

Dashboard Analysis Report – Sokrio Technologies

1. Project Goal

The objective of this project was to design an **interactive sales performance dashboard** using **Power BI**. The dashboard should enable decision-makers at **Sokrio Technologies** to:

- Monitor overall sales and revenue trends.
 - Identify top-performing products and categories.
 - Compare sales performance across territories and buyer departments.
 - Evaluate the impact of discounts on order value.
 - Support better forecasting and strategic planning.
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2. Data Collection & Preprocessing

Data Source: Sales transaction records from Sokrio Technologies.

Preprocessing Steps:

- **Data Cleaning:** Removed duplicates and null records; dropped completely null fields (e.g., *unit1–unit5*, *free_with*, *promotion_id*).
- **Handling Missing Values:**
 - Categorical nulls (e.g., *latest_status*) → categorized as “Unknown.”
 - Numerical nulls (e.g., *units*) → rows with critical gaps removed.
 - Buyer-related fields with partial nulls retained for future enrichment.
- **Feature Engineering:**

- **DiscountGroup** → classified transactions into *With Discount* / *Without Discount*.
- **MonthYear** → formatted as *YYYY-MM* for monthly trend analysis.
- **Week No.** → extracted for weekly trend analysis.

Outcome: A clean and structured dataset with enhanced features, ready for dashboard visualization.

3. Analysis

Product Insights

- Pound Cakes and Sliced Cakes dominate revenue.
- The top 10 products account for a major share of overall sales, showing heavy reliance on a few SKUs.

Category Insights

- Pound Cake alone contributed ~39% of revenue.
- Muffins, Layer Cakes, and Fruit Cakes underperform compared to Pound and Sliced Cakes.

Revenue Trends

- Revenue peaked in **February 2024 (≈ 784K)**.
- Sharp decline observed in **May 2024 (≈ 12K)** → possible seasonal or supply chain issue.
- Weekly data showed fluctuations, suggesting demand inconsistency.

Territory Performance

- Territories **1406, 1401, and 1405** generated the highest order volumes.
- Some territories showed minimal contribution, representing untapped markets.

Discount Impact

- Orders *without discounts* had a higher Average Order Value (**≈ 26.9**) compared to those *with discounts* (**≈ 15.7**).
- Discounts did not significantly boost order volume, but reduced profitability.

Buyer Department Insights

- A small group of buyer departments (e.g., *Shree S Fast Food*, *Protasha*, *Rifk General Store*) generated disproportionately high revenue.
 - Heavy dependence on a few buyers poses both growth opportunities and risk.
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4. Key Findings

1. Revenue concentration in a limited set of products and categories.
 2. Seasonal sales variations with significant monthly fluctuations.
 3. **Territory imbalance**, with some areas far outperforming others.
 4. **The discounting strategy is ineffective**, lowering Average Order Value(AOV) without boosting sales enough.
 5. **Buyer dependency risk** due to reliance on a small group of high-value clients.
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5. Recommendations

- **Diversify Product Strategy:** Invest in marketing mid-level categories (Muffins, Layer Cakes) to reduce overreliance on Pound & Sliced Cakes.
- **Territory Expansion:** Replicate best-performing territory practices in weaker areas.
- **Optimize Discounts:** Shift from broad discounts to targeted promotions based on buyer behavior.
- **Strengthen Buyer Relations:** Develop loyalty programs for high-value buyer departments while expanding new partnerships.

- **Seasonal Forecasting:** Use historical monthly and weekly trends to align production and inventory planning with the demand cycle.
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