

Data-Driven Storytelling Presentation:

ACCOUNT PERFORMANCE AND ANALYTICS

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INTRODUCTION

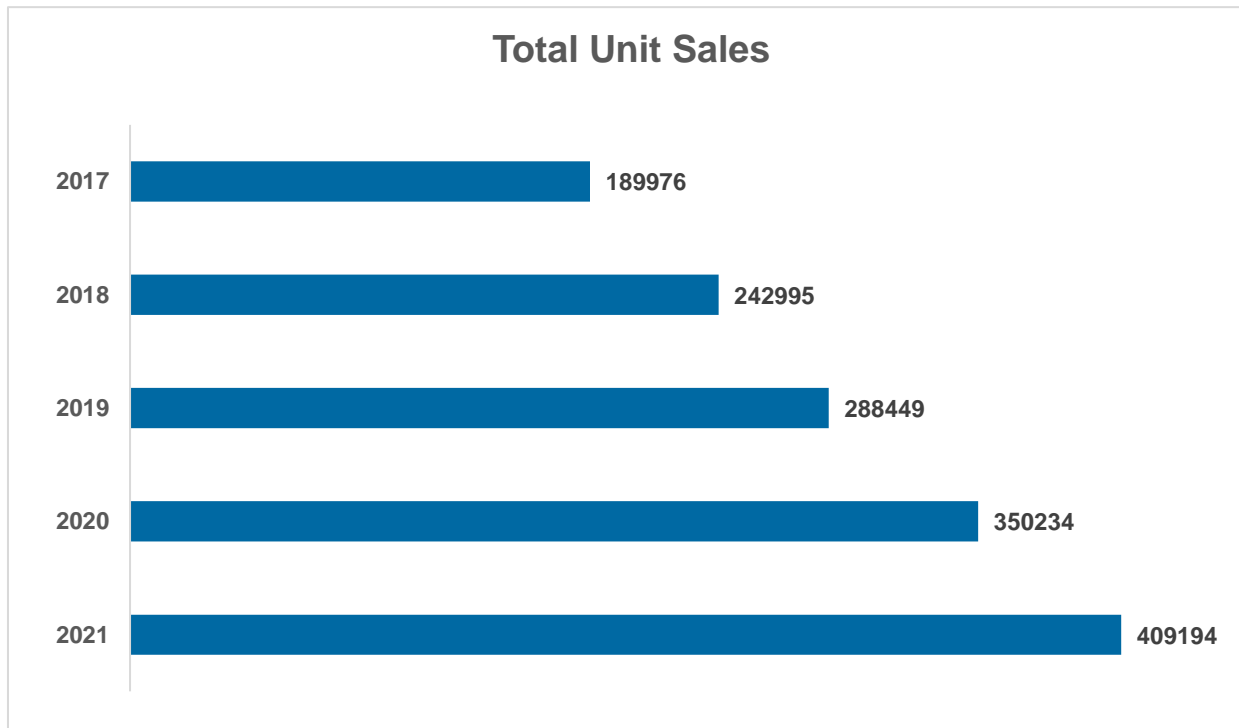
J.P. Morgan Chase & Co., a leading global financial services firm, operates worldwide and is focused on analyzing account performance metrics over the past 5 years (2017-2021). The company aims to understand the factors influencing the compound annual growth rate (CAGR) in unit sales and identify areas for potential improvement.

Objectives:

- Assessing the total unit sales for each year.
 - Analyzing year-over-year sales growth.
 - Determining which account types lead in unit sales.
 - Calculating the average 5-year compound annual growth rate (CAGR) across different account types.
 - Identifying the top-performing and bottom-performing accounts.
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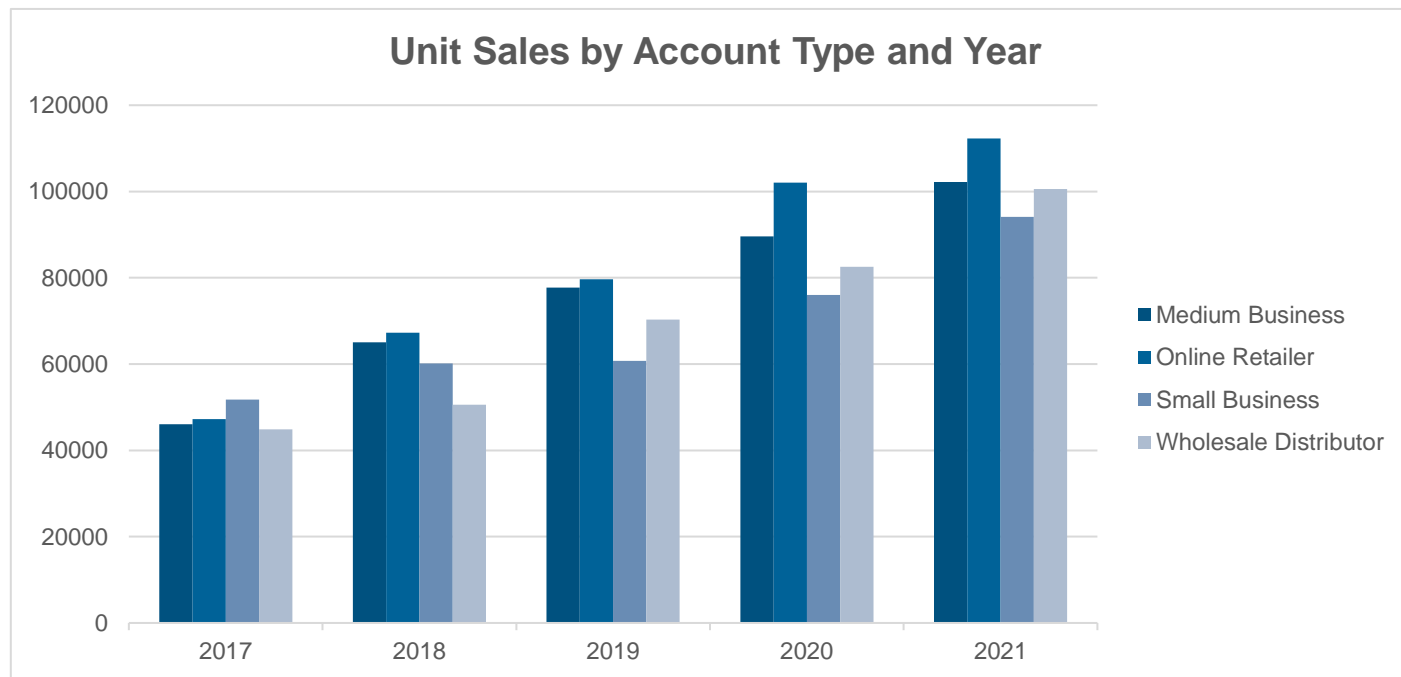
DATA ANALYSIS AND VIZUALIZATION

Upward trend in total unit sales from 2017 to 2021, reflecting significant growth each year.



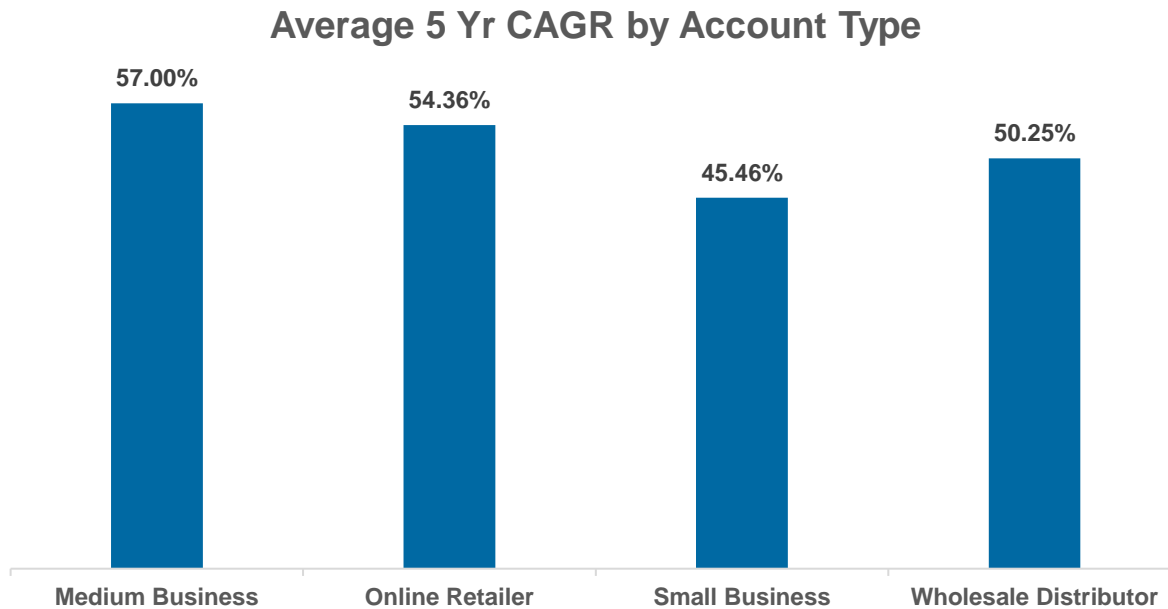
DATA ANALYSIS AND VIZUALIZATION

There is a steady growth in unit sales across all account types from 2017 to 2021, with **Online Retailer** consistently leading and experiencing the most significant increase, particularly in the final year.



DATA ANALYSIS AND VIZUALIZATION

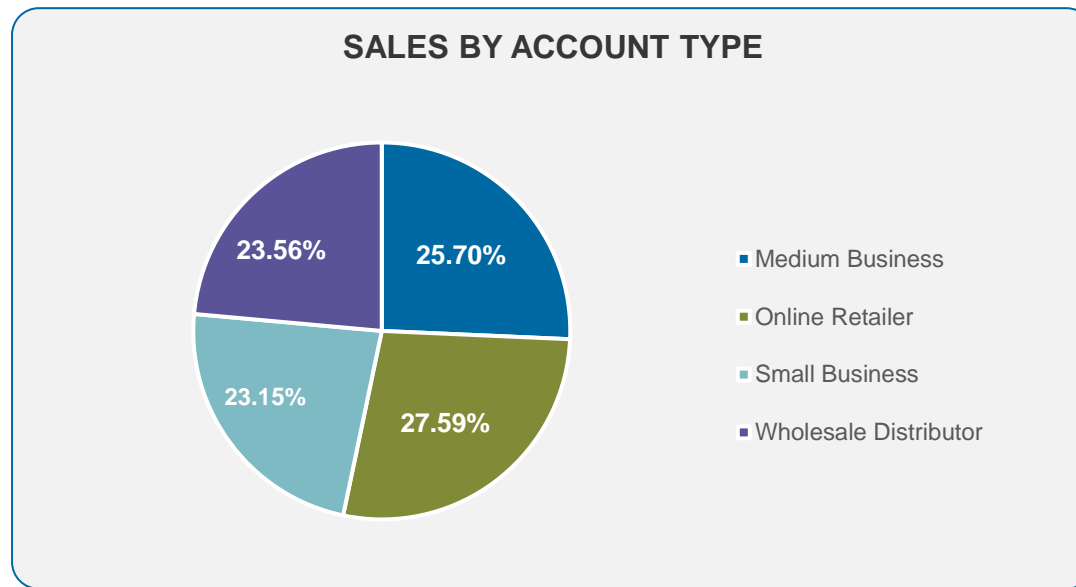
Medium Businesses and **Online Retailers** achieved the highest 5-year average CAGR, with 57% and 54.36% respectively



DATA ANALYSIS AND VIZUALIZATION

Online Retailer leading at 27.59%, followed closely by **Medium Business** at 25.70%,

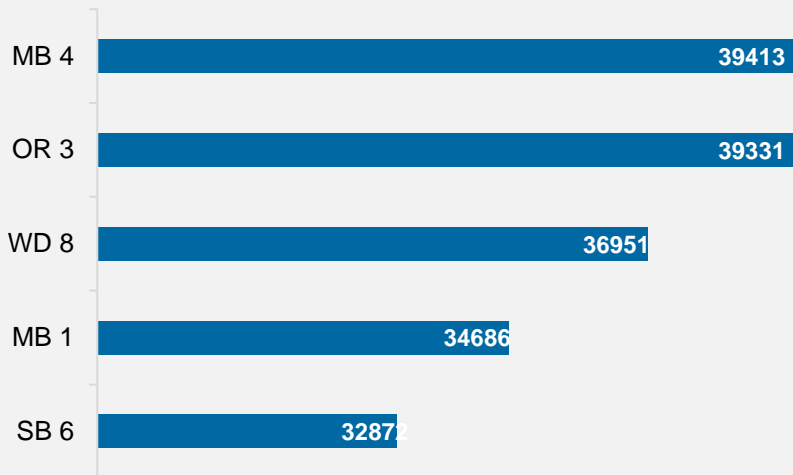
Wholesale Distributor and Small Business have similar shares at 23.56% and 23.15% respectively, indicating a relatively balanced sales distribution with a slight edge for online and medium-sized business customers.



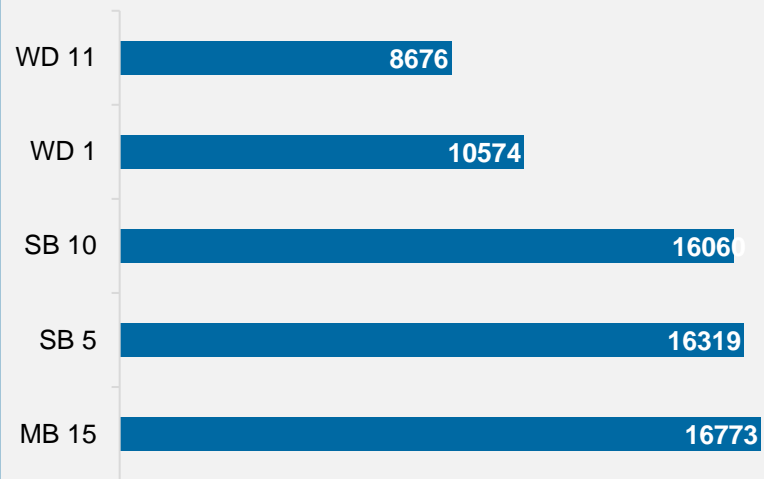
DATA ANALYSIS AND VIZUALIZATION

- The account named **MB4** emerged as the top performer, delivering an impressive sales volume of around 39,413 units
- In contrast, accounts **WD11**, **WD1**, and **SB10** had the lowest sales volumes, with WD11 at 8,676 units, WD1 at 10,574 units, and SB10 at 16,060 units.

TOP PERFORMING ACCOUNTS BY SALES



LOWEST PERFORMING ACCOUNTS BY SALES



KEY INSIGHTS

- Medium Business accounts show higher profitability, driven by a strong 5-year CAGR.
- Online Retailers lead with 408,515 units sold (28% of total), followed by Medium Business with 380,568 units (26%).
- MB4 is the top account with 39,413 units sold, while WD11, WD1, and SB10 have the lowest sales.
- Total sales reached 1,480,848 units, with steady growth but fluctuating year-over-year trends.
- Catalog Inclusion is the preferred marketing channel; posters are underutilized.
- Sixteen accounts reported a negative CAGR, signaling concern.
- Only small businesses and online retailers use all four marketing channels, highlighting a usage gap.
- The 5-year CAGR in sales is 51.8%, led by Yonkers and Bronx regions.

CONCLUSION

While overall sales performance has been adequate, there is considerable potential for further improvement.

The CAGR and Unit Sales have generally shown positive results during 2017-2021, there are some areas of concern, particularly regarding the use of marketing channels and the decline in unit sales for certain accounts.

Eliminating underperforming accounts could free up crucial sales and marketing resources.

Shift more focus to social media marketing to capture a broader audience, especially for online retailers.

Apply the successful strategies from Yonkers to other regions with lower growth rates to drive regional performance.

Analyze the causes of YoY fluctuations to implement strategies that ensure consistent sales growth.

Replicate the success of top-performing Medium Business accounts across the segment to maximize profitability.

THANK YOU
