

## Coffee Chain Performance Dashboard – Sales, Targets & Marketing ROI (Power BI)

### Dataset Summary

Excel File Used: Coffee\_Chain\_Sales.xlsx(kaggle)

Data Coverage Includes:

- Sales Metrics: Sales, Profit, Margin, Target Sales, Target Profit, Target Margin
- Cost & Inventory: COGS, Total Expenses, Inventory
- Marketing: Marketing Spend
- Attributes: Product Line, Product Type, State, Market, Market Size, Date

### Power BI Dashboard Summary

#### Page 1 – Overview

**Purpose: High-level snapshot of business performance**

Visuals & Details:

- KPI Cards: Sales, Target Sales, Profit, Target Profit (To highlight key financial metrics)
- Pie Chart: Market vs Sales (Regional contribution to revenue)
- Bar Chart (Top States): State vs Sales (Identify top 5 performing states)
- Trend Line: Date vs Sales (Analyze sales trend over time)
- Table: Product vs Sales, Profit, Margin (Product-level financial insight)
- Slicers: Market, Product Line, State, Date

**Insight:** Central and West markets are top performers. Missouri and South regions underperform. Product-wise, Colombian and Mocha do well.

## Page 2 – Actual vs Target

### Purpose: Compare actual performance vs target goals

#### Visuals & Details:

- Clustered Bar Chart: Market vs Target Profit & Actual Profit (Visualize achievement of profit targets)
- Clustered Column Chart: Market vs Target Sales & Actual Sales (Compare sales vs goals region-wise)
- Line + Column Chart: Market vs Margin & Target Margin (Compare actual margin vs targets)
- Table: State vs Profit, Target, Variance (Spot underperforming states)
- Slicers: Market, Date

**Insight:** Some states are falling short of target profits. Difference Between Actual and Target Profit highlights the gap.

## Page 3 – Product Performance

### Purpose: Evaluate products & categories

#### Visuals & Details:

- Line Chart: Date vs Sales by Product Line (Show sales trend of Beans vs Leaves)
- Donut Chart: Product Type vs Sales (Sales contribution by product type)
- Line & Column Chart: Product Line vs Sales, Profit (Compare sales and profit together)
- Clustered Bar Chart: Product Type vs Sales, Profit, Margin (Breakdown by product category)
- Slicers: Market, State, Date

**Insight:** Beans perform better than Leaves. Certain product types consistently drive revenue and profit.

## Page 4 – Cost & Inventory

### Purpose: Analyze expenses & inventory levels

#### Visuals & Details:

- Stacked Bar Chart: Product vs COGS + Total Expenses (See most expensive products)
- Clustered Column Chart: Market vs Sales, Profit, COGS, Expense (Analyze total cost vs output)
- Line Chart: Date vs Inventory by Market (Track stock movement across markets)
- Slicers: State, Market Size, Type

**Insight:** Products like Lemon and Colombian have higher costs. Inventory levels vary across markets.

## Page 5 – Marketing ROI

**Purpose: Evaluate ROI from marketing efforts**

Visuals & Details:

- Scatter Chart: Marketing vs Profit (by Market) (See marketing impact by region)
- Bar + Line Chart: State vs Marketing & Sales (Sales contribution from marketing)
- Bar + Line Chart: Product vs Sales, Profit, Marketing (Performance of individual products)
- Pie Chart: Product vs Marketing Spend (Budget distribution)
- Slicers: Market, Product Line, State, Date

**Insight:** Some products and states get high marketing budgets but low returns. Marketing is useful only in selected states/markets.

## Final Deliverables & Insights

- ✓ Strong visuals for Executive Summary and Drilldowns
- ✓ Dynamic slicers for user interaction
- ✓ Clear comparison of actuals vs targets
- ✓ ROI evaluation of marketing efforts
- ✓ Insight into inventory trends & cost optimization
- ✓ Product-level profit and sales trend monitoring

## Power BI Dashboard Summary : Q&A – Understanding the Dashboard Insights

### Page 1 – Overview

#### 1. What are the key KPIs displayed in the Overview page, and why are they important?

We show total Sales, Profit, and their targets. These tell us how much money the business is making and if it's meeting its goals.

#### 2. How does sales performance vary across different markets and states?

Sales are strong in Central and West markets, while the South is underperforming. Some states like Iowa and California are doing great, others like Missouri are not.

#### 3. What does the sales trend over time suggest?

Sales go up and down during the year. This helps understand which months are good for business.

#### 4. Which products have the highest profit margin?

Colombian and Coffee Mocha products show high profit margins. They are good for business.

#### Page 2 – Actual vs Target

##### **5. How well did the business meet its target sales and profits?**

In most markets, actual profits are a bit less than the targets. Central and West did better than others.

##### **6. What does 'DifferenceBetweenActualandTargetProfit' mean?**

It shows if we earned more or less than expected. Positive = good, Negative = loss.

##### **7. Which markets or states missed their profit goals?**

Missouri and Massachusetts had losses. They need improvement.

#### Page 3 – Product Performance

##### **8. Which product line is better, Beans or Leaves?**

Beans sell more and make more profit than Leaves.

##### **9. What product types make the most money?**

Coffee & Espresso types are top sellers.

##### **10. What does the Sales vs Profit chart tell us?**

It shows that not all high sales mean high profit. Some products sell a lot but earn less.

#### Page 4 – Cost & Inventory

##### **11. Which products have high expenses?**

Colombian and Lemon products have high cost of goods and expenses.

##### **12. What does the inventory trend show?**

Inventory is steady but varies by market. We need to balance supply with sales.

##### **13. How do costs affect profit in different markets?**

If cost is too high in a market, profit drops. We must watch both together.

#### Page 5 – Marketing ROI

##### **14. Does more marketing mean more profit?**

In some places, yes. But not always. Smart marketing works better than just spending more.

**15. How is marketing different by state?**

Some states use marketing better. In others, we spend but don't see enough return.

**16. What visuals helped analyze ROI?**

The scatter chart and combo bar-line charts clearly showed the impact of marketing on profit.

**General / Final Insight Questions**

**17. Where should the company invest more?**

In Central and West markets — they perform well and respond to marketing.

**18. What actions can improve business?**

Cut costs in low-profit areas, invest in good-performing states, and use targeted marketing.

**19. How do slicers help?**

Slicers let us filter data easily — by state, product line, or date — for faster analysis.

**20. How did you design for clarity?**

I used clean visuals, added slicers, and grouped related metrics on each page to tell a clear story.