

Request:

**\*\*Steven ... Sales Manager:\*\***

Hi Omar!

I hope you are doing well. We need to improve our **internet sales reports** and want to move from static reports to **visual dashboards**.

Essentially, we want to focus on how much we have **sold of what products**, to **which clients** and how **it has been over time**.

Seeing as each **sales person** works on different products and customers it would be beneficial to be able to **filter them also**.

We measure our numbers against **budget** so I added that in a **spreadsheet** so we can compare our values against performance.

The budget is for 2021 and we usually look **2 years back** in time when we do analysis of sales.

Let me know if you need anything else!

// Steven

#### **Business Demand Overview:**

- Reporter: Steven – Sales Manager
- Value of Change: Visual dashboards and improved Sales reporting or follow up or sales force
- Necessary Systems: Power BI, CRM System
- Other Relevant Info: Budgets have been delivered in Excel for 2021

#### **User Stories:**

No #	As a (role)	I want (request / demand)	So that I (user value)	Acceptance Criteria
1	Sales Manager	To get a dashboard overview of internet sales	Can follow better which customers and products sells the best	A Power BI dashboard which updates data once a day

2	Sales Representative	A detailed overview of Internet Sales per Customers	Can follow up my customers that buys the most and who we can sell more to	A Power BI dashboard which allows me to filter data for each customer
3	Sales Representative	A detailed overview of Internet Sales per Products	Can follow up my Products that sells the most	A Power BI dashboard which allows me to filter data for each Product
4	Sales Manager	A dashboard overview of internet sales	Follow sales over time against budget	A Power Bi dashboard with graphs and KPIs comparing against budget.

### How well are sales aligned with the budget?

Current sales are **16,351,550**, exceeding the budget of **15,300,000** by **1,051,550**. This indicates a **positive performance** against the plan, suggesting the company could maintain or even expand investments in the best-performing products.

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### Which regions are driving sales, and where are growth opportunities?

The maps reveal high sales concentration in certain U.S. cities, while others remain underdeveloped. This pattern indicates potential to **strengthen market presence** in low-performing areas through regional campaigns or supply chain adjustments.

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### How do sales behave over time?

The monthly trend chart helps identify seasonality. Peak months suggest opportunities to prepare inventory and launch campaigns, while low months highlight the need for promotions to stimulate demand.

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**Where is the biggest gap between sales and budget?**

By comparing sales vs. budget month by month, periods with negative variance become visible. These months should be investigated further to determine causes such as seasonality, logistics issues, demand shifts, or competition.

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**Which product-customer combinations are the most profitable?**

Cross-analysis of products and customers reveals which specific products are most popular among top clients. This insight supports **cross-selling strategies** and **personalized offers**, boosting both sales and customer satisfaction.