Project: Sales Performance Analysis

DESCRIPTION OF PROBLEM

Background:

Mike Goodman, the head of Product Management of a retail products company, is responsible for determining which products his company should continue to offer for sale and which products should be discontinued from the company’s product catalog.

Objective:

To build a dashboard that will present monthly sales performance by product segment and product category to help client identifying the segments and categories that have met or exceeded their sales targets, as well as those that have not met their sales targets.

Tasks To complete the Analysis –

1. Use the Saved Sample – Superstore dataset.
2. Create a bullet chart with Category and Segment dimensions and Sales measures.
3. Blend the data with the Saved Sample - Sales Target data set to bring in the Sales Target measure.
4. Color code the chart to identify Categories and Segments that are above or below target.
5. Add the year of sales to the view to identify trends and outliers.
6. Add a filter so that the user can select one, more than one, or all years.
7. Create a dashboard with this view.

Solution:

Following steps were undertaken to complete the said tasks, state above:

1. Add **Sample - Superstore** to data source, with Orders Sheet as the **primary data source**.
2. Drag **Category Dimension** and **Sales Measure** to Column Shelf.
3. Drag **Segment Dimension** to Row Shelf.
4. Add **Sales\_Target** Sheet to data source, with Sales Target Sheet as the **secondary data source**.
5. Blend Data by changing broken chain icon to orange chain icon in front of Order Date Dimension, making **Order Date, Category** and **Segment as the linking fields**.
6. Drag **Sales Target Measure** to Column Shelf.
7. Select **Bullet Chart** from **Show Me Feature**.
8. Arrange the Column and Row Shelves with **Category Dimension** and **Sales Target Measure** in Column Shelf and **Segment Dimension** in Row Shelf.
9. Swap Reference Line fields to generate **Sales Measure** in the Column Shelf and **Sales Target Measure** into Marks Shelf,
10. Add **Year of Order Date Dimension** to Column Shelf and converted it to **Month of Order Date**.
11. Add **Year of Order Date Dimension** to the Filter Shelf and convert the recently appeared filter on the top right corner of the workspace to Single Value (Slider).
12. Created a Calculated Field called "Target Matrix" with the following formula:

**IF SUM([Sales]) >= SUM([Sales Target (Sales\_Target)].[Sales Target]) THEN "Above Target"**

**ELSE "Below Target"**

**END**

1. Drag and drop Target Matrix Measure onto the Color Tab in Mark Shelf.
2. Re-name the sheet as “Sales Performance vs Target”.
3. Hide the unnecessary axis/column labels.
4. Create a Dashboard and drag and drop Sales Performance vs Target Sheet from the Sheet Section in the Dashboard Tab.
5. Re-arrange the Worksheet, Filter and the Legends section as visible in the final document.