Power BI Case Study: Financial Performance Analysis

Context

You are part of the finance and strategy team at **Acme Corp**, a mid-sized company operating in multiple regions.
The company wants to understand its financial performance across **products, regions, and sales channels**.

You have access to the **financial sample dataset** in Power BI.

Your task is to create actionable insights that will help management make strategic decisions.

Objectives

- Design a **KPI tree** for financial analysis
- Build a **Power BI dashboard** to track key metrics
- Use your dashboard to answer **critical business questions**
- Challenge yourself with **advanced questions** for deeper insights

Dataset

Financials Table - `Date` — Transaction date
- `Region` — Region of operation
- `Product` — Product name
- `Sales_Channel` — Online, Retail, Wholesale
- `Revenue` — Total revenue
- `Cost` — Total cost
- `COGS` — Cost of Goods Sold
- `Discounts` — Discounts applied
- `Returns` — Returns value
- `Units_Sold` — Quantity sold
- `Profit` — Revenue - Cost - Discounts - Returns

Task 1: KPI Tree Design

Design a KPI tree to organize financial metrics. Start from **high-level KPIs** and drill down to **detailed supporting metrics**.

Exercise:
- Sketch your KPI tree
- Consider how each metric **links to actionable decisions**

Task 2: DQ Assessment & recommendations

Review the Quality of the data based on completeness,accuracy and validity to support critical financial metrics. Note the issues and potential recommendations to address the issue noted.

Exercise:

- Note Down the issues identified
- What are the potential impacts to the insights to be generated.
- Consider how each issue can be addressed as per the governance operating model discussions.

Task 3: Build a Power BI Dashboard

1. Load the dataset into Power BI
2. Create **measures** for Revenue, Cost, Profit, Discounts, Returns, Units Sold, and Margins
3. Use **visuals**:

   - Cards for key totals
   - Bar/Column charts for breakdowns by region, product, and channel
   - Line charts for trends over time
   - Matrix for detailed view by product & region

4. Add **filters/slicers**:

   - Date range
   - Region
   - Product category
   - Sales channel

5. Design your dashboard **intuitively**, following your KPI tree

Task 4: Answer Key Questions

Use your dashboard to answer the following **business questions**:

Core Questions

1. Which region contributes the highest revenue and profit?
2. Which product category has the highest margin?
3. What is the trend of revenue and profit over time?
4. Which sales channel is most profitable?
5. How do discounts and returns impact net profit?

Advanced Questions

1. Identify the most profitable products after adjusting for discounts and returns
2. Calculate profit per unit sold for each region and channel. Which combination is most efficient?
3. Determine month-over-month revenue growth for each product category
4. Analyze profitability by product and region simultaneously
5. Identify potential underperforming products and suggest next steps

Deliverables

- KPI tree diagram (hand-sketched or digital)
- Power BI dashboard file (.pbix)
- Insights report answering all **core** and **advanced questions**

Instructions for Delegates

- Spend **20–30 mins** on KPI tree design
- Spend **60–90 mins** building your dashboard
- Answer **core questions first**, then tackle advanced questions
- Be prepared to **present your insights** to the group