ Ground Coffee
- ☐ Imported Wine
- ☐ Liquor
- ☐ Manioc Flour
- ☐ Oil
- ☐ Popcorn
- ☐ Powdered Milk
- ☐ Red Wine
- ☐ Spices

Button bar for navigation between different pages and dark to light mode



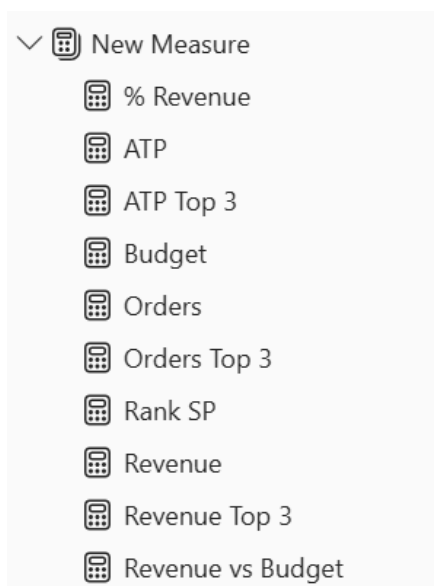
Dashboard in light mode



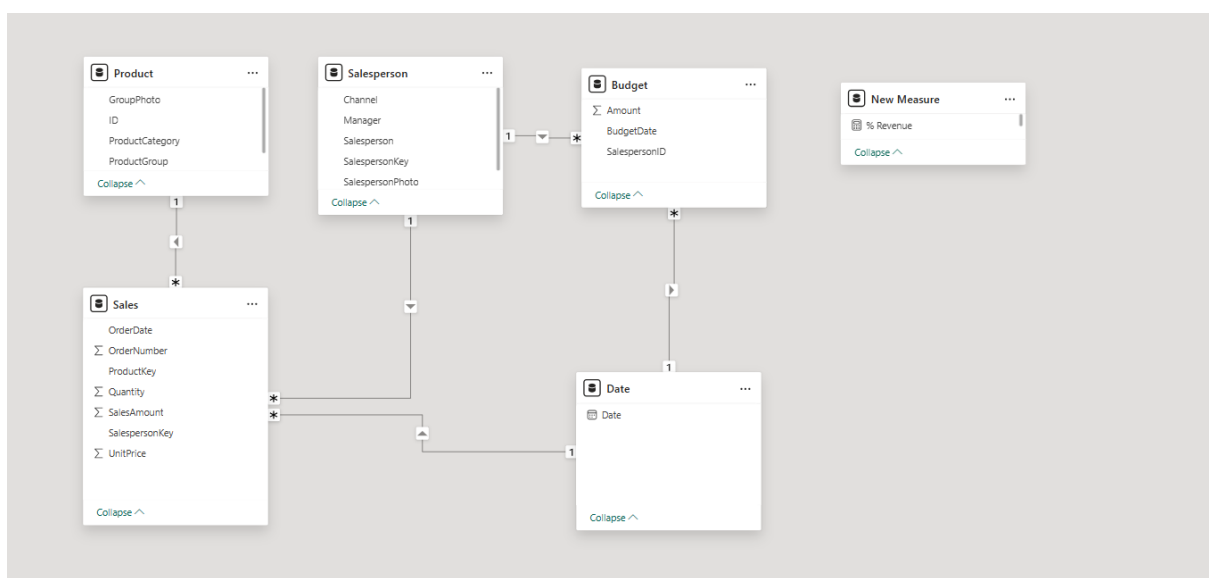
🔧 Technologies Used

- **Frontend:** Power BI / DAX / Power Query
- **Backend:** Python (Pandas, Request)
- **Data Source:** EXCEL

- **Measures Created using DAX**



Data Model



How to Use?

1. **Clone the repository** (if applicable):

bash

```
git clone https://github.com/your-repo/sales-insights-dashboard.git
```

2. **Open the dashboard file** .
3. **Interact with filters** to explore data.
4. **Export reports** (if supported).

Project Structure

```
sales-insights-dashboard/  
├── data/                # Raw  
├── docs/                # Documentation README file  
├── assets/              # Images/icons  
├── dashboard/           # Main dashboard files  
└── README.md
```

Contact

For questions or feedback, reach out at:

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 LinkedIn <https://www.linkedin.com/in/syed-waqas-imam-5a0541b1/>

Key Benefits

- ✓ **Data-Driven Decisions** – Identify top performers & underperforming products.
 - ✓ **Real-Time Tracking** – Monitor sales trends monthly/quarterly.
 - ✓ **Interactive Exploration** – Custom filters for targeted insights.
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🔍 **Ready to explore? Open the dashboard and start analysing!**

Sales Insights Dashboard – Business Impact & Strategic Recommendations

1. Revenue & Budget Optimisation

Key Questions Answered:

- Where is revenue exceeding or falling short of budget targets?
- Which months/quarters have consistent revenue gaps?

Business Impact:

- **Proactive Budget Adjustments:** Identify underperforming periods and reallocate resources (e.g., increase marketing spend in low-revenue months).
- **Cost Control:** Flag overspending early (e.g., if sales incentives outweigh revenue gains).
- **Forecasting Accuracy:** Compare historical trends to improve future budget planning.

Refined Insight:

The dashboard highlights months where revenue falls below budget (e.g., Q3 2023). This suggests seasonal dips—businesses can run targeted promotions in these periods.

2. Sales Team Performance & Incentives

Key Questions Answered:

- Who are the top/underperforming salespeople?
- Which products are struggling to sell, and who is responsible?

Business Impact:

- **Performance-Based Incentives:** Reward top performers (e.g., bonuses for top 10% of sales staff).
- **Targeted Training:** Coach low performers on specific product categories (e.g., Salesperson X struggles with Product Group B).
- **Workload Balancing:** Reassign accounts/products to align with strengths.

Refined Insight:

The Performance Tracker reveals that 70% of revenue comes from just 3 salespeople. Cross-training others on their tactics could boost overall revenue by 15-20%.

3. Product & Category Strategy

Key Questions Answered:

- Which product groups contribute most to revenue vs. orders?
- Are high-revenue products also high-margin?

Business Impact:

- **Inventory Management:** Stock more of high-revenue products (e.g., Product Group A drives 40% of revenue).
- **Pricing Adjustments:** Raise prices on low-margin, high-volume items.
- **Discontinue Underperformers:** Phase out products with declining sales (e.g., Product Group D contributes <5% revenue).

Refined Insight:

Product Group C generates 30% of orders but only 10% of revenue—suggesting it's a low-value, high-volume category. Bundle it with high-margin products to increase profitability.

4. Channel Effectiveness

Key Questions Answered:

- Which channels (online, retail, wholesale) drive the most revenue?
- Is there channel overlap or cannibalization?

Business Impact:

- **Channel Investment:** Allocate more budget to high-growth channels (e.g., online sales grew 25% YoY).
- **Omnichannel Synergy:** Identify if retail customers also shop online (e.g., offer in-store pickup discounts).

Refined Insight:

The 'Channel Breakdown' chart shows online sales outperform retail by 3x—suggesting a need to reduce physical storefronts and invest in e-commerce UX.

5. Time-Based Decision Making

Key Questions Answered:

- How do sales trends compare YoY/QoQ?
- Are there seasonal peaks (e.g., holidays) we can capitalise on?

Business Impact:

- **Campaign Timing:** Launch promotions before predictable dips (e.g., post-holiday slumps).
- **Staffing Adjustments:** Hire temporary staff during peak order periods.

Refined Insight:

December revenue spikes by 50% annually; planning inventory and staffing ahead of time can maximise this opportunity.

Strategic Recommendations

1. **Automate Alerts:** Set up dashboard alerts for budget deviations or salesperson performance drops.
 2. **Combine with CRM Data:** Integrate customer demographics to refine targeting (e.g., high-value client preferences).
 3. **A/B Test Strategies:** Use dashboard insights to test pricing/channel changes and measure impact.
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Final Note

This dashboard isn't just a reporting tool—it's a decision engine. By linking your findings to concrete actions (like reallocating budgets or training staff), businesses can turn data into a 10-20% revenue boost within a quarter.