

Insight Report for Sales Performance Dashboard

Objective:

To analyze current sales performance against the previous year's performance and highlight areas of growth or decline across various dimensions such as region, product category, and time.

Data Overview:

1. **Customers** – Customer ID and Name
2. **Location**– Postal Code, City, State, Region, Country
3. **Orders** – Orders with Dates, Customer ID, Product ID, Sales, Quantity, Profit
4. **Products** – Product ID, Category, Sub-Category, Product Name

Key Performance Indicators (KPIs) Overview:

In this dashboard, the following KPIs were used to assess the performance of the business across different time periods, regions, and product categories:

1. Sales

Sales represent the total revenue generated from customer orders. This is the primary indicator of business growth and market demand. By comparing sales across years, quarters, and regions, we identified patterns in customer buying behavior, peak seasons, and high-performing segments.

2. Profit

Profit measures the financial gain after deducting discounts and costs. Analyzing profit in conjunction with sales helps assess the true financial health of the business. While high sales may indicate good volume, profit highlights whether that volume is sustainable and strategically beneficial. Profit margin was also considered to evaluate efficiency across products and geographies.

3. Quantity Sold

This refers to the total number of items sold and serves as a supporting metric to understand volume trends. It helps identify whether changes in sales are driven by price changes, bundling strategies, or actual customer demand. It also helps assess operational load and inventory planning needs.

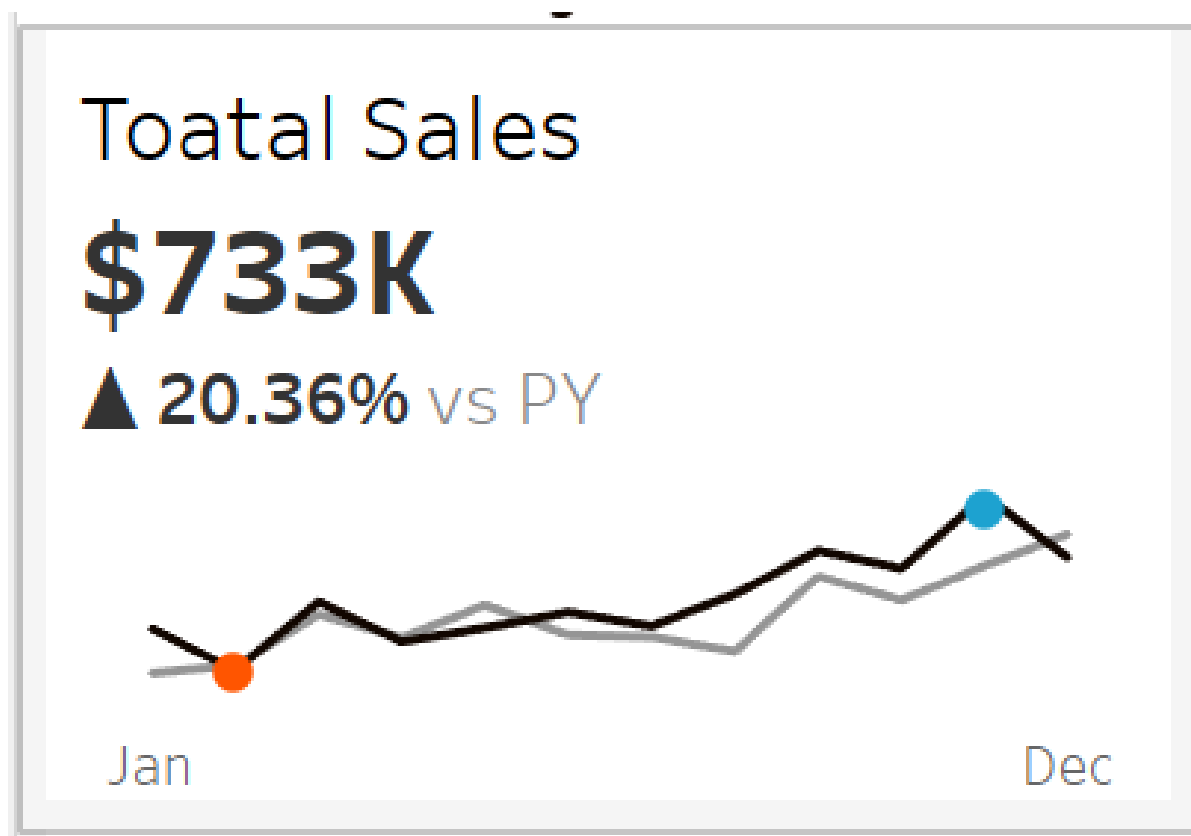
KPI Snapshots Overview:

To provide a quick and effective overview of overall business performance, key performance indicators (KPIs) have been visually summarized using snapshot cards. These KPIs—including Total Sales, Total Profit, and Quantity Sold—offer immediate insights into how the business is performing at a glance.

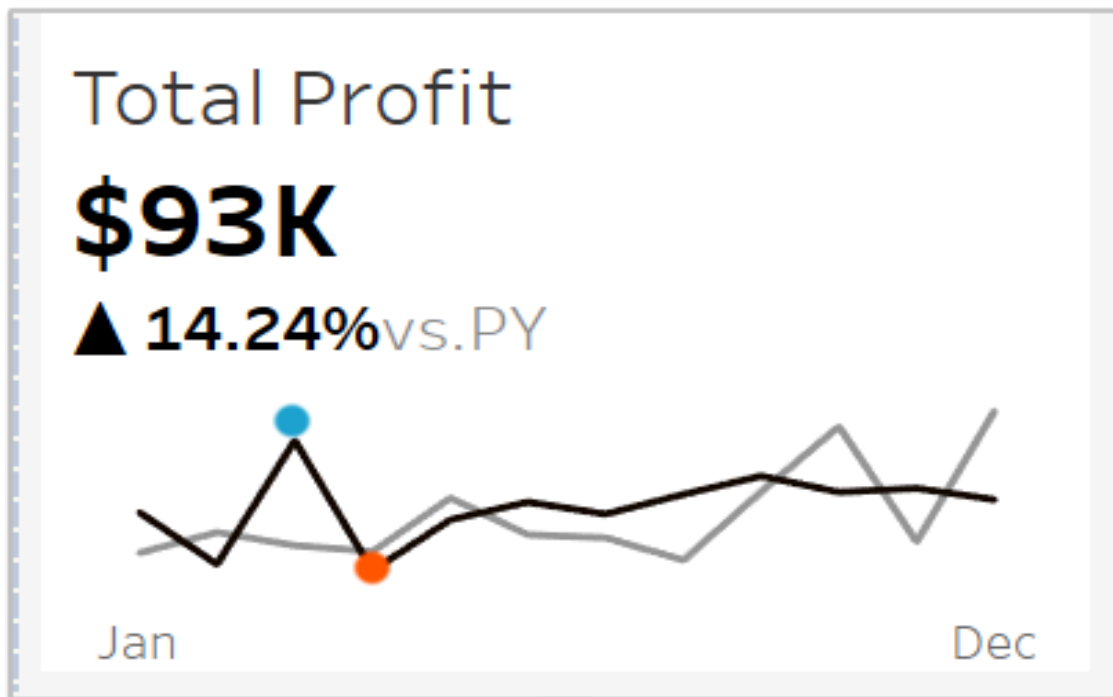
Each snapshot highlights the current value, comparison with the previous year or period, and percentage change, helping stakeholders quickly identify growth trends or potential issues. This high-level summary enables decision-makers to monitor progress toward strategic goals, assess operational efficiency, and identify where deeper analysis may be needed.

KPI Snapshots:

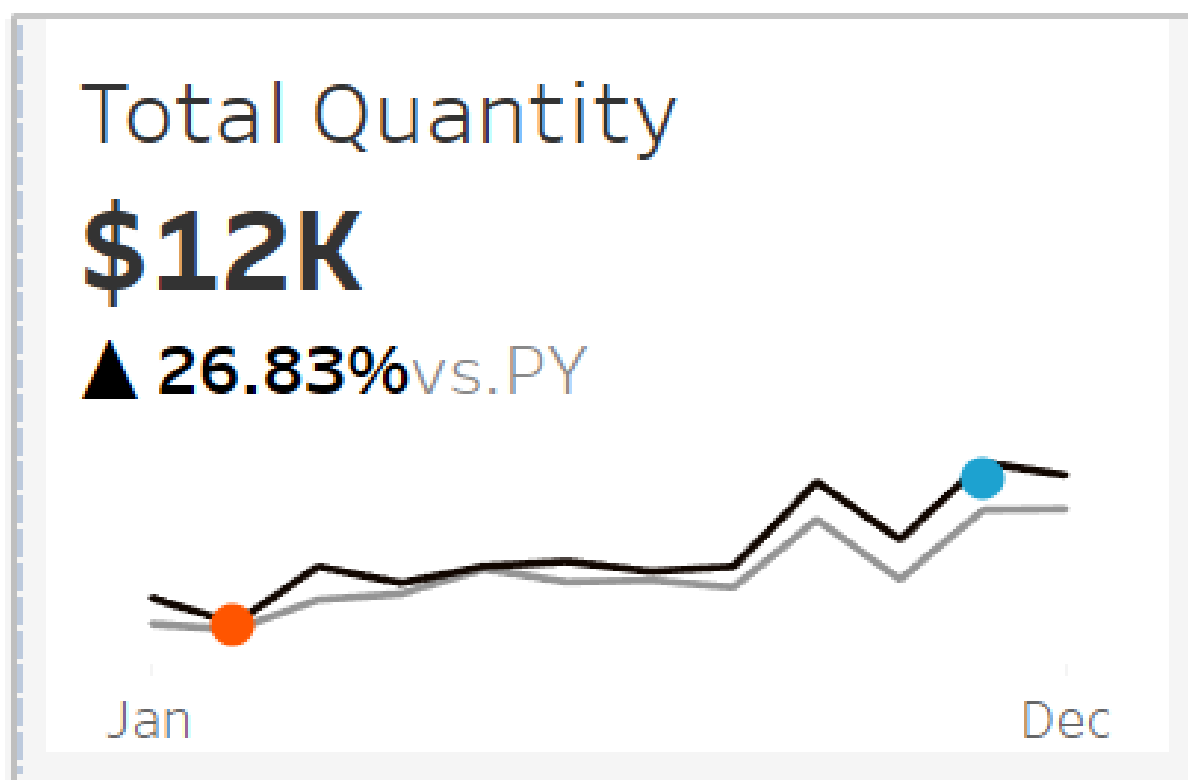
Total Sales:



Total profit:



Total Quantity :



Overall, this KPIs provides a balanced view of product-level performance, guiding smarter product management and resource allocation decisions.

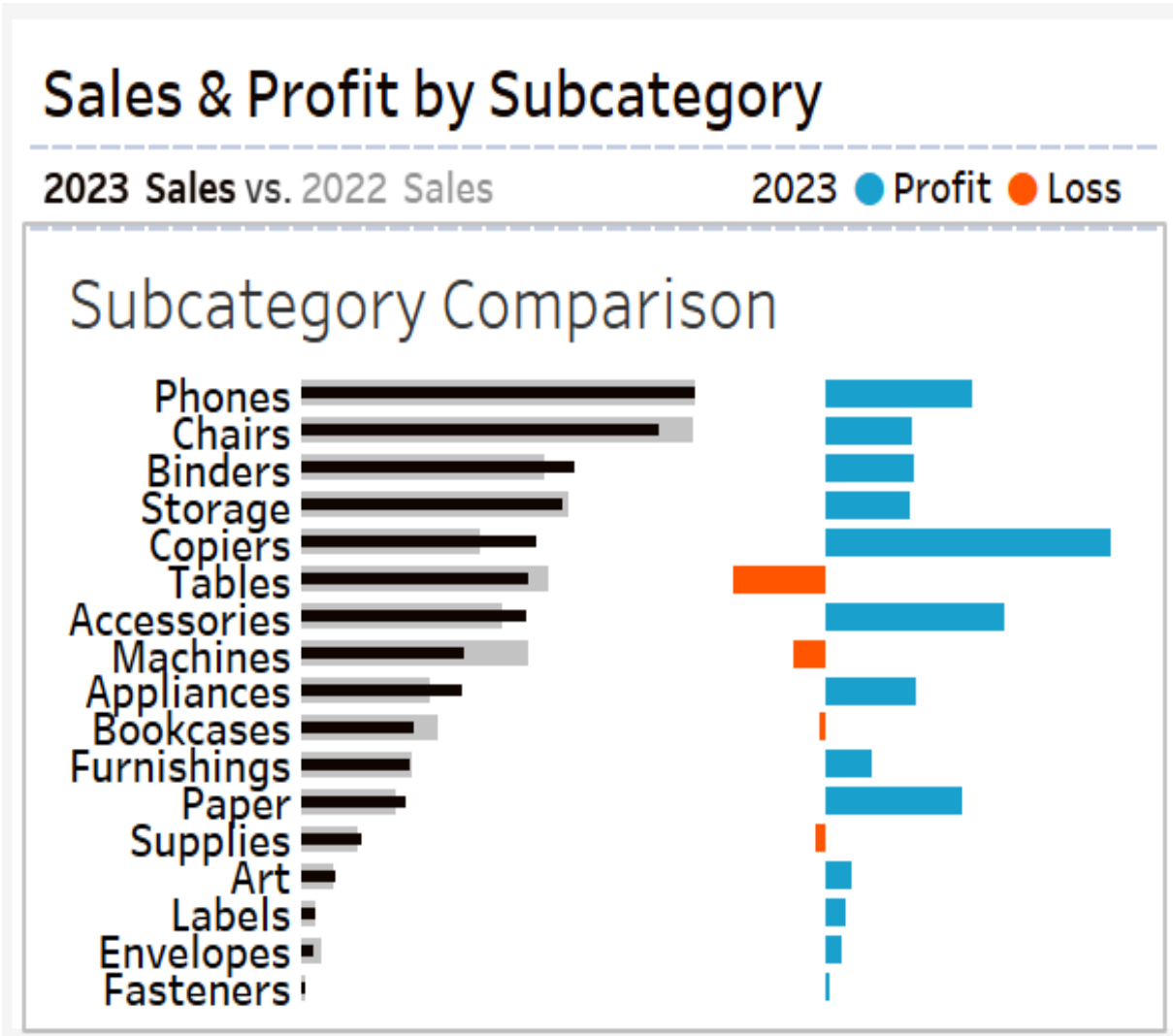


Sales and Profit by Sub-Category:

This section provides a comparative analysis of total sales and profit across different product sub-categories. By visualizing both revenue generation and profitability, we gain deeper insight into which product lines are not only popular but also financially efficient.

Sub-categories such as [**Phones, Copiers, Accessories, Papers**] emerged as strong contributors, delivering both high sales and substantial profits. On the other hand, some categories—like [**Bookcases, Supplies, Machines, Tables**]—although generating significant revenue, reflected lower profit margins. This suggests potential issues with cost structure, discounting strategies, or inventory overhead.

Sales and Profit by Sub-Category Snapshots:

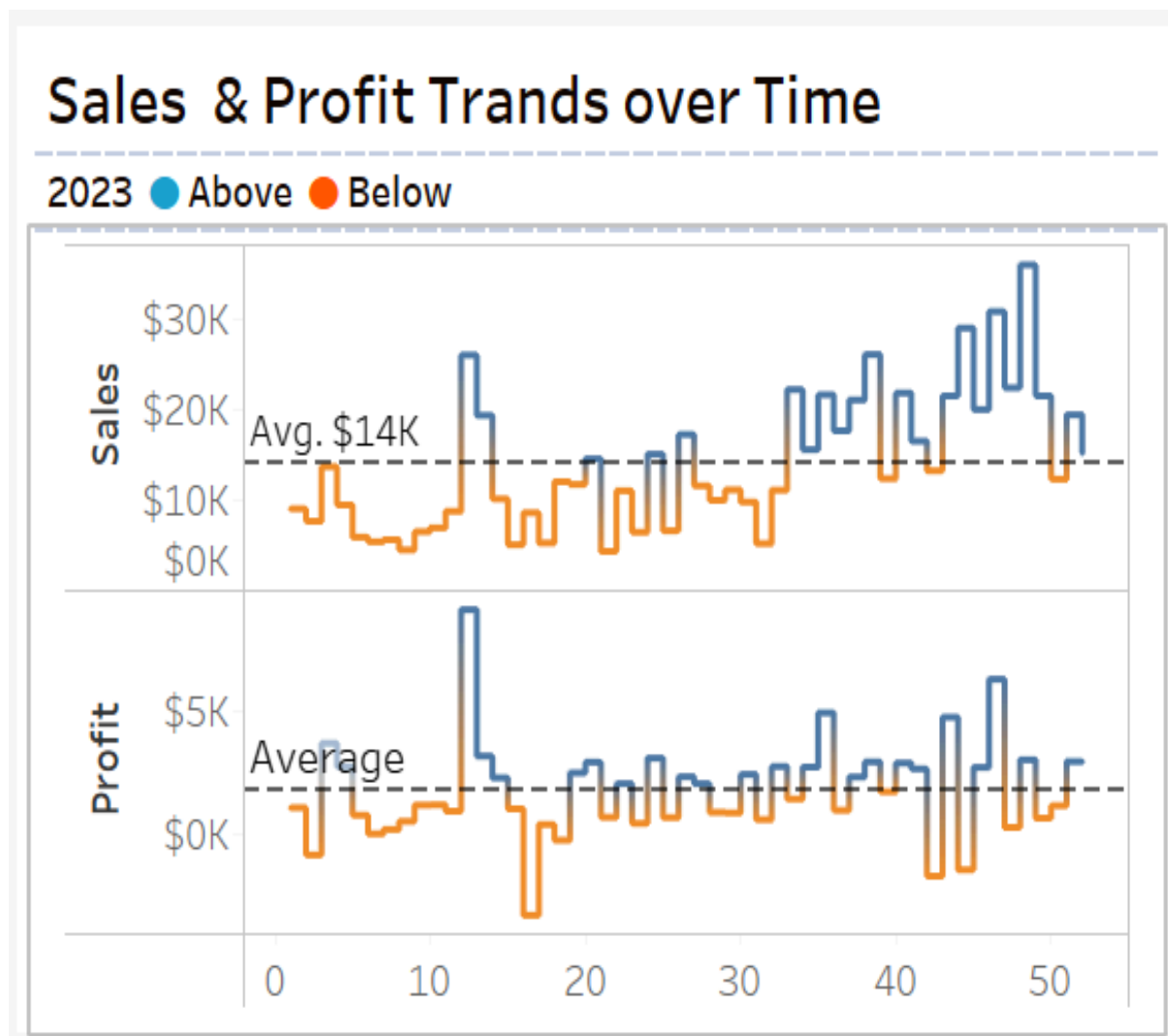


Sales and Profit Trends Over Time:

The analysis of sales and profit trends over time provides critical insights into the business's performance dynamics across weeks, months and quarters. By tracking fluctuations in revenue and profitability, we can identify seasonality, growth patterns, and potential areas of concern.

- **Certain periods, such as [week3, week15, week16, week42], showed dips** in both sales and profit, which may reflect external market conditions, operational challenges, or demand slowdowns.
- While revenue growth was steady, **profit trends varied**, suggesting changes in discounting, cost structures, or product mix.

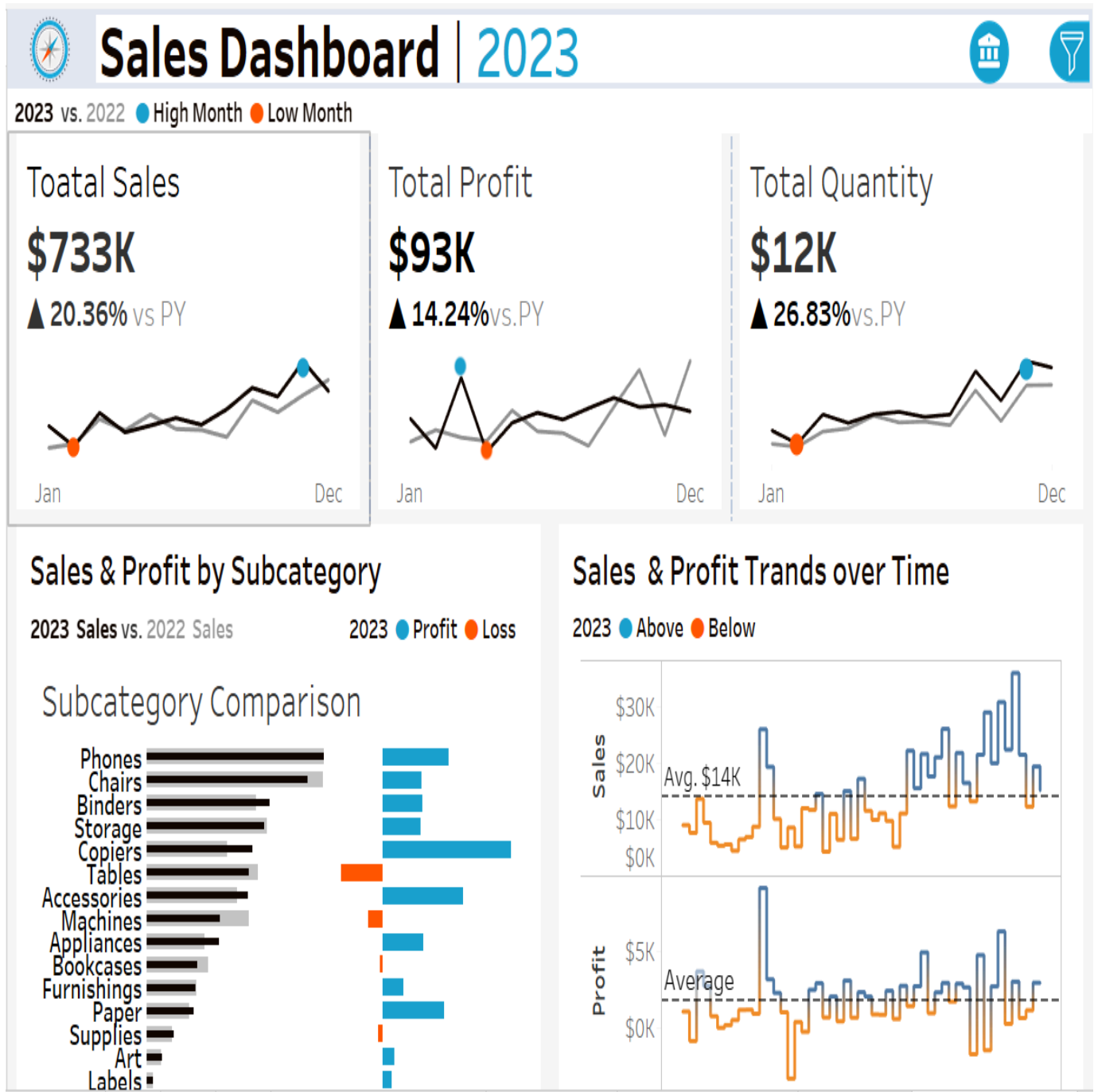
Sales and Profit Trends Over Time Snapshots:



Dashboard Summary: Sales Performance Overview:

This interactive dashboard provides a 360-degree view of business performance, focusing on sales, profit, and operational efficiency across time, product categories, customer segments, and regions. It enables stakeholders to monitor key metrics, identify trends, and make informed, data-driven decisions.

Dashboard Snapshot:



✓ Key Features and Insights Covered:

1. KPI Snapshots

The top-level KPIs—Total Sales, Total Profit, and Quantity Sold—are displayed in a clean, concise format. Each KPI includes current values and comparisons with previous periods to instantly communicate business direction and momentum.

2. Sales and Profit Trends Over Time

Line and area charts visualize sales and profit over months and years. These highlight:

- Seasonal trends
- Business growth trajectory
- Profitability inconsistencies even during high-revenue periods

3. Performance by Product Sub-Category

A bar chart or table compares **Sales vs Profit by Sub-Category**, helping uncover:

- High-performing categories (e.g., Phones, Chairs)
- Low-margin segments (e.g., Tables) that may require strategic review

4. Regional Analysis

Sales and profit are broken down by **Region** and **State**, allowing for:

- Geographic opportunity identification
- Targeted campaign planning in underperforming areas
- Recognition of regional best-sellers.

5. Year-over-Year Comparison

Using calculated fields (like `IF SUM([Sales]) < SUM([PY Sales]) THEN '●' ...`), the dashboard highlights whether sales and profit have improved or declined year-over-year across all dimensions. Symbols or color indicators make performance drops easy to spot.

6. Customer Insights

We can add a table or visualization that shows **top customers by revenue**, and potentially repeat buyers. This enables personalized engagement and prioritization of high-value clients.

✓ Recommendations:

Based on the analysis of sales, profit, and quantity trends across time, regions, and product sub-categories, the following recommendations are proposed to improve performance and drive strategic growth:

1. Focus on High-Margin Sub-Categories

Sub-categories such as [**Phones, Copiers, Accessories, Papers**] delivered both high revenue and strong profitability. Continued investment in promoting and bundling these products is advised to maximize return on marketing spend.

2. Reevaluate Low-Profit Segments

Sub-categories like [**Bookcases, Supplies, Machines, Tables**] showed high sales volume but low or negative profit. Review pricing strategies, supplier contracts, or discontinue underperforming SKUs to protect margins.

3. Target Low-Performing Regions

Regions such as [**South and west**] underperformed compared to others. Launch localized marketing campaigns or explore regional partnerships to boost visibility and demand in these markets.

4. Capitalize on Seasonal Demand

Historical data shows clear spikes in some weeks in Sales and Profit Trends Over Time chart . Plan inventory, promotions, and staffing in advance to take full advantage of these seasonal opportunities.

📌 Technical Highlights:

- Built in **Tableau**
- Uses **calculated fields** for YoY comparisons
- Data blended from multiple sources: Customers, Orders, Products, Locations
- Interactive filters for time, region, category, and segment.

Links:

Dashboard link —> [Link](#)

Github link —> [Link](#)

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