



KPI Period

YTD

Data Period

7/1/2001

6/30/2004

Sales Channel

All

Territory

All

Subcategory

All

Category

All

Product Price

All

An overview of the main sales and financial KPIs for the period of fiscal years 2002 - 2004

Sales

\$52.75M

▲ 57% YOY

Gross Profit

\$6.15M

▲ 590% YOY

GPM

11.65%

▲ 341% YOY

Orders

23K

▲ 415% YOY

Customers

18K

▲ 399% YOY

AOV

\$2.29K

▼ -70% YOY

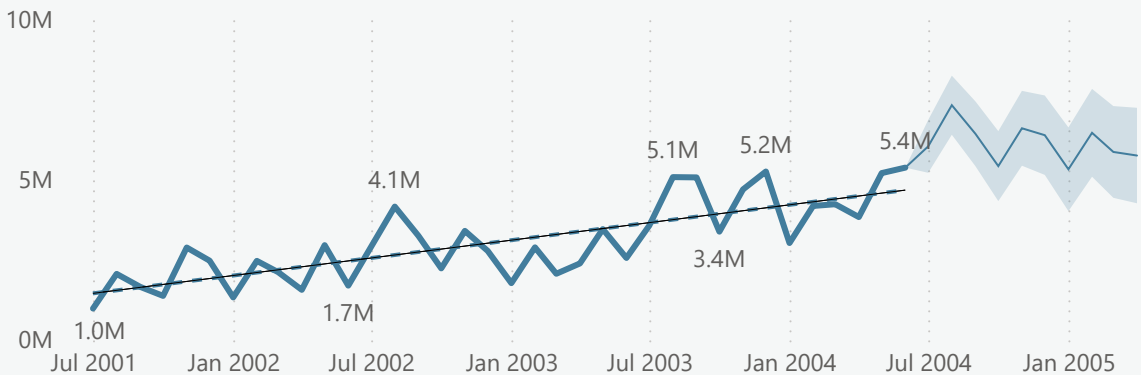
Main KPIs

Territory

Product

Staff and Clients

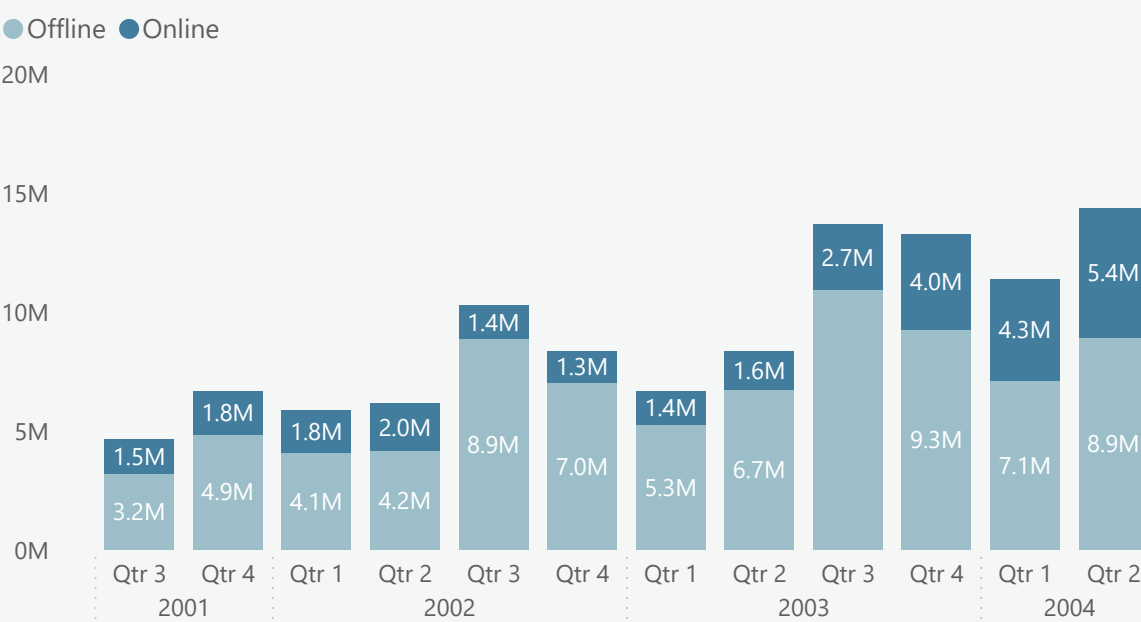
Sales in USD by Month



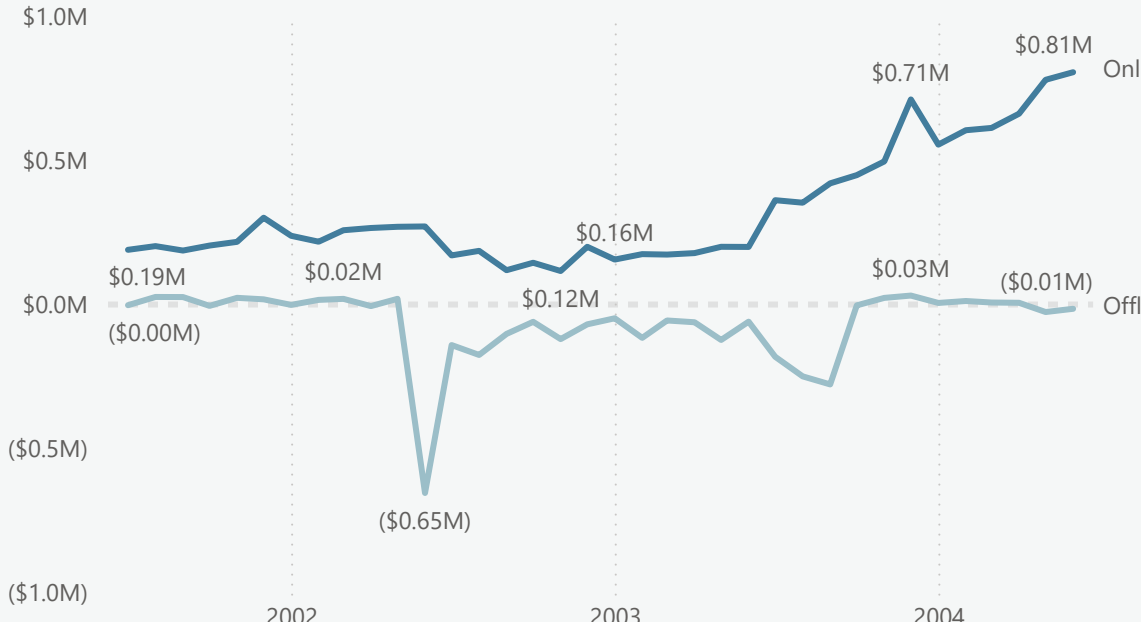
Gross Profit in USD by Month



Sales in USD by Sales Channel



Gross Profit in USD by Sales Channel





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An overview of the main KPIs by territory

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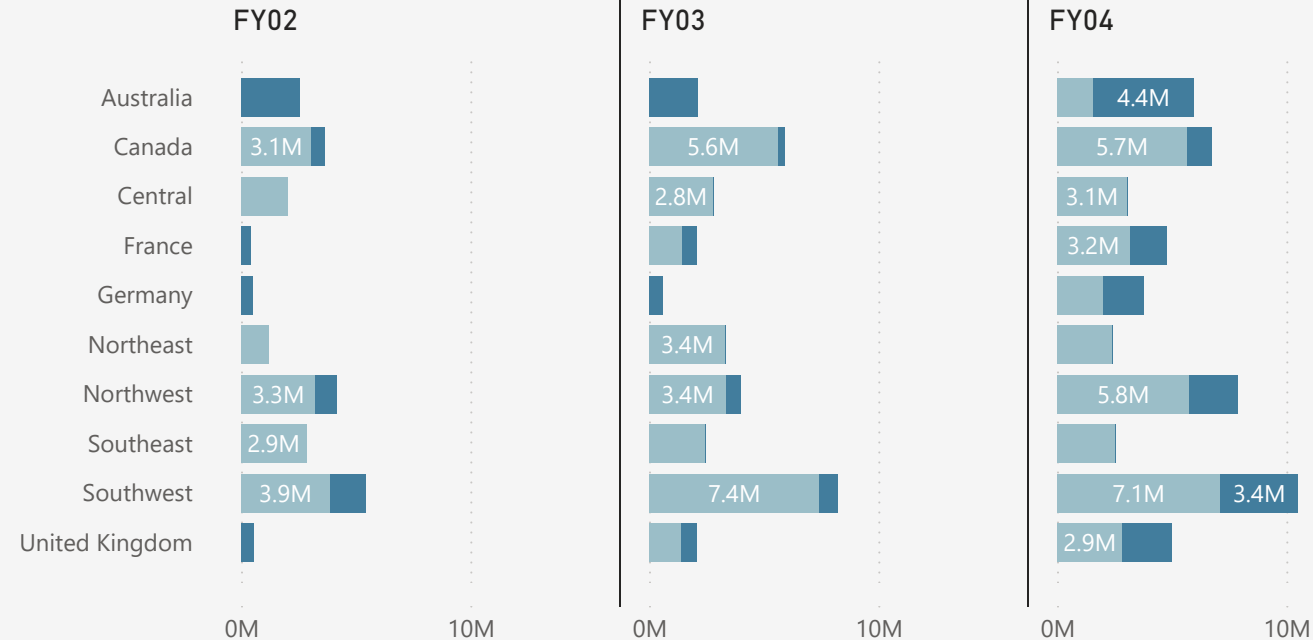
Territory

Product

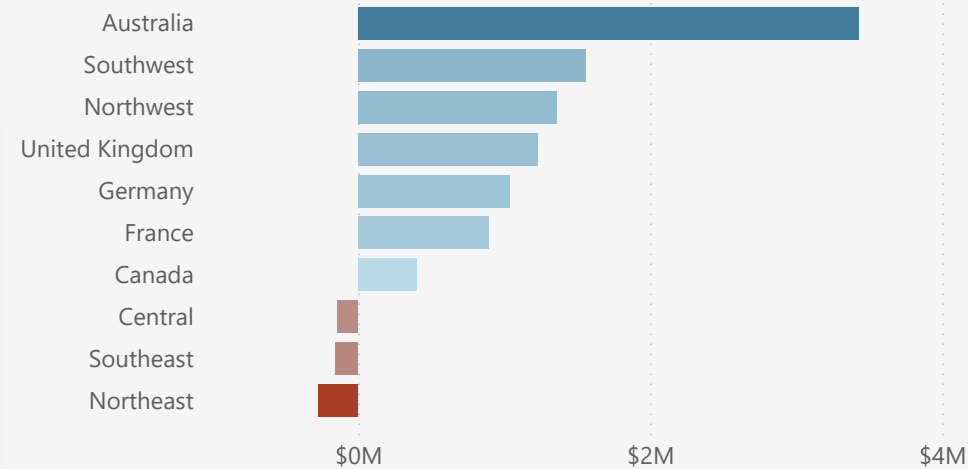
Staff and Clients

Sales in USD by Territory, Channel and Fiscal Year

● Offline ● Online

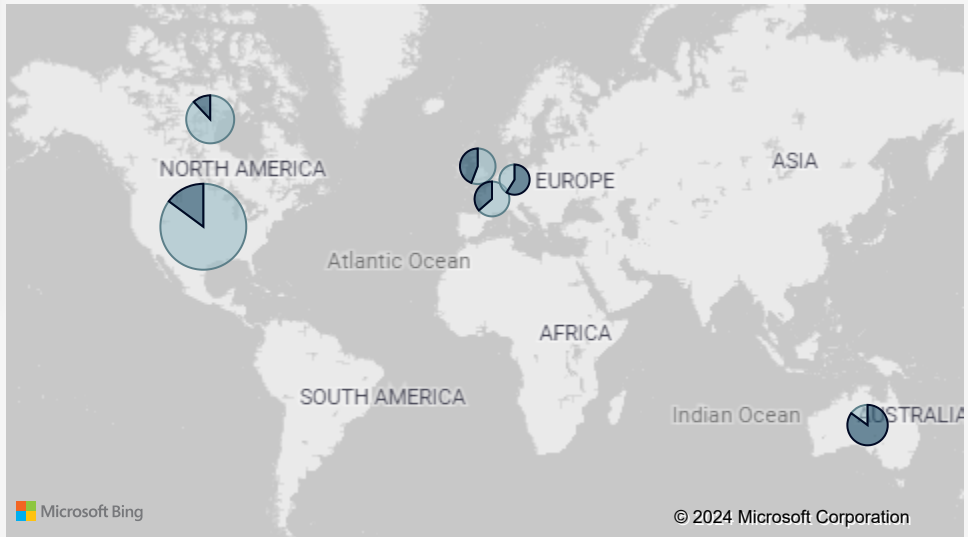


Gross Profit in USD by Territory



Sales in USD by Country and Sales Channel

● Offline ● Online





KPI Period

YTD

Data Period

7/1/2001

6/30/2004

Sales Channel

All

Territory

All

Subcategory

All

Category

All

Product Price

All

An overview of Products, Subcategories, Categories, Price Levels and Reasons to Buy

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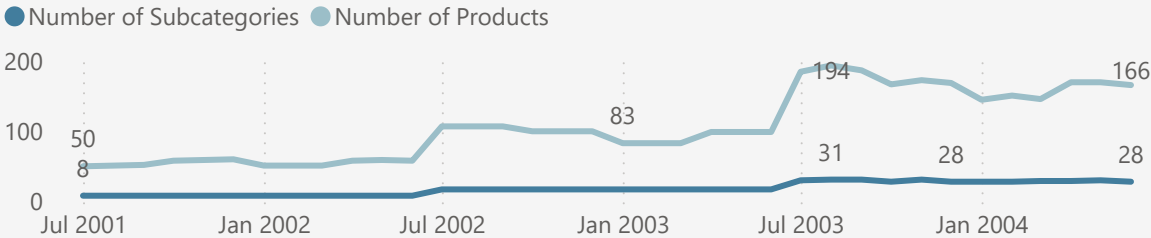
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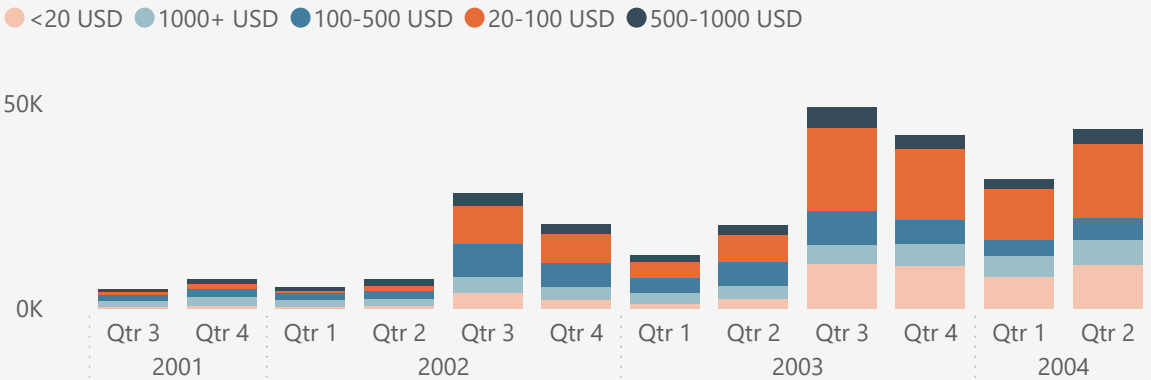
Number of Products and Subcategories



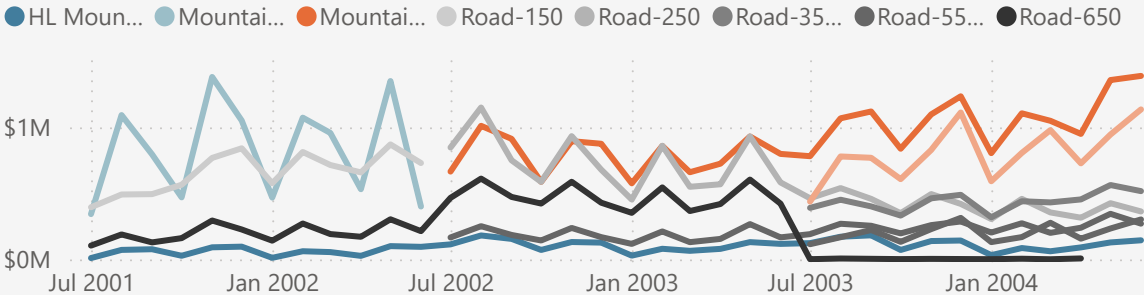
Sales, Orders and Gross Profit by Products

Category	TotalSales	TotalOrders	GrossProfit	GPM
[-] Bikes	\$94,651,172.70	18,368	\$7,936,394	8.3
[+] Road Bikes	\$43,909,437.51	9,538	\$2,811,074	6.4
[-] Mountain Bikes	\$36,445,443.94	6,185	\$4,908,042	13.4
Mountain-200 Black, 38	\$4,400,592.80	1,252	\$673,444	15.3
Mountain-200 Black, 42	\$4,009,494.76	1,177	\$674,217	16.8
Total	\$109,795,540.77	30,489	\$9,343,538	8.5

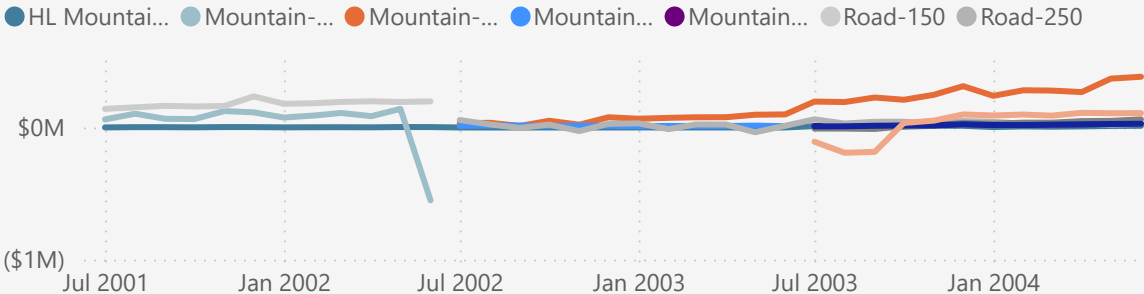
Items Sold by Price Level



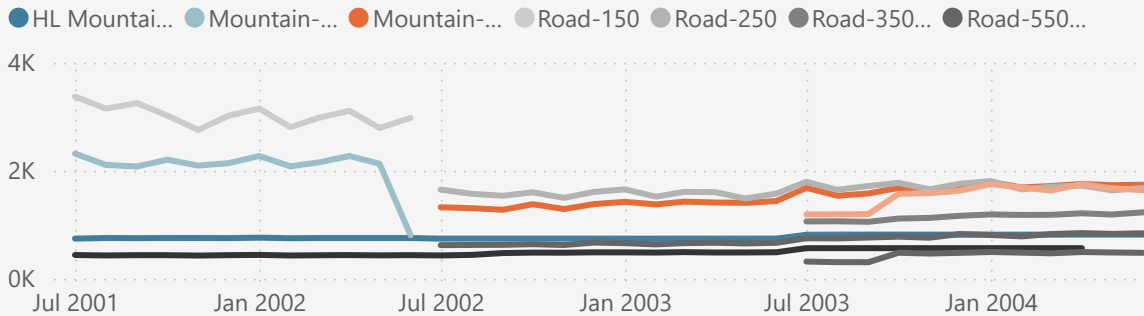
Total Sales in USD by Product Model (Top 10 Sales)



Gross Profit in USD by Product Model (Top 10 GP)



Average Unit Price after Discount in USD by Product Model (Top 10 Sa...)





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Sales by Employees, Orders by Customer Stage, Average Order Value. Authorized use only - employee names provided.

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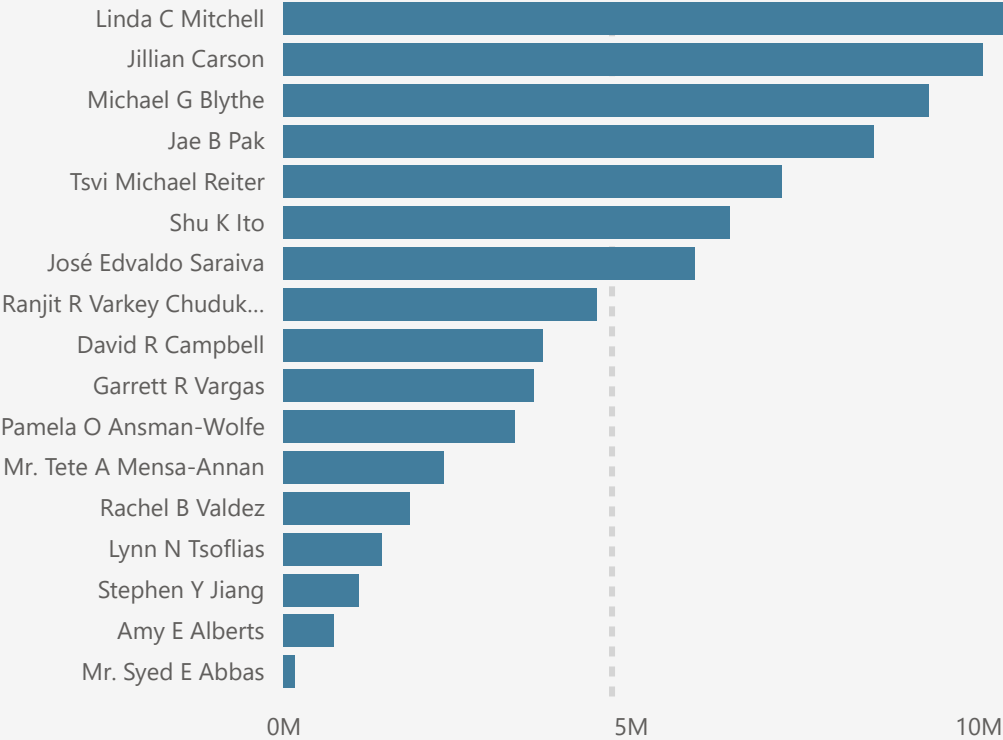
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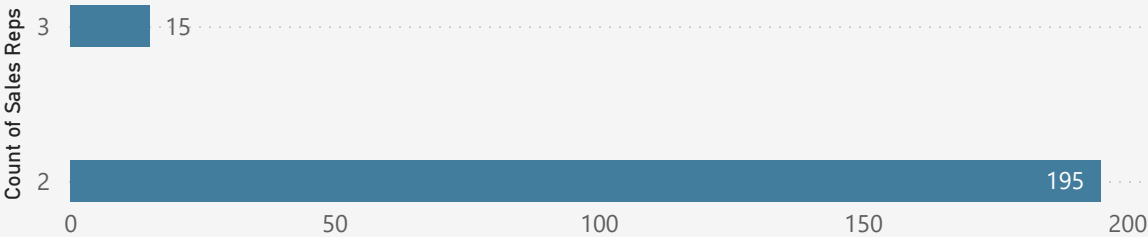
Product

Staff and Clients

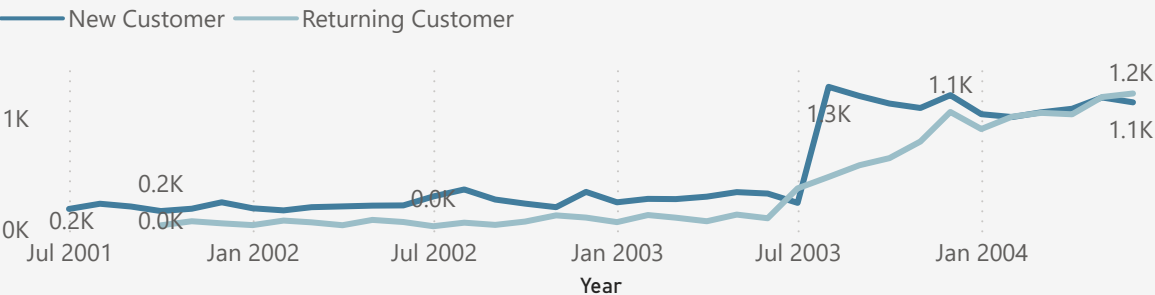
Sales Representatives by Sales in USD



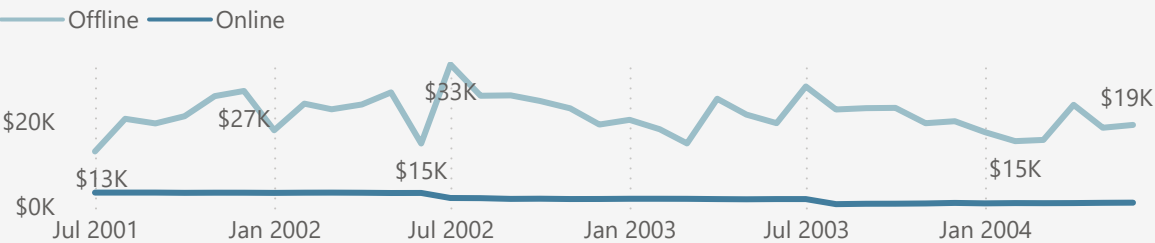
Count of Customers with Multiple Sales Reps



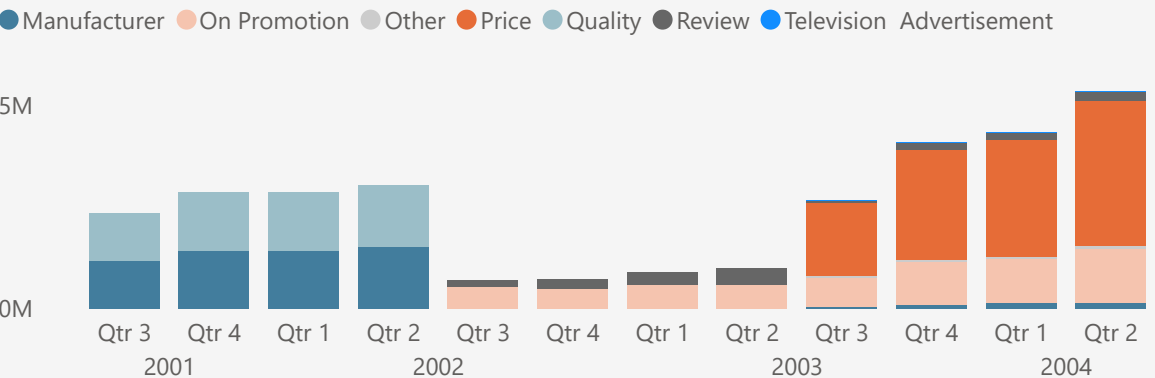
Orders by New vs. Returning Customer



Average Order Value by Sales Channel



Sales in USD by Reason (Online Only)



## Key Findings & Recommendations

### Sales Growth

- Sales increased from **23.4M USD in FY02** to **52.8M USD in FY04** (57% YOY growth).
- Gross profit grew from **2.3M USD in FY02** to **6.15M USD in FY04** (590% YOY growth).

### Assortment Expansion & Pricing Strategy

- In **FY02**, the company offered **50-60 SKUs** across 8 subcategories, with an average item price of **969 USD** and an average bike price of **1,446 USD**.
- By **FY04**, the range expanded to **~150 SKUs** across 30 subcategories, with the average item price dropping to **317 USD** and the average bike price to **1,010 USD**.

### Top Gross Profit Generating Products

- **Mountain-200** (launched July 2002) and **Touring-1000** (launched July 2003) are currently the top sellers, each priced around **2,000 USD**.

### Opportunities for Growth

#### 1. Expand Product Lines

Consider broadening the range of bikes and accessories to capitalize on the growing markets for:

- **BMX Bikes**
  - Sales 2003: North America ~1.2M units, Western Europe ~1.4M units, Australia ~0.3M units.
  - Forecast: 2-3% annual growth.
- **Hybrid Bikes**
  - Sales 2003: North America ~1.8M units, Western Europe ~2.7M units, Australia ~0.35M units.
  - Forecast: 4-7% annual growth.
- **Urban Bikes**
  - Sales 2003: North America ~1.1M units, Western Europe ~2.6M units, Australia ~0.45M units.
  - Forecast: 5-7% annual growth.

*Sources: Bicycle Retailer and Industry News (BRAIN), National Bicycle Dealers Association (NBDA), European Cycling Federation (ECF), Cycling Promotion Fund (Australia), Statista, MarketResearch.com*

#### 2. Increase Online Presence

- Sales were **16.5M USD in Online** vs **36M USD in Offline** in FY04. Online sales grew **186% YOY**, while Offline grew **30% YOY**. Gross profit for Online was **6.8M USD**, while Offline suffered a loss of **(0.7M USD)**.
- Currently, only **17 out of 28 subcategories** and **102 out of 151 products** are available online. Expanding online offerings could significantly boost revenue.
- Launch marketing campaigns in regions with **null online sales** (Central USA, Northeast USA, Southeast USA) to tap into these markets.

#### 3. Optimize Sales Representative Allocation

- Offline operations reveal inefficiencies: **15 customers** are managed by **3 sales reps**, and **195 customers** are managed by **2 sales reps**. Assigning one sales rep per customer can eliminate internal competition and redundant discounts while freeing up time for additional customer outreach.

## General Information

### Dataset

[AdventureWorks Database](#) is a Microsoft sample database that contains data from a fictitious manufacturing company called Adventure Works Cycles.

### Prepared by

Greta Šaumanė, July 2024

### Goal

To create a dashboard for use by Executives and Sales, providing key performance indicators (KPIs) and detailed insights to identify challenges and opportunities.

### Important Notes

- Fiscal year runs from July to June.
- Due to discrepancies in income data across different tables, the LineTotal from the OrderDetail table is used, as it correlates directly with UnitPrice.

User Guide

Navigation

- Use the **left menu buttons** or **tabs** to navigate between different sections of the report.
- In the **published version**, you can switch between tabs (pages) to view different parts of the report.
- In the **development environment** (Power BI Desktop), the same tabs will be accessible.

Filtering and Slicing

- Use the **top slicer panel** to apply filters across the report.
- **Interactive Filtering:** You can also filter data by selecting specific lines, bars, or labels within the charts. This will automatically update other visuals to reflect the selected data points.

KPI Period and Data Period Slicers: Key Considerations

- **KPI Period Slicer:** This slicer is designed to control the KPI boxes only.
- **Data Period Slicer:** Affects all graphs and KPI boxes, controlling the date range for the report’s visuals.

KPI and Data Period Interaction

- **KPI Boxes** display the corresponding KPI values for the most recent selected **KPI period**, based on the date range chosen in the **Data Period slicer**.
- When the selected **Data Period** is shorter than the chosen **KPI Period**, the KPI boxes will display data for the full KPI period **up to the end date** of the Data Period slicer (ignoring the start date).

Examples:

Scenario 1:

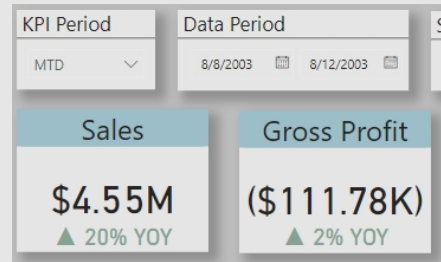
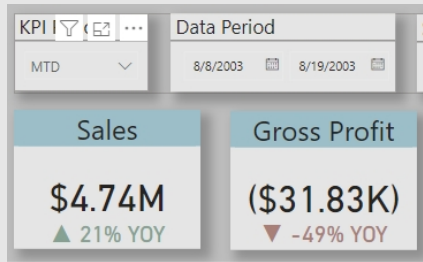
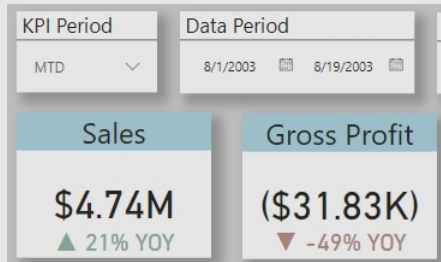
- KPI Period: **MTD (Month-to-Date)**
- Data Period: **8/1/2003 – 9/19/2003**
- **Result:** KPI boxes will display data for the full current month (8/2003), covering the days up until the selected end date (9/19/2003).

Scenario 2:

- If the **Data Period start date** changes to **8/8/2003**, the KPI data will remain the same for the entire KPI period (August 2003), disregarding the changed start date of 8/8/2003.

Scenario 3:

- If the **Data Period end date** changes to **8/12/2003**, the KPI boxes will update to display data only up to the new end date (8/12/2003), reflecting a shorter period within the selected KPI period.



**Reminder:** The fiscal year runs from **July 1** to **June 30**.

Access

- **Sales Managers** are entitled to access and view their respective sales figures.
- Some charts may appear incomplete due to missing data from other areas, but all relevant data for the Sales Manager’s figures is displayed accurately.