Sales Insights Report – July 2018

🔍 Executive Summary

This project presents a comprehensive analysis of sales data collected across multiple states in India during July 2018. Using Excel, the data was cleaned, transformed, and visualized to uncover key performance insights. The dashboard includes KPIs, trend charts, and filters to support operational decision-making. The project demonstrates proficiency in ETL workflows, KPI logic, and dashboard design using Excel.

📊 Project Objectives

- Clean and prepare raw sales data for analysis
- Design calculated columns for commission and performance flags
- Create a dynamic dashboard with KPIs and visualizations
- Identify top-performing sales reps, products, and regions
- Document the ETL and analytical process for portfolio presentation

🧼 Data Cleaning & Transformation

Source File: Sales raw data 2.xlsx

Steps Taken:

- **Removed Duplicates:** Verified uniqueness of Order ID using Excel's "Remove Duplicates"
- **Commission Format Fix:** Converted scientific notation (e.g., 7.0000000000000007E-2) to decimals
- **Primary Key Validation:** Ensured Order ID was unique and consistent
- **Calculated Columns Added:**
  - Commission Amount = Total Sales × Commission Rate
  - Profit Flag = IF Commission Rate > 0.05 THEN "High Margin" ELSE "Low Margin"
  - Sales Category = Based on Total Sales thresholds
- **Date Formatting:** Standardized all dates to MM/DD/YYYY
- **Validation:** Checked for missing or inconsistent entries in State and Sales Rep

📈 KPI Definitions

Total Sales

Commission Amount

Commission

Total Sales

Total Sales

Commission Rate > 0.05

📊 Dashboard Features

File: Sales Dashboard.xlsx

Design Highlights:

- **KPI Cards:** Total Sales, Commission %, Top Rep, Top State
- **Charts:**
  - Bar Chart: Sales by Item
  - Pie Chart: Sales by State
  - Line Chart: Daily Sales Trend

- **Filters:** Slicers for Date, State, Item, and Sales Rep
- **Table View:** Interactive transaction table with dynamic filtering
- **Formatting:** Consistent fonts, color palette, and layout for clarity

🔍 Key Insights

- **Top Sales Rep:** Mark led in total sales across multiple high-value orders
- **Top State:** Maharashtra generated the highest revenue
- **Best-Selling Item:** Office Chairs contributed the most to total sales
- **High Margin Orders:** Over 60% of orders had commission rates above 5%
- **Sales Trend:** Peaks observed around July 5th, 15th, and 25th

📌 Recommendations

- Focus marketing efforts on high-margin items like Office Chairs and Projectors
- Recognize and incentivize top-performing reps (e.g., Mark, Stacey)
- Expand operations in high-performing states such as Maharashtra and Gujarat
- Monitor commission structures to optimize profitability

📁 Project Files

Sales raw data 2.xlsx

Sales Dashboard.xlsx

Sales_Insights_Report.pdf

Data_Cleaning_Steps.md

KPI_Definitions.md

Dashboard_Design_Notes.md

dashboard_screenshot.png

📚 Conclusion

This Excel dashboard project showcases Darshan's ability to transform raw data into actionable insights using structured ETL methods, calculated KPIs, and polished visualizations. It reflects strong analytical thinking, attention to detail, and a commitment to professional presentation — key traits for an aspiring Operations Analyst.

Would you like me to help you format this into a downloadable PDF or generate a dashboard screenshot for your GitHub folder?

📈 Key Findings

- **Total Sales:** ₹1584466
- **Top Sales Rep:** Mark
- **Top State:** Maharashtra
- **High Margin Orders:** 60% of total
- **Best-Selling Item:** Office Chair

📊 Trends

- Office Chairs and Projectors contributed the most revenue.
- Commission rates varied significantly by product and region.
- Sales peaked mid-month, with notable spikes on July 5th and July 15th.

📌 Recommendations

- Focus on high-margin items like Office Chairs and Projectors.
- Incentivize top-performing reps with bonus structures.
- Expand operations in Maharashtra and Gujarat.

Conclusion

This Excel dashboard project showcases Darshan's ability to transform raw data into actionable insights using structured ETL methods, calculated KPIs, and polished visualizations. It reflects strong analytical thinking, attention to detail, and a commitment to professional presentation — key traits for an Data Analyst.