Project Charter

Project Title: UrbanMart Retail Optimization Analysis

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Date: March 2025

Version: 1.0

Note: *This project was independently conducted with curated analytical support from ChatGPT. The AI was used as a collaborative assistant to simulate real-world Business Analyst mentorship, helping structure the workflow, validate analytical approaches, and refine business communication throughout the project.*

This analysis was conducted using publicly available sample data from Tableau's Superstore dataset, repurposed under the fictional brand name UrbanMart for portfolio presentation purposes.

Dataset Source: https://public.tableau.com/app/learn/sample-data

1. Business Context

UrbanMart is a growing mid-size retail company operating across multiple U.S. regions. While the company continues to expand its customer base and product assortment, management has raised concerns over stagnating profit margins and uneven performance across product lines and customer segments.

2. Problem Statement

Despite rising sales, profitability has plateaued. Some sub-categories consistently operate at a loss, while discounting practices appear to erode margins. There's limited visibility into customer behavior, regional performance trends, and the effectiveness of current pricing strategies. A data-driven assessment is required to identify root inefficiencies and guide corrective action.

3. Project Objectives

This analysis aims to:

- Identify the top-performing and underperforming products and sub-categories

- Analyze customer segment profitability and purchase trends

- Evaluate regional sales and margin disparities

- Investigate the impact of discounting on profitability

- Recommend actionable improvements to pricing, segmentation strategy, and product focus

4. Scope of Work

The project utilized the following data types from the cleaned dataset:

- **Sales Data:** Order IDs, order dates, ship dates, sales, quantity, discount, profit

- **Customer Data:** Customer name, region, segment

- **Product Data:** Product name, category, sub-category

- **KPI Framework:** Gross revenue, total profit, profit margin, average order value, category-level sales

The analysis was conducted using Python (Pandas, Matplotlib), Excel (pivot-based insights), and Tableau (interactive dashboards).

5. Stakeholders

- **Head of Sales** – Interested in identifying regional underperformance

- **Chief Marketing Officer (CMO)** – Focused on customer behavior and segmentation strategy

- **Chief Operating Officer (COO)** – Project sponsor, wants overall margin improvement and profitability recovery

6. Expected Deliverables

- Cleaned and structured dataset (.xlsx, .csv)

- Exploratory Data Analysis and KPI calculations (Python Notebooks & Excel)

- Executive business insights report

- Tableau dashboard visualizing key KPIs and sales breakdowns

- Final documentation: Business Report