

Sales Visual dashboards

Business request

Need to improve internet sales reports and move from static reports to visual dashboards.

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 2024 and we usually look 2 years back in time when we do analysis of sales. Let me know if you need anything else.

Steven - Sales Manager.

Business Demand

Users

Sales Department

- **Sales Managers:**
 - Monitor team performance and identify areas for improvement.
 - Compare sales against budgeted targets and historical data.
- **Sales Representatives:**
 - Track personal performance metrics (sales volume, client acquisition).
 - Identify high-performing products and top clients for targeted efforts.
- **Regional Sales Leads:**
 - Analyze regional trends and adjust strategies accordingly.

Marketing Department

- **Product Marketers:**
 - Evaluate product performance to refine marketing strategies.
 - Identify high-demand products for promotional campaigns.
- **Customer Segmentation Analysts:**
 - Segment customers based on purchasing trends and preferences.
 - Develop targeted marketing campaigns to optimize ROI.

Finance Department

- **Financial Analysts:**
 - Cross-verify sales performance with budget projections.

- Prepare financial forecasts using historical sales data trends.
- **Budget Controllers:**
 - Track actual sales versus the allocated budget to manage financial planning.

Operations Department

- **Supply Chain Managers:**
 - Use sales data to align inventory levels with demand patterns.
 - Identify potential stock outs or overstock risks based on sales trends.
- **Logistics Coordinators:**
 - Optimize distribution networks based on regional sales data.

Customer Service Department

- **Account Managers:**
 - Track client purchase patterns to offer personalized service.
 - Identify at-risk customers by analyzing declining purchase trends.
- **Customer Success Teams:**
 - Use data to proactively address client concerns and ensure satisfaction

Research & Development

- **Product Development Teams:**
 - Identify customer preferences and trends for future product design.

- Evaluate underperforming products to determine improvement or discontinuation strategies.

Value of change

Transitioning from static sales reports to dynamic, interactive dashboards will deliver substantial value across multiple dimensions

1. Improved Sales Performance

- **Better Targeting:** Sales managers and representatives can identify high-value customers, top-performing products, and underperforming areas, enabling more effective sales strategies.
- **Quota Achievement:** Real-time visibility into individual and team performance against targets will help sales reps and managers adjust their efforts proactively.
- **Revenue Growth:** By capitalizing on actionable insights, such as cross-selling and upselling opportunities, the organization can drive additional revenue.
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2. Operational Efficiency

- **Time Savings:** Automated dashboards eliminate the need for manual data extraction and analysis, allowing sales teams to focus more on customer engagement and selling.

- **Faster Decision-Making:** Interactive filters and real-time updates enable quicker and more informed decisions.
- **Reduced Errors:** Minimizing reliance on manual reporting reduces the risk of inaccuracies in data interpretation.

3. Cost Management

- **Optimized Marketing Spend:** Understanding product performance and customer preferences can refine marketing efforts, reducing wasted spend on ineffective campaigns.
- **Inventory Cost Reduction:** Improved sales forecasting and trend analysis help align inventory levels with actual demand, minimizing excess stock and stockouts.

4. Enhanced User Experience

- **Empowerment:** Sales teams will have direct access to user-friendly dashboards, reducing dependency on IT or analysts for data insights.
- **Personalized Insights:** Sales representatives and managers can tailor dashboards to focus on metrics that matter most to them.

5. Strategic Agility

- **Proactive Management:** Real-time alerts and trend analysis enable the sales team to address potential issues (e.g., declining customer purchases) before they escalate.
- **Scenario Planning:** Historical trends and forecasts support better planning for seasonal fluctuations and market changes.

6. Customer Satisfaction

- **Better Engagement:** Sales reps can personalize client interactions using detailed customer purchase histories and trends.

- **Retention Improvement:** Early detection of customer purchase declines allows for proactive outreach, improving customer loyalty.

Metrics

Increase in Sales Productivity:

- Reduce time spent on manual reporting by 30%-50%.
- Increase time spent on selling activities by 20%-30%.

Revenue Growth:

- Potential for a 5%-10% increase in sales due to better targeting and product prioritization.

Operational Cost Savings:

- Reduced errors in budgeting and forecasting could save significant administrative overhead.

Customer Retention:

- A 3%-5% improvement in retention can significantly impact long-term revenue growth.

Functional requirements

These requirements ensure the dashboards deliver the necessary capabilities to meet user needs:

1. Interactive Visualizations:

- Dashboards must support interactive charts, graphs, and maps.
- Users must be able to drill down into data by region, salesperson, product, or time period.

2. Data Filtering and Segmentation:

- Allow users to filter data by client, product, sales rep, and time range.
- Enable real-time filtering without significant performance lag.

3. Real-Time Data Updates:

- The system must support real-time or near-real-time updates to display the latest sales data.

4. Budget Integration:

- Include features to compare actual sales against the 2024 budget.
- Display key performance indicators (KPIs) such as budget attainment percentage.

5. Export Capabilities:

- Provide options to export dashboards to PDF, Excel, or CSV formats for offline use.

System requirements

Software Requirements

1. Business Intelligence Tool:

- Examples: Microsoft Power BI
- Features: Interactive visualization, filtering, and real-time data refresh.

2. Database System:

- Relational Databases: Microsoft SQL Server, PostgreSQL, or MySQL.

- Alternative: NoSQL databases like MongoDB for unstructured data.
- 3. **ETL (Extract, Transform, Load) Tools:**
 - Examples: Talend, Informatica, Apache NiFi, or Python-based ETL scripts.
- 4. **Operating System:**
 - Server OS: Windows Server 2019/2022 or Linux (Ubuntu/CentOS).
 - Client OS: Windows 10+, macOS 10.14+, iOS, Android.
- 5. **Integration Frameworks:**
 - APIs for integrating data from CRM, ERP, and other enterprise systems.
 - Examples: REST APIs, GraphQL.

Integration Requirements

1. **Data Sources:**
 - Integration with CRM systems (e.g., Salesforce, HubSpot).
 - ERP systems for financial and budget data.
 - Historical sales data repositories or data warehouses.
2. **Data Pipeline:**
 - Automated data extraction and transformation from source systems.
 - Scheduled data refreshes to ensure dashboards display up-to-date insights.
3. **Third-Party Tools:**
 - Integration with external tools such as email services for notifications or collaboration platforms (e.g., Slack, Microsoft Teams).

User stories

As a [role]	I want to [task]	So that [result]
Sales manager	View a high level summary of total sales performance	I can quickly assess how the team is performing
Sales manager	Compare actual sales figures with budgeted targets	I can identify areas where we are over achieving and underperforming
Sales manager	Visualize sales trends over last two years and current year	I can understand seasonal patterns and plan
Sales manager	Filter sales data by region	I can identify high performing and low performing regions
Sales manager	Filter sales by salesperson	I can evaluate individual contributions and provide targeted coaching
Sales manager	View data by product category	I can identify best sellers and underperforming products
Sales manager	View clients who generate most revenue	I can prioritize key accounts and ensure satisfaction
Sales manager	Export data to excel or pdf	I can manage reports and presentations
Sales manager	Track sales metrics during specific marketing campaigns	I can evaluate the effectiveness of campaigns and adjust strategies

Sales manager	See sales forecasts based on historical data and current trends	I can plan and set realistic goals for the team
Sales manager	Segment sales data by client industry or type	I can tailor sales strategies to meet different client needs
Sales manager	Save specific filters and views	I can quickly access the insights without reapplying filters