

## Request

**JIM ... Operations Manager:**

Hi Omar!

I hope you are doing well. We need to improve our **quantity performance reports** and move from static Excel files to **interactive dashboards**.

- Focus on **quantity sold, country, product type, and year-over-year performance**.
- Each business unit handles different products and regions, so **easy filtering** is key.
- Track **Gross Profit % (GP%)** to understand account profitability — a **segmentation or scatter plot** would be useful.
- Compare **YTD vs PYTD** with clear KPIs and visual comparisons.

**Necessary Systems:** Excel (Budget / Historical).

**Other Info:** Focus on YTD vs PYTD, GP% segmentation, and filtering by **country** and **product type**.

---

## User Stories

No	Role	Request / Demand	User Value	Acceptance Criteria
1	Operations Manager	Dashboard overview of quantity sold vs PYTD	Monitor overall performance and track growth	Power BI dashboard with YTD vs PYTD KPIs and charts
2	Regional Manager	Breakdown of quantity by country	Identify regions that under/overperform	Treemap or table showing top/bottom countries
3	Product Manager	Detailed overview of quantity per product type	Track indoor, outdoor, landscape performance	Stacked bar/column with product type filters
4	Finance Manager	Profitability segmentation by GP% & Quantity	Understand profitable accounts	Scatter plot GP% vs Quantity for segmentation

5	Operations Manager	Monitor performance over time (monthly)	Identify trends & seasonality	Monthly chart with YTD vs PYTD lines and bars
---	--------------------	---	-------------------------------	---

---

## Insights

1. **Year-over-Year Performance:**
  - YTD vs PYTD shows **positive growth**.
  - Example: Current S\_YTD at **555.66K** vs 538.61K last year → +17.05K improvement.
2. **Underperforming Countries:**
  - Bottom countries by sales variance: **China (-9.76K), France (-9.36K), Sweden (-6.71K)**.
  - Indicates need for corrective actions: pricing, campaigns, distribution.
3. **Monthly Quantity Evolution:**
  - April (+12K) and May (+5K) → strong gains.
  - July (-7K) and August (-8K) → potential seasonal or operational issues.
4. **Profitability Segmentation:**
  - Most accounts cluster **GP% 30–50%**.
  - A few high-value accounts with low margins → opportunity for margin improvement.
5. **Overall GP%:**
  - Gross Profit margin: **39.62%** → healthy, but low-performing countries could be optimized.