Project Report: Financial KPI Dashboard in Power BI

Introduction

The project focuses on creating a dynamic business performance dashboard using Power BI. It visualizes key performance indicators (KPIs) such as Sales, Gross Sales, Cost of Goods Sold (COGS), Profit, and Year-over-Year (YoY) growth. The purpose is to help decision-makers monitor financial performance and trends effectively.

Abstract

Using historical financial data from an Excel dataset, we built interactive visuals to understand revenue, cost, and profitability over time. The dashboard includes filtering options for dimensions like Country, Product, and Segment, as well as comparison visuals for 2013 and 2014 sales. Additionally, we calculated the LTV:CAC ratio to evaluate the efficiency of customer acquisition.

Tools Used

- Power BI (for data modeling and visualization)

- DAX (Data Analysis Expressions for calculations)

- Microsoft Excel (data source)

- FPDF (for PDF report generation)

Steps Involved in Building the Project

1. Loaded and cleaned the financial dataset in Power BI.

2. Created calculated columns and measures for KPIs such as Total Sales, Profit, and Gross Margin.

3. Designed visuals: KPI cards, line chart (YoY Sales), bar chart (Sales by Country), and table (Segment-wise breakdown).

4. Introduced LTV:CAC metric by simulating marketing spend and customer acquisition using a DAX-calculated table.

5. Built slicers for filtering across dimensions (Country, Discount Band, Product, Segment).

6. Applied themes and formatting to ensure readability and clarity.

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Conclusion

The final dashboard offers a high-level overview of the company's financial performance. Key metrics are visualized clearly, enabling stakeholders to identify trends, compare year-over-year progress, and analyze profit drivers. The LTV:CAC ratio provides additional insight into customer profitability, making this a comprehensive financial analytics tool.