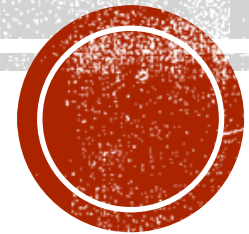


YOGESH'S DATA VISUALIZATION PROJECT

KPI DASHBOARD FOR TEA SALES

A Case Study on Tea sales

Duration: 5-10minutes



PROBLEM STATEMENT / PROJECT SCOPE

- Our client wants to develop a KPI Dashboard for the sales of tea from 2019 to 2022
- **KPIs:**
 1. Top selling teas over time
 2. Top and bottom tea packages sold by quantity
 3. Which country is the top buyer of the tea
 4. Who are top five customer



SOLUTION APPROACH

- There is one table provided which has Thousand rows and 9 columns in it
- Microsoft Excel was the tool used for creating the visualization/dashboard
- The data was imported, analysed and transformed as per necessity
- Pivot table was used to create different KPIs for the problem statement

- **KEY SKILLS**

- 1. Pivot Table**
- 2. Pivot charts**
- 3. Slicers**
- 4. Formulae**
- 5. Calculations**



DATA CLEANING/TRANSFORMATION

Order Date	Customer ID	Product ID	Quantity	Customer Name	Email	Country	Tea Type	Roast Type	Size	Unit Price	Sales	Loyalty Card
05-Sep-2019	17670-51384-MA	R-M-1	2	Aloisia Allner	aallner0@lulu.com	Japan	Cannabis tea	Orange	1.0 kg	\$ 9.95	\$ 19.90	Yes
05-Sep-2019	17670-51384-MA	E-M-0.5	5	Aloisia Allner	aallner0@lulu.com	Japan	Kamairicha	Orange	0.5 kg	\$ 8.25	\$ 41.25	Yes
17-Jun-2021	21125-22134-PX	A-L-1	1	Jami Redholes	jredholes2@tmall.com	Japan	Hojicha	Green	1.0 kg	\$ 12.95	\$ 12.95	Yes
15-Jul-2021	23806-46781-OU	E-M-1	2	Christoffer O' Shea		Korea	Kamairicha	Orange	1.0 kg	\$ 13.75	\$ 27.50	No
15-Jul-2021	23806-46781-OU	R-L-2.5	2	Christoffer O' Shea		Korea	Cannabis tea	Green	2.5 kg	\$ 27.49	\$ 54.97	No
04-Aug-2021	86561-91660-RB	L-D-1	3	Beryle Cottier		Japan	Oolong tea	Brown	1.0 kg	\$ 12.95	\$ 38.85	No
21-Jan-2022	65223-29612-CB	E-D-0.5	3	Shaylynn Lobe	slobe6@nifty.com	Japan	Kamairicha	Brown	0.5 kg	\$ 7.29	\$ 21.87	Yes
20-May-2022	21134-81676-FR	L-L-0.2	1	Melvin Wharfe		Korea	Oolong tea	Green	0.2 kg	\$ 4.76	\$ 4.76	Yes
02-Jan-2019	03396-68805-ZC	R-M-0.5	3	Guthrey Petracci	gpetracci8@livejournal.com	Japan	Cannabis tea	Orange	0.5 kg	\$ 5.97	\$ 17.91	No
05-Sep-2019	61021-27840-ZN	R-M-0.5	1	Rodger Raven	rraven9@ed.gov	Japan	Cannabis tea	Orange	0.5 kg	\$ 5.97	\$ 5.97	No
08-Mar-2021	76239-90137-UQ	A-D-1	4	Ferrell Ferber	fferbera@businesswire.com	Japan	Hojicha	Brown	1.0 kg	\$ 9.95	\$ 39.80	No
28-Oct-2020	49315-21985-BB	E-L-2.5	5	Duky Phizackerly	dphizackerlyb@utexas.edu	Japan	Kamairicha	Green	2.5 kg	\$ 34.16	\$ 170.78	Yes
02-Jul-2022	34136-36674-OM	R-M-1	5	Rosaleen Scholar	rscholarc@nyu.edu	Japan	Cannabis tea	Orange	1.0 kg	\$ 9.95	\$ 49.75	No
22-May-2020	39396-12890-PE	R-D-2.5	2	Terence Vanyutin	tvanyutind@wix.com	Japan	Cannabis tea	Brown	2.5 kg	\$ 20.59	\$ 41.17	No
05-Apr-2022	95875-73336-RG	L-D-0.2	3	Patrice Trobe	ptrobee@wunderground.com	Japan	Oolong tea	Brown	0.2 kg	\$ 3.89	\$ 11.66	Yes
07-Jun-2022	25473-43727-BY	R-M-2.5	5	Llywellyn Oscroft	loscroftf@ebay.co.uk	Japan	Cannabis tea	Orange	2.5 kg	\$ 22.89	\$ 114.43	No
20-Mar-2019	99643-51048-IQ	A-M-0.2	6	Minni Alabaster	malabasterg@hexun.com	Japan	Hojicha	Orange	0.2 kg	\$ 3.38	\$ 20.25	No
19-Oct-2019	62173-15287-CU	A-L-1	6	Rhianon Broxup	rbroxuph@jimdo.com	Japan	Hojicha	Green	1.0 kg	\$ 12.95	\$ 77.70	No
13-Jun-2019	57611-05522-ST	R-D-2.5	4	Pall Redford	predfordi@ow.ly	Korea	Cannabis tea	Brown	2.5 kg	\$ 20.59	\$ 82.34	Yes
04-Dec-2020	76664-37050-DT	A-M-0.2	5	Aurea Corradino	acorradinoj@harvard.edu	Japan	Hojicha	Orange	0.2 kg	\$ 3.38	\$ 16.88	Yes
04-Dec-2020	76664-37050-DT	E-D-0.2	4	Aurea Corradino	acorradinoj@harvard.edu	Japan	Kamairicha	Brown	0.2 kg	\$ 3.65	\$ 14.58	Yes
04-Dec-2020	03090-88267-BQ	A-D-0.2	6	Avrit Davidowsky	adavidowskyl@netvibes.com	Japan	Hojicha	Brown	0.2 kg	\$ 2.99	\$ 17.91	No
22-Jan-2021	37651-47492-NC	R-M-2.5	4	Annabel Antuk	aantukm@kickstarter.com	Japan	Cannabis tea	Orange	2.5 kg	\$ 22.89	\$ 91.54	Yes
11-Feb-2022	95399-57205-HI	A-D-0.2	4	Iorgo Kleinert	ikleinertn@timesonline.co.uk	Japan	Hojicha	Brown	0.2 kg	\$ 2.99	\$ 11.94	Yes
15-Sep-2021	24010-66714-HW	A-M-1	1	Chrisy Blofeld	cblofeldo@amazon.co.uk	Japan	Hojicha	Orange	1.0 kg	\$ 11.25	\$ 11.25	No
24-Oct-2020	07591-92789-UA	E-M-0.2	3	Culley Farris		Japan	Kamairicha	Orange	0.2 kg	\$ 4.13	\$ 12.38	Yes
20-Feb-2019	49231-44455-IC	A-M-0.5	4	Selene Shales	sshalesq@umich.edu	Japan	Hojicha	Orange	0.5 kg	\$ 6.75	\$ 27.00	Yes
08-Oct-2019	50124-88608-EO	A-M-0.2	5	Vivie Danneil	vdanneilr@mtv.com	Korea	Hojicha	Orange	0.2 kg	\$ 3.38	\$ 16.88	No
02-Aug-2022	00888-74814-UZ	A-D-0.5	3	Theresita Newbury	tnewburys@usda.gov	Korea	Hojicha	Brown	0.5 kg	\$ 5.97	\$ 17.91	No
20-Feb-2019	14158-30713-OB	A-D-1	4	Mozelle Calcutt	mcalcuttt@baidu.com	Korea	Hojicha	Brown	1.0 kg	\$ 9.95	\$ 39.80	Yes
25-Sep-2021	51427-89175-QJ	L-M-0.2	5	Adrian Swaine		Japan	Oolong tea	Orange	0.2 kg	\$ 4.37	\$ 21.83	No



KPIS/SLICERS MADE USING PIVOT TABLE

total sales overtime

	Tea Type ▼			
Months (Order Date) ▼	Cannabis tea	Hojicha	Kamairicha	Oolong tea
Jan	111	187	198	118
Feb	72	90	41	119
Mar	37	225	190	245
Apr	22	65	181	429
May		54	7	
Jun	91		548	124
Jul	141	170	219	171
Aug	123	214	41	134
Sep	36	179	36	229
Oct	214	188	114	54
Nov	23	68		224
Dec	59	248	205	49
Jan	158		55	43
Feb	403	739	334	120
Mar	166	67	85	81
Apr	114	27	78	124
May	44	40	246	60
Jun		344	192	143
Jul	267	79	110	175
Aug	128	23	78	29
Sep	297	101	195	64
Oct	43	98	157	135
Nov	27	165		119
Dec	18	24	355	71
Jan	36	106	12	201
Feb	16	170	49	244
Mar	164	192	307	278
Apr	24	63	9	329
May	185	143	95	263
Jun	88	280	12	188
Jul	146	109	125	52

Total sales by country

Country ▼	Sum of Sales
Taiwan	\$1,912
Korea	\$3,130
Japan	\$19,174

Top five customers

Customer Name ▼	Sum of Sales
Derick Snow	\$251
Don Flintiff	\$278
Nealson Cuttler	\$282
Terri Farra	\$289
Allis Wilmore	\$317

Slicers used to filter the data

Size

0.2 kg

0.5 kg

1.0 kg

2.5 kg

Loyalty Card

No

Yes

Roast Type

Brown

Green

Orange

Order Date

All Periods

2019

2020

MARAPRMAYJUNJULAUASEPNOVDECJANFEBMARAPRMAYJUNJULAUASEPNOV



SOLUTION APPROACH

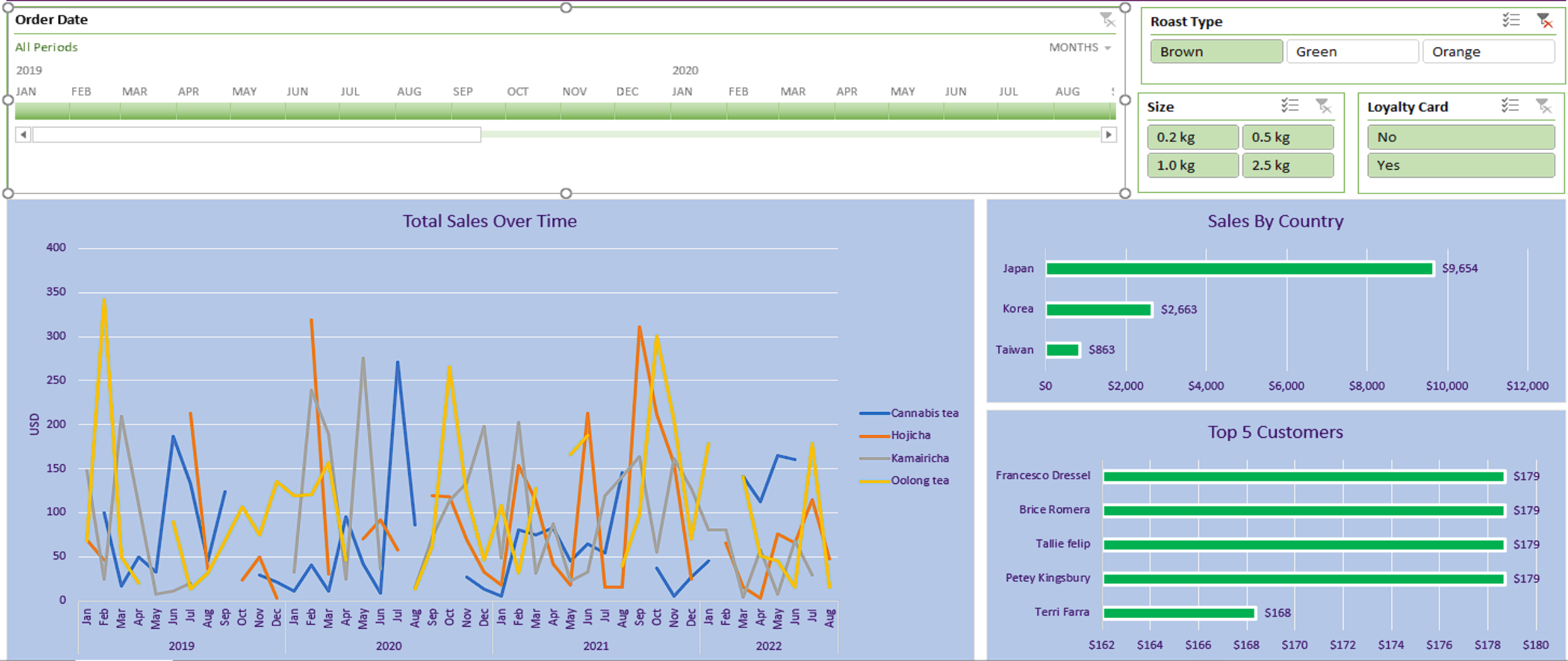
A few KPIs were created for the problem statement :

- Use the sales data and date data along with tea names to create out total sales over time dashboard.
- Use customers name and sales data them filter out this KPI using value filter for our top 5 customers.
- Them we create our slicers for the Size , roast type, loyalty cards by using slicer
- Create total sales by country by using country data and sales data



DASHBOARD

TEA SALES DASHBOARD



FEATURES OF THE DASHBOARD

- The following 3 visuals were provided:
 - **Total sales over time** =the line charts shows the most selling Tea by time
 - **Sales by country** =This bar charts shows which country is the largest consumer of the tea
 - **Top 5 customers** = This bar charts shows us the top 5 customers
 - **Slicers were used to filter out the data even more**
 - **Roast type slicer** = tells us about the roast type of Tea
 - **Size Slicer** = tells us about the quantity of the tea sold (Kg)
 - **Loyalty card slicer** = tells us about the loyalty program
 - **Order date slicer** = tells us about the order date for the tea



PROBLEM OUTCOMES

- The following are some important insights derived from the dashboard:
 - **Oolong tea and kamairicha** are the most sold out tea from 2019 to 2022.
 - **2.5kg** is the top tea package sold
 - **0.5kg** is the least tea package sold
 - **Japan** is the Largest consumer of the teas.
 - **Found** out the top five customers .

Top five customers	
Customer Name	Sum of Sales
Derick Snow	\$251
Don Flintiff	\$278
Nealson Cuttler	\$282
Terri Farra	\$289
Allis Wilmore	\$317



CONCLUSION

- A Tea sales dashboard was built for Stakeholders depicting its various KPIs visually
- Relevant filters and interactions was provided in the dashboard
- This dashboard can be used for both high-level and in-depth analysis of KPIs across various dimensions
- The dashboard may not look good and design is not great as I prefer them making in power BI , but this is a Excel project so I have to create this one on excel.



THANK YOU!

