

Request:

Steven ... Operations Manager:

Hi Omar!

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

Essentially, we want to focus on **how much quantity we are selling, where (countries), what product types, and how performance compares year over year.**

Since each business unit handles different product types and regions, it would be beneficial to filter them easily.

We also track **Gross Profit % (GP%)** and want to understand which accounts are profitable, so a segmentation or scatter plot could be useful.

Finally, we usually compare Year-to-Date (YTD) vs Previous Year-to-Date (PYTD), and need clear KPIs and visual comparisons.

Let me know if you need anything else!

// Steven

Business Demand Overview:

- **Reporter:** Steven – Operations Manager
 - **Value of Change:** Visual dashboards for Quantity & Profitability analysis, improved tracking of performance across time, products, and geographies.
 - **Necessary Systems:** Power BI, ERP System (Quantity Data), Excel (Budget / Historical reference)
 - **Other Relevant Info:** Focus on YTD vs PYTD, profitability segmentation (GP%), and filtering by country and product type.
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User Stories

No	As a (role)	I want (request / demand)	So that I (user value)	Acceptance Criteria
1	Operations Manager	A dashboard overview of quantity sold vs PYTD	To monitor overall performance and track growth	A Power BI dashboard with YTD vs PYTD KPIs and charts
2	Regional Manager	A breakdown of quantity performance by country	To identify which regions underperform or overperform	Treemap or table visual showing top/bottom countries
3	Product Manager	A detailed overview of quantity per product type	To follow up on indoor, outdoor, and landscape performance	A stacked bar/column with filters by product type
4	Finance Manager	Profitability segmentation by GP% and Quantity	To understand which accounts are profitable	A scatter plot with GP% vs Quantity for segmentation
5	Operations Manager	Monitor performance over time (month by month)	To identify trends, seasonality, and opportunities	A monthly chart with YTD vs PYTD lines and bars

Insights (based on your dashboard)

1. How well is 2023 performing compared to 2022?

- YTD vs PYTD shows **+17.05K improvement**, with current S_YTD at **555.66K vs 538.61K last year**.
- This indicates a **positive trend** in volume growth.

2. Which countries underperform the most?

- Bottom countries by value variance include **China (-9.76K)**, **France (-9.36K)**, and **Sweden (-6.71K)**.
- This highlights regions where corrective actions are needed (pricing, campaigns, or distribution).

3. How does quantity evolve month by month?

- The waterfall and monthly bar charts show **fluctuations**:
 - Strong gains in **April (+12K)** and **May (+5K)**.
 - Losses in **July (-7K)** and **August (-8K)** suggest seasonal or operational issues.

4. How is profitability segmented?

- The scatter plot indicates **most accounts cluster around GP% between 30%–50%**, but a few high-value accounts with low margins could be eroding profitability.
- This segmentation can guide **account prioritization** and margin improvement strategies.

5. Overall GP%

- The Gross Profit margin stands at **39.62%**, a healthy level, but optimization in low-performing countries could push it higher.