**Experiment 8:** To analyse sales performance data and build a sales funnel using any open source BI tool **(Tableau Public)**

# Title:

To analyse sales performance data and build a sales funnel using Tableau Public.

# Objective:

* To analyse sales performance using Tableau Public.
* To build a sales funnel visualization for tracking customer conversion stages.
* To interpret insights from sales data for decision-making.

# Software/Tools Required:

* Tool: Tableau Public
* Dataset: Sample Superstore Dataset (CSV)
* System: Windows/Linux/Mac with internet access

# Theory Overview:

**Business Intelligence (BI):**

Business Intelligence is a technology-driven process that helps organizations collect, analyze, and present business information to support decision-making. BI tools transform raw transactional data into meaningful insights through reports, dashboards, and interactive visualizations. These insights help businesses identify trends, monitor performance, and make data-driven decisions.

# Sales Performance Analysis:

Sales performance analysis is the process of examining sales data to evaluate the

effectiveness of strategies, sales teams, and customer engagement activities. It includes:

* Measuring key performance indicators (KPIs) like revenue, profit, conversion rates, and customer acquisition costs.
* Identifying top-performing products, regions, or sales representatives.
* Detecting bottlenecks in the sales process that reduce efficiency.
* Comparing actual sales with targets to evaluate goal achievement.

# Sales Funnel in Business:

A sales funnel is a visual representation of the stages customers go through before making a purchase. It typically includes stages such as:

* **Leads/Prospects:** Initial potential customers showing interest.
* **Qualified Leads:** Prospects evaluated and filtered based on buying intent.
* **Opportunities:** Customers who are actively considering a purchase.
* **Closed Deals/Conversions:** Customers who complete the purchase.

This funnel allows businesses to understand where most prospects drop off, enabling them to refine their marketing and sales strategies.

# Tableau Public for Sales Funnel Visualization:

Tableau Public is an open-source BI tool that provides:

* **Easy connectivity to datasets:** CSV, Excel, Google Sheets, or databases.
* **Drag-and-drop interface:** Enables quick visualization creation.
* **Calculated fields:** Allow creation of custom KPIs such as conversion rates.
* **Interactive dashboards:** Combine multiple charts (bar, line, pie, funnel) for comprehensive insights.

When applied to sales performance analysis, Tableau Public helps:

1. Visualize **regional and product-wise sales** using bar charts.
2. Track **sales trends over time** using line charts.
3. Show **profit distribution** across categories with pie charts.
4. Build a **sales funnel chart** that reflects customer conversion at each stage.

Thus, BI tools like Tableau Public make sales analysis highly visual, interactive, and actionable, empowering decision-makers to optimize strategies for growth.

# Procedure (Using Tableau Public):

1. **Install Tableau Public**
   * Download from [https://public.tableau.com](https://public.tableau.com/).
   * Install and sign in with an email ID.

# Download Sample Dataset

* + Use the “Sample Superstore” dataset.
  + Download link: Sample Superstore CSV.

# Connect Data

* + Open Tableau Public → Click on “Text File” → Select SampleSuperstore.csv.

# Data Understanding

* + Tableau displays dataset preview.
  + Important fields: Customer ID, Order Date, Sales, Profit, Category, Region, etc.

# Build Sales Funnel Visualization

* + Create a calculated field for defining funnel stages (e.g., Leads, Qualified, Opportunities, Closed Deals).
  + Drag **Funnel Stage** to Rows and **Sales** to Columns.
  + Change visualization type to **Funnel Chart** (using bar chart → quick table calculation → percent of total).
  + Add filters (Region, Segment, Category) for deeper analysis.

# Additional Analysis

* + Bar Chart → Sales by Category.
  + Line Chart → Sales Trend over Time.
  + Pie Chart → Profit by Region.

# Result/Observation:

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* Sales data was successfully analysed in Tableau Public.
* A sales funnel was created to visualize the conversion journey of customers.
* Trends in category-wise sales, profit, and regional distribution were observed.

# Conclusion:

Students learned to use Tableau Public for analysing sales performance data and creating a sales funnel visualization. This provided insights into customer conversion rates and sales strategies.

# CO & PO Mapping:

* + COs: L2, L3, L4
  + POs: 1, 2, 5, 9

# Faculty In-charge:

Mrs. Anamika Singh