FINANCIAL KPI DASHBOARD

DATA ANALYSIS

❖ A Financial KPI Dashboard in Power BI is a visual and interactive reporting solution used to monitor an organization's financial health.

❖ It brings multiple financial metrics together—such as revenue, expenses, profit, and margins—into a single dashboard, allowing decision-makers to quickly understand performance trends and take informed actions.

❖ This project transforms raw data into an interactive dashboard that supports real-time financial decision-making.

OBJECTIVES

❖Track and analyze Business performance With Key Financial indicators.

❖Provide real-time insights for decision makers.

❖Identify trends, variances, and performance gaps.

❖Create interactive visuals for better understanding.

PROBLEM STATEMENT

❖ **Total Sales Analysis:**

Understands Whether the Company is achieving its expected target profit across different regions and product categories.

❖ **Revenu Performance Analysis:**

Evaluate the Total target revenue and identify which regions or sales representatives Contribute the most to revenue generation.

❖ **Operating Expense Analysis:**

Analyze the total operating expenses to identify high-expense product Categories and cost-heavy areas.

❖ **Net Profit Analysis:**

Examine the overall net profit to assess the Company's profitability after deducting operating expenses.

❖ **Region-Wise Financial Analysis:**

Compare revenue, cost of goods sold(COGS) and profit across different regions to identify high-performing and low-performing zones.

❖ **Sales Representative Performance Analysis:**

Evaluate target profit distribution among sales representatives to identify top and underperforming employees.

❖ **COGS Trend Analysis:**

Analyze the monthly trend of cost of goods sold(COGS) to understand seasonal patterns and cost fluctuations.

❖ **Product Category Expense Analysis:**

Assess operating expenses across different product categories to Support effective budgeting and resource allocation.

ANALYSIS DONE FOR

❖ **Sum of Net Profit and Sum of Target Profit by Region:**

Visualizes the comparison between actual net profit and target profit across different regions to identify performance gaps.

❖ **Sum of Target Profit by Sales Rep:**

Shows the contribution of each sales representative toward achieving the company's target profit.

❖ **Sum of Operating Expense by Product Category:**

Displays the operating expenses across different product categories to highlight cost-intensive areas.

❖ **Sum of Revenue and Sum of Cost of Goods Sold by Region:**

Compares revenue and COGS across regions to evaluate regional profitability and cost efficiency.

❖ **Sum of Cost of Goods Sold by Year and Month:**

Visualizes the monthly trend of COGS over time to identify spending patterns and seasonal fluctuations.

❖ **Sum of Target Revenue and Sum of Target Profit by Region:**

Compares target revenue and target profit across regions to assess planned financial performance.

OVERALL PERFORMANCE

❖ Displays the key financial KPIs in a quick, easy-to-read format.

❖ Shows total revenue to understand overall income generated.

❖ Shows total net profit to measure actual business profitability.

❖ Show total target revenue to compare planned vs achieved performance.

❖ Show target profit to evaluate expected profit levels.

❖ Show operating expenses to understand total cost incurred.

❖ Helps users get an immediate snapshot of business performance at a glance.

DASHBOARD VISUALIZATION GALLERY
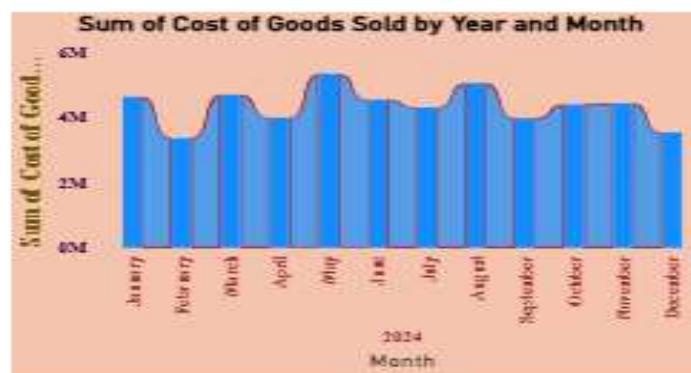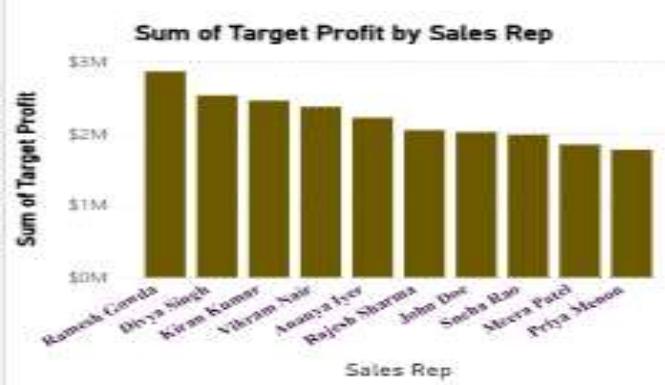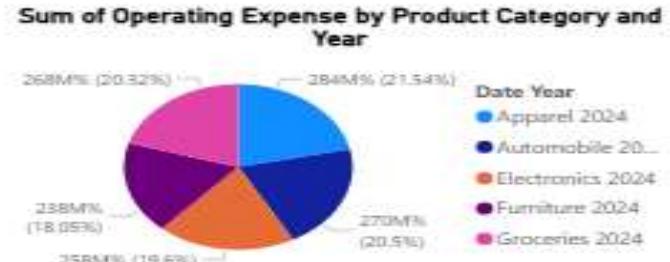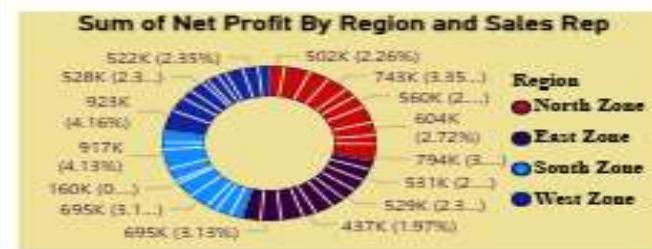
CONCLUSION

In Our Project The Financial KPI Dashboard provides a clear and interactive view of the company's key financial metrics, helping users easily track revenue, profit, expenses, and performance across regions, products, and sales representatives. By visualizing real-time financial data, the dashboard enables quick decision-making, identifies performance gaps, highlights cost-intensive areas, and supports better planning and forecasting. Overall, the dashboard simplifies financial analysis and enhances business efficiency through insightful and user-friendly visualizations.