Project Brief

Super Store Corporation is a distribution firm focusing on three customer segments (Consumer, Corporate and Home Office). In order of reviewing company's discount policy and profit result, the Vice President of Sales would like to investigate if there is any relationship between discounted sales and profit over the last three years data set. The marketing department is also interested in **opportunities for efficiencies** of sales with respect to **how discounts are handled**.

Business case

The project aims to analyze the historical sales and profit trends with various dimensions to identify the opportunities of making more nimble inventory and distribution decisions while anticipating next moves in sales based on trends and respecting/improving the discount policy.

Outcome

Project's outcome is a Tableau presentation featuring stories of sales results, profitability, discount policy of Super Store Corporation over the last three years. The take-aways of this analysis is recommendations about focusing on some particular sale patterns corresponding to theirs specific periods of years.

Who: Stakeholders, Audience, Subject-matter experts and Other

Audience/ Stakholder	Personas Descriptions

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VP of Sales - Marketing	Hanna Abeille is the VP of Sales-Marketing for Super Store Corporation located in Paris (France) that has 1308 employees. Hanna is continually looking for solutions to boost sales via different channels because she is working on a project of expanding Super Store to another country. Hanna is 35 years old and lives in Paris with her family of 3 people. She's outgoing and personable — the type of person who lights up a room. For her work, she is clearly visual-oriented so that she can understand data correlating with numbers. She understands pricing, margins, and discounting impacts Goals: - Always have a big picture of sales result by category, segment regarding to pre-defined sale strategies or goal setting; - She wants to use data-driven reports to spur sales coaching sessions and empower reps to take ownership of sales opportunity pipelines; - Anticipate next moves in sales based on trends according to specific periods of years; Challenges: - Hanna is a good salesperson but not familiar with numbers and stats; - She has very limited face time with her supervisors;
Board members	Active Board Members of Super Store Corporation Age: 40-56 - Gender: Male and Female Education: Different backgrounds and levels of education. Key personas/goals: - Wants quick clear and credible updates; - Wants to ensure financial stability and make the company more efficient; - Wishes to end fraud and abuse of company policy; - Prefers data-driven decision making; Limitation: Very high level of strategy and macro management but do not have much time to deep dive in detail;

What

What data will be used to answer this question? Is the data capable of providing the information you are looking for?

Data Source	Sample Data set in Excel format (Global Superstore.xls)

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Time framing of data	Data set includes sale data so that order dates are specified in 2016, 2017, 2018 and 2019;
Key Data Points	- Sales, Discount, Order date, Profit, Geography - Category and Sub-Category and Segment of the product on sale - Shipping status and Shipping date of the order
Data features to answer predetermined questions	- Aggregation of Sales and discount data; - Relationship between discounted sales and profit; - Correlation of geography and time frame to discount; - Relationship between Customer discount preference (category, sub-category of the products); - Comparison of more or less profitable sales based on profit ratios; - Inventory and distribution decisions based on profitable sales;

What is/are the business question(s) this project will answer?

Question	Purpose
Where and When are discounted products most sold?	- Make more nimble inventory and distribution decisions; - Anticipate next moves in sales based on trends;
Which products are impacted by discounted sales?	- Review discount policy over Category, Sub-Category, Segment of product; - Detect fraud and abuse of company policy;
What is the correlation between profits and discounts over sales?	- Investigate statistically on discounted sales and profit; - Ensure financial stability and make the company more efficient;
How to anticipate next moves in sales based on trends according to specific periods of years?	- Investigate statistically on sales and quantity regarding to the historics of orders; - Identify the potential products sold on pre-defined periods of year (new year, noel, summer break, ...); - Identify the patterns of sales/loss/discounts based on the comparison of results at the same period among observed years;

How

How will your findings ultimately be displayed? Please list any special requirements of the user

Displayed	The deliverable will be displayed in a dynamically interactive driven dashboard.
Key Features	- Filtering facilities to explore data sets in different population; - Drill down charts to answer multiple questions;

Displayed	The deliverable will be displayed in a dynamically interactive driven dashboard.
Other requirements	For Hanna: - Clearly visual-oriented so that she can understand data correlating with numbers - Sylvia is not good at numbers and stats; - The analytics should be rather static/exploratory then actionable (Sylvia needs to turn the many findings by the retail analysts into a sales strategy); - Pre-highlighting the most meaningful in the reporting; - Selecting some example according to the patterns found and Highlighting the percentage of this population; For other board member: Keeping Large fonts (poor eyesight) Other: - The presentation must appear as a very synthetic view and easy to manipulate because Sylvia will have only 5-7 minutes to present to board members; - Starting with the top-level facts because board members don't understand the minutiae of the business and prefer quickly hearing key points; - The visualization will be viewed from a great distance across the room