

Data-Driven Storytelling Presentation:

ACCOUNT PERFORMANCE METRICS AND SALES TREND

BY
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INTRODUCTION

Problem Statement

- J.P. Morgan Chase & Co. is a leading global financial services firm that offers services and operates worldwide.
- The company aims to analyze the account performance metrics over the last 5 years (2017-2021) and the factors contributing to its compound annual growth rate (CAGR) in unit sales. This includes identifying opportunities for further improvement.

Business Questions

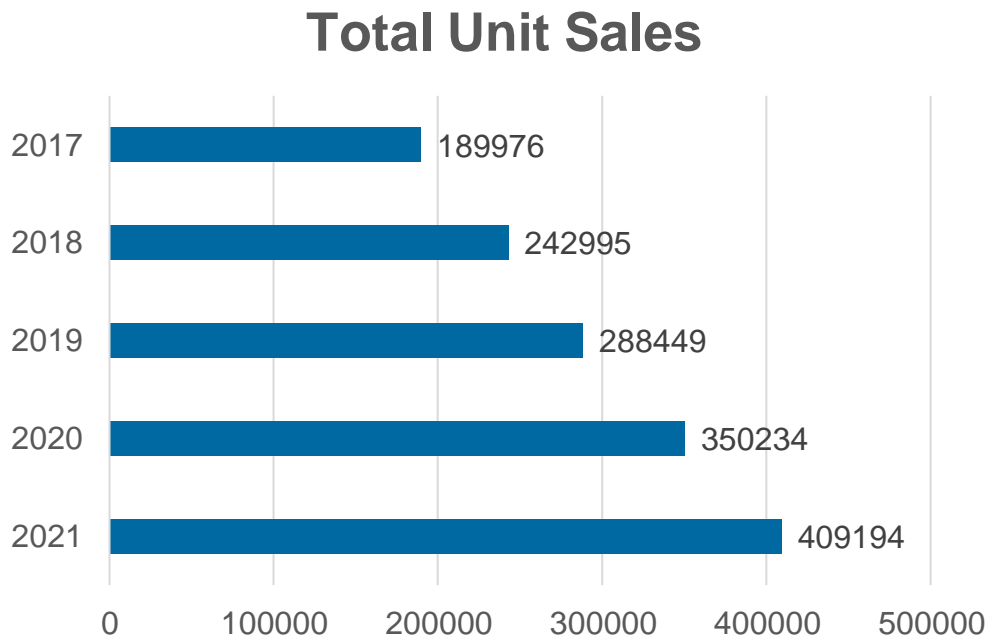
- Examining the total unit sales for each year.
- Analyzing the year-over-year growth in sales.
- Identifying which account types are surpassing others in terms of unit sales.
- Calculating the average 5-year compound annual growth rate (CAGR) based on different account types.
- Evaluating the top-performing and bottom-performing accounts.

DATA MODELLING

Utilizing Power Query in **MS-Excel**, transformed the data for improved organization, giving a more structured foundation for necessary analysis.

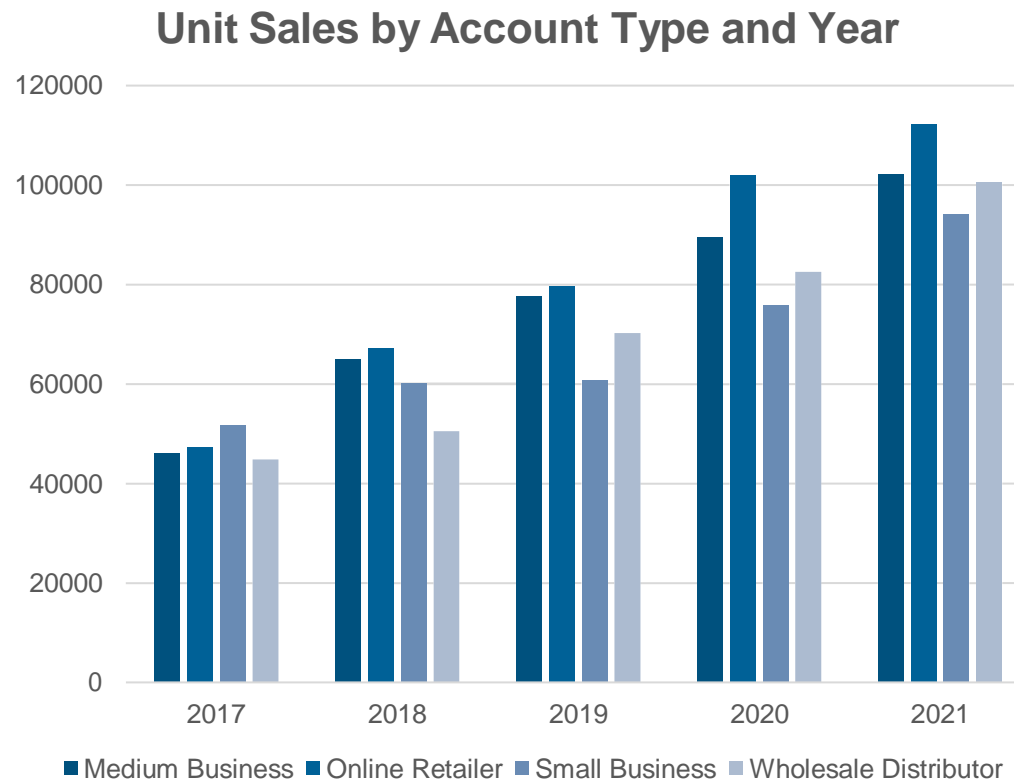
DATA ANALYSIS & VISUALIZATION

Overall, our unit sales growth has been good, with a 5- year CAGR of **21%**



DATA ANALYSIS & VISUALIZATION

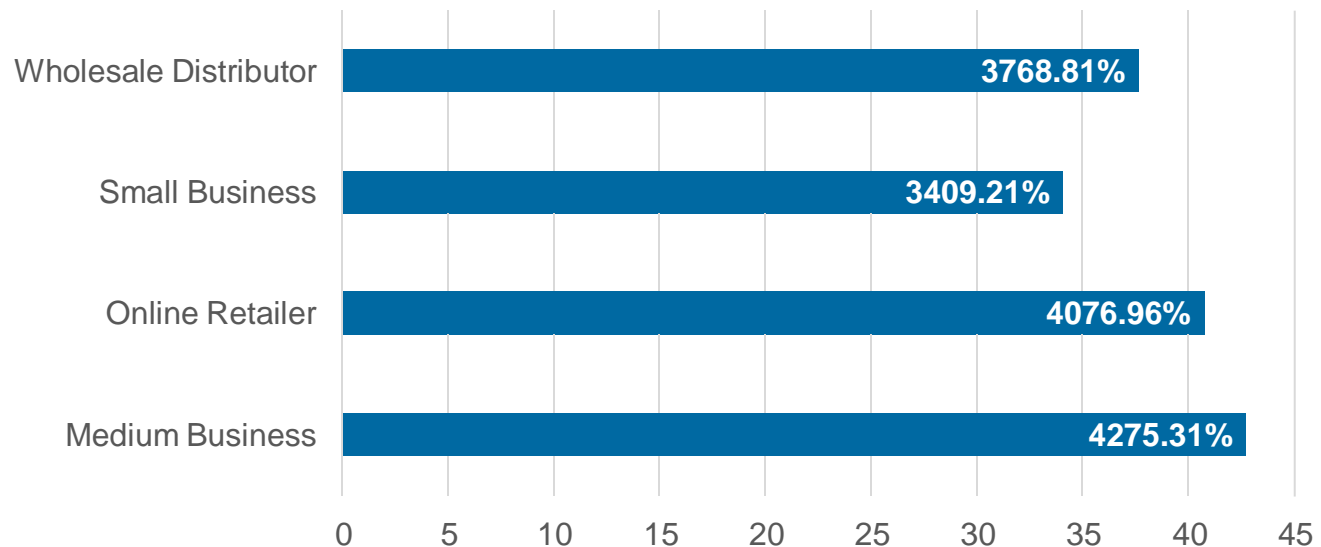
Directing our sales resources and adjusting our sales mix towards **online retailer accounts** could lead to enhanced sales growth.



DATA ANALYSIS & VISUALIZATION

However, **Medium Business** account type is experiencing higher profitability driven by the average 5-year CAGR.

Average of 5YR CAGR by Account Type

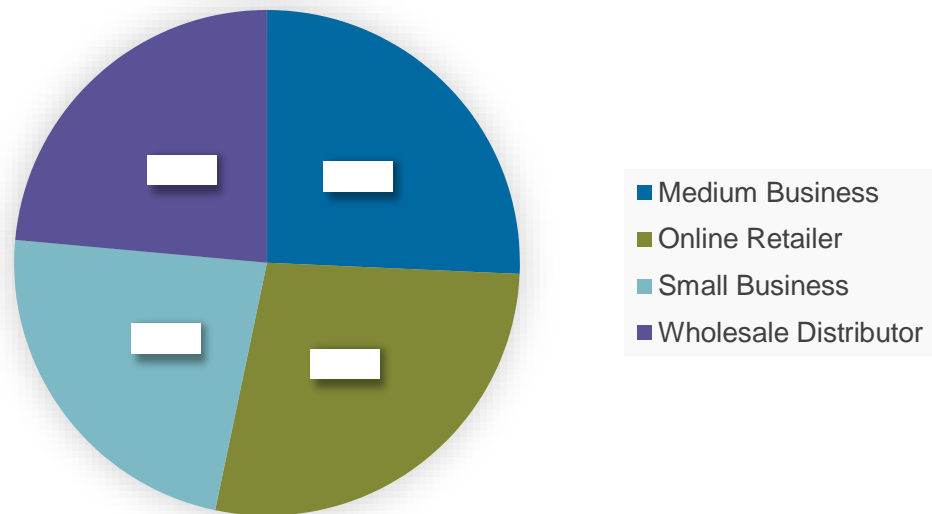


DATA ANALYSIS & VISUALIZATION

Online Retailer generated the highest sales volume, totaling **408,515 units**, which accounts for **28%** of the total sales volume.

Medium Business followed closely with a sales volume of **380,568 units**, making up **26%** of the total sales volume.

Sales by Account Type

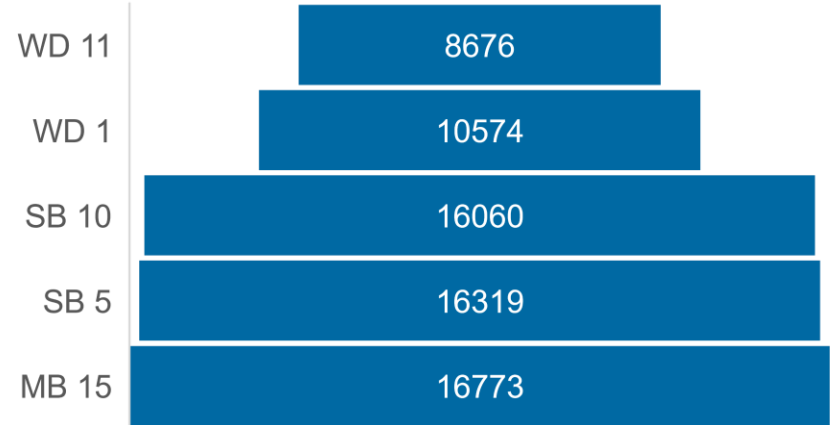


DATA ANALYSIS & VISUALIZATION

TOP 5 ACCOUNTS



BOTTOM 5 ACCOUNTS



The account name **MB4** proved to be the **highest**-performing account, achieving an impressive sales volume of approximately **39,413 units**.

On the other hand, accounts **WD11**, **WD1**, and **SB10** performed at the **lowest** level in terms of sales volume. Specifically, WD11 accounted for 8,676 units, WD1 for 10,574 units, and SB10 for 16,060 units, all in terms of sales volume

SUMMARY

- Despite satisfactory overall sales performance, there is ample room for significant improvement.
- Discontinuing poorly performing accounts would free up valuable sales and marketing resources.
- Notably, the past five years have witnessed the most robust sales growth in the online retailer account category.
- By reallocating the resources saved from closing underperforming accounts to online retailer accounts, sales growth could be maximized.
- It is advisable to promptly close these underperforming accounts and launch an initiative to identify high-potential online retailer accounts deserving of increased sales and marketing focus.