

Developing a Project Proposal

Executive Summary

The focus of this project is to use a comprehensive dataset that tracks sales data down to the smallest details to analyze a *French bakery's* daily transactions from 2021 to 2022. The goal is to identify trends in consumer purchase habits and product performance in order to improve sales tactics and optimize the range of products offered. The selection of this subject is the result of an interest in the dynamics of regional business operations and consumer patterns. The report includes findings on the most sold baked item, the most profitable month of the year, and the most profitable time of the day.

Why - Objectives and Goals

This project's main business case is to offer practical insights that will enable the bakery to boost sales, maximize inventory, and enhance customer happiness. The initiative specifically seeks to accomplish the following goals:

- 1. Identify Sales Patterns:** Recognize seasonality at the weekly and annual levels to modify manpower and inventories.
- 2. Product Performance:** To improve the product lineup, draw attention to the best-selling and worst-performing items.
- 3. Customer Purchase Trends:** Examine the frequency and timing of transactions to customize advertising strategies.

Who - Audience and Persona Documents

The primary audience for this project includes:

- **Bakery Management:** In search of strategic insights for decision-making in the areas of marketing tactics, operational enhancements, and product management.
- **Marketing Team:** Looks for information on consumer buying patterns to create marketing strategies that are specifically targeted.

Persona for Bakery Management:

- **Name:** Paul Walker
- **Role:** Bakery Manager
- **Goals:** Maximize profitability, streamline operations, enhance product offerings.
- **Needs:** Detailed reports needed on sales and product performance, customer preferences.

Persona for Marketing Team:

- **Name:** Katie Holmes
- **Role:** Marketing Director
- **Goals:** Boost foot traffic to the bakery with focused promotions, enhance consumer interaction with tailored marketing tactics, and optimize marketing campaign return on investment.
- **Needs:** Data-driven insights about the popularity of particular products, peak buying periods, and consumer purchasing patterns. In order to better target marketing efforts and monitor the effectiveness of marketing campaigns over time, there is a desire to segment the client base.

What - Dataset Description

The dataset includes 136,000 transactions with 234,005 entries, each of which is described by variables such as date, time, ticket number, article name, quantity, and unit price. The extensive size of this information, which enables a thorough examination of customer behavior and sales patterns, is what led to its selection. Both high-level overviews and in-depth product-specific analysis are supported by the data's granularity.

How - Presentation Strateg

The findings will be presented through a series of interactive Tableau dashboards, each focusing on different aspects of the analysis:

1. **Seasonal Trends Dashboard:** Displays sales trends over the days, weeks, and months to capture seasonal effects.
2. **Product Performance Dashboard:** Ranks products by sales volume and profitability.
3. **Customer Behavior Dashboard:** Analyses purchase times and frequency, correlating them with promotions and other relevant events.

Challenges and Peer Inquiry

Anticipated challenges include:

- **Data Cleanliness and Preparation:** Ensuring the data is clean and well-prepared for analysis.
- **Complexity in Visualization:** Balancing detailed data representation with user-friendly visualizations.

- **Interpreting Consumer Behavior:** Drawing accurate conclusions from purchase patterns and times.

Presentation Format

- The presentation will be in the form of a multi-frame data story.
- The presentation will be presented in a room with the stakeholders in a big screen by the Manager. It will also be accessible to view via tablet, mobile phone, desktop etc.