

Prepared for: Data Analyst

Prepared by: Client Stakeholder (Chief Sales Officer)

Subject: Requirements for Comprehensive Sales Performance Analysis

1. Introduction & Business Objective

Our company has accumulated of sales data. We need to transform this raw data into actionable business intelligence to understand our performance, identify growth opportunities, and optimize our operations. The primary objective of this project is to use SQL to analyze the provided `Sales.csv` dataset and deliver insights that will inform our strategic decision-making for the upcoming fiscal year.

2. Scope of Work

The analysis will be conducted using **Microsoft SQL Server Management Studio (SSMS)**. The final deliverable will be a single SQL script (`.sql` file) containing all the queries used to generate the results, accompanied by a summary report of key findings.

3. Key Business Questions & Analysis Requirements

We need your analysis to answer the following questions, organized by category:

A. Overall Performance & Trends

1. **Total Sales Overview:** What is the total revenue generated, and what is the total number of orders?
2. **Sales Trend:** How have total sales trended over time? (Show monthly or quarterly sales trends).
3. **Year-over-Year Growth:** Calculate the year-over-year growth rate for sales.

B. Product Analysis

1. Top Performers:

- What are our top 10 products by total sales?
- What are the top 10 products by quantity sold?

2. Category & Sub-Category Performance:

- What is the total sales and average order value for each product `Category` (e.g., Furniture, Office Supplies, Technology)?
- Drill down further: what is the performance within each `Sub-Category` (e.g., Chairs, Tables, Phones, Binders)?

3. Product Portfolio: How many unique products do we sell?

C. Customer Analysis

1. Customer Segmentation:

- Who are our top 10 customers by total spending?
- What is the sales distribution across different **Segments** (Consumer, Corporate, Home Office)?

2. Customer Value: What is the average sales value per customer?

D. Geographic Analysis

1. Regional Performance:

- How do sales differ across various **Regions** and **States**?
- Which **City** is our top-performing city by sales?

2. Country Focus: Since all our sales are in the US, which states are the top 5 and bottom 5 contributors to revenue?

E. Operational Analysis

1. Shipping Analysis:

- What is the most commonly used **Ship Mode**?
- Is there a correlation between **Ship Mode** and average sales value or profit?

2. Sales Velocity: What is the average number of days between **Order Date** and **Ship Date**?

4. Specific Deliverables

Please provide the following:

A Single SQL Script File (Sales_Analysis.sql):

- This file should contain all the SQL queries used for the analysis.
- Each query should be clearly commented with the business question it answers (e.g., `-- 1. Total Sales Overview`).
- The script should be well-organized and able to run from top to bottom without errors.

5. Technical Notes & Data Considerations

- The `Sales` column is the monetary value of each transaction.
- Be mindful of the date format (`DD/MM/YYYY`). You may need to use `CONVERT` or other functions to handle it correctly in SQL Server.
- Some orders (`Order ID`) contain multiple products. Your analysis should account for this where necessary (e.g., calculating average order value).
- Assume the data is clean, but please note any obvious data quality issues you encounter.

6. Success Criteria

The project will be considered successful if:

- The SQL script executes without errors and produces accurate results.
- The analysis comprehensively addresses all questions outlined in Section 3.
- The summary report provides clear, concise, and actionable insights that are easily understood by non-technical management.