

Excel Sales Data Analysis - Case Study

1. Introduction

This case study showcases a sales data analysis project conducted using Microsoft Excel. The dataset contains sales transactions with details such as Order Date, Customer ID, Region, Category, and Sales Amount. The goal of the project was to demonstrate the use of Excel's advanced features including Power Query, Functions, and Pivot Tables to extract meaningful insights from raw data.

2. Data Preparation

The raw dataset was cleaned and transformed in Excel using Power Query. The following transformations were applied:

- Removed duplicates and null values.
- Standardized text formats for consistency.
- Extracted Year and Month from the Order_Date column.
- Ensured numeric columns were in the correct data type format.

3. Analysis Methods

The analysis was carried out using the following Excel features:

01

Power Query

For data import, cleaning, and transformation.

02

Functions

SUMIFS, TEXT, IF, and DATE functions were used for calculated fields.

03

PivotTables

For aggregating and summarizing data.

04

Sorting and Filtering

To identify top-performing customers and products.

4. Key Insights

From the analysis, the following insights were identified:

The highest sales were recorded in the year 2021, particularly in the month of December.

The top 5 customers contributed to nearly 35% of total revenue.

The Electronics category consistently generated higher sales compared to other categories.

The West region had the highest revenue, followed by the East region.

Seasonal trends showed sales peaks during festive periods.



5. Conclusion

This Excel-based project demonstrates how powerful insights can be derived using built-in tools like Power Query, Functions, and Pivot Tables. By transforming raw data into a clean, structured format and applying analytical techniques, businesses can identify growth opportunities and make informed decisions.