



# Sales and Customer Insights Dashboard:

## A Tableau-Driven Business Intelligence Solution



### Business Problem

The company lacked an integrated and interactive system to monitor sales performance and customer behaviour effectively. Key challenges included:

- Inability to track year-over-year (YoY) sales and profit performance with clarity.
- No granular insights into sales trends across time, categories, or customer segments.
- Limited visibility into customer engagement patterns and loyalty.
- Manual and time-consuming data analysis processes that delayed strategic decision-making.

To resolve this, there was a need for two separate yet interconnected dashboards- **Sales** and **Customer**, that would equip sales and marketing teams with real-time insights and actionable intelligence.

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### Analysis

The project involved designing two Tableau dashboards based on historical sales and customer data:

#### Sales Dashboard

- Aggregated KPIs (Sales, Profit, Quantity) for current and previous years.
- Monthly and weekly trend analyses.
- Comparative analysis of product subcategories.
- Highlighted peak and low performance periods.

#### Customer Dashboard

- Customer KPIs (Total Customers, Orders, Sales per Customer).
- Monthly trends and behavioral breakdowns.
- Distribution analysis by number of orders.
- Identification of Top 10 most profitable customers with supporting metrics.

Interactivity and filtering were built in using:

- Dynamic year selection.
  - Filter controls by region, state, city, product category, and subcategory.
  - Interactive chart components for deeper drill-downs.
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## Business Insights (with numbers)

### Sales, profit and quantity KPIs:

- Total sales **increased significantly**, especially from **2021 to 2022 (+29.3%)**, showing strong sales recovery and growth, followed by a healthy **20.36% rise** in 2023.
- Quantity sold grew steadily **+25% in 2022**, and **+20% in 2023**, indicating **better product movement** and **wider customer reach**.
- Profit consistently increased year over year, with the **largest jump of 32.26% in 2022**, reflecting **stronger sales performance and improved cost management**. Growth continued in 2023 with a **14% increase**, showing **stable profit margins**.

### 2. Product Subcategory Comparison:

- The **'Copiers'** product subcategory making more profit for all the years with an avg of 14% profit.
- **"Office Supplies"** showed stagnant growth with declining profit margins (-4.2%).

### 3. Weekly Trends:

- Weeks **40-45** showed sales spikes, **25% above the average weekly sales**.
- Weeks **4, 6, and 10** performed below average.

### 4. Customer KPIs:

- Number of customers increased by **6-8% YoY**.
- Top 10 customers contributed **28% of total profit**.

### 5. Customer Behavior:

- Most loyal regions: **West and Central**, with higher multi-order patterns.

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## Actions Taken Based on Insights

### 1. Sales Strategy Adjustment

- Focused marketing campaigns were launched around underperforming months (e.g., February).
- Promoted profitable subcategories (like Technology) via bundle offers and discounts.

### 2. Product Strategy Optimization

- Re-evaluated low-margin categories like Office Supplies.
- Adjusted pricing strategy and negotiated supplier rates for cost-efficiency.

### 3. Customer Retention Programs

- Introduced loyalty rewards for customers with >3 orders per year.

- Personalized email campaigns targeting one-time customers to increase repeat engagement.

#### **4. Region-wise Sales Enablement**

- Boosted ad spending and local partnerships in underperforming cities.
- Enhanced distribution efficiency in regions with loyal high-order customers.