Sales Performance Dashboard for Office Supplies Company (Excel Project)

Objective Summary:

This project involves a structured analysis of sales data to derive key business insights using Microsoft Excel. The dataset includes details such as product sales, customer transactions, revenue, profit, and order information.

The primary goal is to answer critical business questions related to product performance, customer behavior, regional trends, and profitability. Pivot tables, calculated fields, and charts were used to explore patterns and relationships within the data.

The outcome is a clean, insight-driven report supported by a dynamic dashboard that summarizes the findings in a clear and actionable format, enabling data-driven decision-making.

Data and Tools Used:

- Excel (Pivot tables - Pivot charts - Slicers - Formulas)
- Dataset : http://127.0.0.1:5500/Sales Analysis.xlsx

Project Questions:

1. What is our total revenue, profit, and quantity sold over time?
   - Total Net Revenue: $9,894,183.94
   - Total Profit: $286,397.02
   - Total Quantity Sold: 37873 units.

2. Which Months had the highest sales?
   - The top 3 months with highest sales were December with a net revenue of $1,538,620 - November with $1,495,512 - and September with $1,294,825.

3. **What are our Year-over-Year (YoY) trends in Quantity Sold, Net Revenue, and Profit?**

📊 Insight

- **2015**: Sales quantity increased slightly by **5.25%**, but **revenue dropped slightly (-0.44%)**, likely due to lower pricing or smaller orders. However, **profit jumped by 24.37%**, which may suggest improved margins or reduced costs.
- **2016**: Significant growth across the board: quantity **+23.29%**, revenue **+30.18%**, and profit **+32.74%** — a very strong year.
- **2017**: Continued growth, though slightly less than the previous year. Quantity rose **+26.83%**, revenue **+15.26%**, and profit **+14.24%** — indicating healthy but stabilizing performance.

4. Which product categories and sub-categories generate the most revenue?

✅ Summary of Key Findings

🥇 Top-Level Categories by Revenue:

1. **Technology** – **$3,491,750**

2. **Furniture** – **$3,229,365**
3. **Office Supplies** – **$3,173,069**

📊 Insight

- **Technology** is the top category, largely driven by high-ticket items like **Phones**, **Machines**, and **Copiers**.
- **Furniture** is a close second, with **Chairs** and **Tables** being the dominant sub-categories.
- **Office Supplies** is highly diversified, but **Storage** and **Binders** bring in the bulk of revenue.

5. Are there products with high sales but low profit margins (or vice versa)?

🚩 Sub-Categories with
High Revenue but Low Profit Margins: (Tables - Blinders- Appliances - Bookcases - Machines)
🔍
Insight: These sub-categories sell a lot but are either barely profitable or losing money. This indicates **possible pricing, discounting, or cost issues**.

🟢 Sub-Categories with
Low Revenue but High Profit Margins: (Paper - Accessories - Art - Labels - Fasteners).
🔍
Insight: These sub-categories are **very profitable relative to their sales volume**. Scaling these or bundling with high-volume items could improve profitability.

📈 Recommendation

- **Investigate high-sales but unprofitable products** like Tables, Binders, and Appliances. Check for:
  - Excessive discounts
  - High shipping or production costs
  - Inefficient pricing strategy
- **Promote and scale high-margin items** like Paper, Accessories, and Art.
- Consider **bundling low-margin popular products with high-margin accessories** to improve overall profitability.

6. Are there any products consistently underperforming?

🟥 Consistently Underperforming Products

1. Supplies

- ❌ Negative profit
- ⚠️ Small sales volume and revenue
- 📉 Not financially sustainable

2. Bookcases, Tables, Machines

- ❌ Negative or almost zero profit
- 🟡 Decent revenue, but **not profitable**
- 📉 Unhealthy cost-to-revenue ratio

3. Binders

- ⚠️ Very high volume
- ❌ Profit margin is **extremely negative**
- 🧮 Suggests major pricing or cost issue

7. Which regions/states are performing best in terms of sales and profit?

🏆 Top Performing Region

- ✅ **West Region**
  - Highest **net revenue** and **profit**
  - Strongest **profit margin (3.45%)**

📊 Second Best

- ✅ **East Region**
  - Second highest in both **revenue** and **profit**
  - Stable profit margin (3.14%)

📝 Conclusion

> The West and East regions are the best-performing in terms of both revenue and profit. These regions may benefit from expanded sales and marketing efforts. The Central region, despite decent sales, yields the lowest profit margin, suggesting higher costs or inefficient operations that need review.

8. Which customer segments bring the most value?

🥇 Top Value Segment

- ✅ **Consumer Segment**
  - **Highest net revenue** ($5M)
  - **Largest number of orders** (19.5K)
  - **Top contributor** to overall business volume

📊 Most Efficient Segment

- ✅ **Home Office**
  - **Highest profit margin (3.31%)**
  - Although smaller in volume, it's **most efficient per dollar earned**

📝 Conclusion

> While the Consumer segment brings in the most revenue and order volume, the Home Office segment delivers the best profit efficiency. All three segments contribute significantly, but tailored strategies for each can further enhance their value.

9. How do sales differ across customer segments and regions?

	Column Labels						
	Sum of Net Revenue			Sum of Profit			Total Sum of Net Revenue
Region	Consumer	Corporate	Home Office	Consumer	Corporate	Home Office	
West	$1,578,266	$954,090	$609,678	$57,451	$34,437	$16,530	$3,142,034
East	$1,457,252	$899,865	$558,559	$41,191	$23,623	$26,709	$2,915,675
South	$883,757	$553,608	$299,422	$26,914	$15,215	$4,621	$1,736,787

| Central | $1,079,817 | $665,121 | $354,750 | $8,564 | $18,704 | $12,438 | $2,099,688 |
| Grand Total | $4,999,092 | $3,072,684 | $1,822,408 | $134,119 | $91,979 | $60,299 | $9,894,184 |

1. **Highest Performing Region Overall**:

   - **West** leads in both **total net revenue** ($3.14M) and **total profit** ($108.4K).

   - Strong performance across all customer segments, especially **Consumers**.

2. **Customer Segment Performance by Region**:

   - **Consumers** consistently generate the most revenue across all regions:

     - West: $1.58M

     - East: $1.46M

     - South: $883.8K

     - Central: $1.08M

   - **Corporate** follows second, with West ($954K) and East ($900K) being strong contributors.

   - **Home Office** contributes the least in all regions.

3. **Profit Breakdown**:

   - West also tops profit per segment:

     - **Consumer Profit**: $57.5K

     - **Corporate Profit**: $34.4K

     - **Home Office Profit**: $16.5K

   - Lowest profit comes from Central region's **Consumer** segment ($8.6K), despite decent revenue.

4. **Insights**:

   - **Focus Market**: West region—especially Consumer and Corporate segments.

   - **Underperformers**: South and Central regions, particularly **Home Office** segment.

   - **Strategy**: Consider marketing campaigns targeting Home Office customers in the East and West, where they already show higher profitability.

Conclusion

This analysis provided actionable insights into product profitability, customer value, and regional performance. The final dashboard enables decision-makers to monitor key metrics and drive more targeted strategies. Future extensions may include deeper customer behavior analysis or time-based forecasting.