

Terra Coffee Co.

Business Performance & Marketing Insights

2019-2022 Business Performance

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Overview

Context

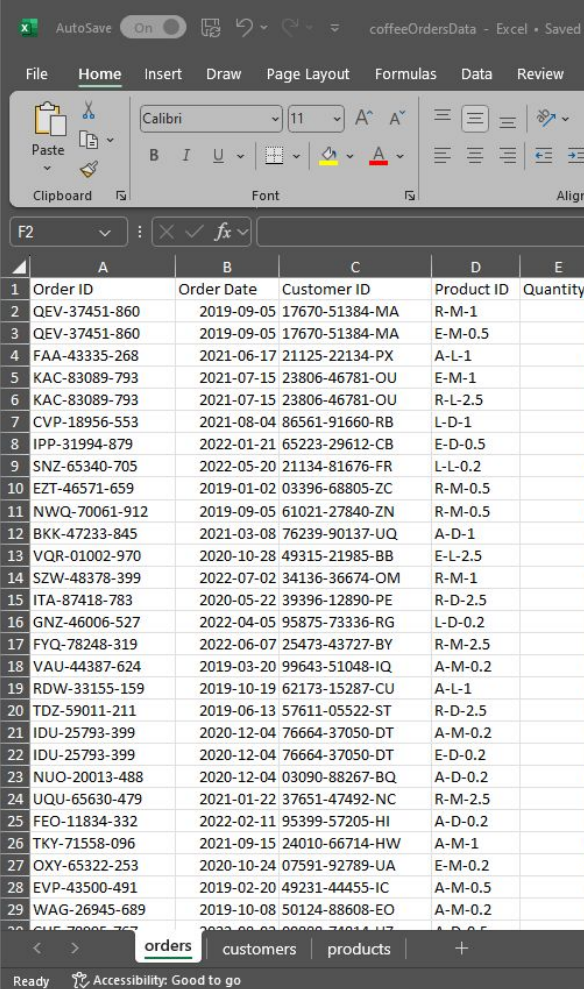
This project aims to optimize Terra Coffee Co.'s **product offerings**, **marketing strategies**, and **customer retention** efforts by **leveraging sales data insights to increase revenue** across key markets, improve customer satisfaction, and drive larger purchases through targeted campaigns and personalized offers.

The requirements for this project are as follows: Create a **dashboard within Excel** which displays total sales over time, sales by country, and sales by top customers and ensure that there are **filters/slicers** for roast type, package size, and loyalty members as well as a **timeline** slicer.

Data Source

Data Source

- The dataset consisted of a single .csv file containing three tables:
- The orders table held order details, including order ID, date, and basic customer information
- The customer table stored customer data, such as customer ID, name, and contact details.
- The products table included information on the coffee products, such as product ID, size, roast type, and price



AutoSave On coffeeOrdersData - Excel - Saved

File Home Insert Draw Page Layout Formulas Data Review

Clipboard Font Align

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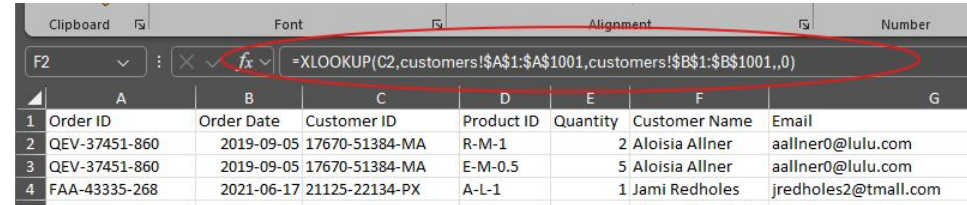
	A	B	C	D	E
1	Order ID	Order Date	Customer ID	Product ID	Quantity
2	QEV-37451-860	2019-09-05	17670-51384-MA	R-M-1	
3	QEV-37451-860	2019-09-05	17670-51384-MA	E-M-0.5	
4	FAA-43335-268	2021-06-17	21125-22134-PX	A-L-1	
5	KAC-83089-793	2021-07-15	23806-46781-OU	E-M-1	
6	KAC-83089-793	2021-07-15	23806-46781-OU	R-L-2.5	
7	CVP-18956-553	2021-08-04	86561-91660-RB	L-D-1	
8	IPP-31994-879	2022-01-21	65223-29612-CB	E-D-0.5	
9	SNZ-65340-705	2022-05-20	21134-81676-FR	L-L-0.2	
10	EZT-46571-659	2019-01-02	03396-68805-ZC	R-M-0.5	
11	NWQ-70061-912	2019-09-05	61021-27840-ZN	R-M-0.5	
12	BKK-47233-845	2021-03-08	76239-90137-UQ	A-D-1	
13	VQR-01002-970	2020-10-28	49315-21985-BB	E-L-2.5	
14	SZW-48378-399	2022-07-02	34136-36674-OM	R-M-1	
15	ITA-87418-783	2020-05-22	39396-12890-PE	R-D-2.5	
16	GNZ-46006-527	2022-04-05	95875-73336-RG	L-D-0.2	
17	FYQ-78248-319	2022-06-07	25473-43727-BY	R-M-2.5	
18	VAU-44387-624	2019-03-20	99643-51048-IQ	A-M-0.2	
19	RDW-33155-159	2019-10-19	62173-15287-CU	A-L-1	
20	TDZ-59011-211	2019-06-13	57611-05522-ST	R-D-2.5	
21	IDU-25793-399	2020-12-04	76664-37050-DT	A-M-0.2	
22	IDU-25793-399	2020-12-04	76664-37050-DT	E-D-0.2	
23	NUO-20013-488	2020-12-04	03090-88267-BQ	A-D-0.2	
24	UQU-65630-479	2021-01-22	37651-47492-NC	R-M-2.5	
25	FEO-11834-332	2022-02-11	95399-57205-HI	A-D-0.2	
26	TKY-71558-096	2021-09-15	24010-66714-HW	A-M-1	
27	OXY-65322-253	2020-10-24	07591-92789-UA	E-M-0.2	
28	EVP-43500-491	2019-02-20	49231-44455-IC	A-M-0.5	
29	WAG-26945-689	2019-10-08	50124-88608-EO	A-M-0.2	

orders customers products +

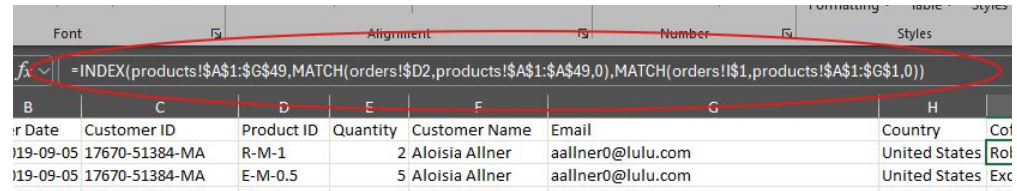
Ready Accessibility: Good to go

Data Cleaning and Preparation

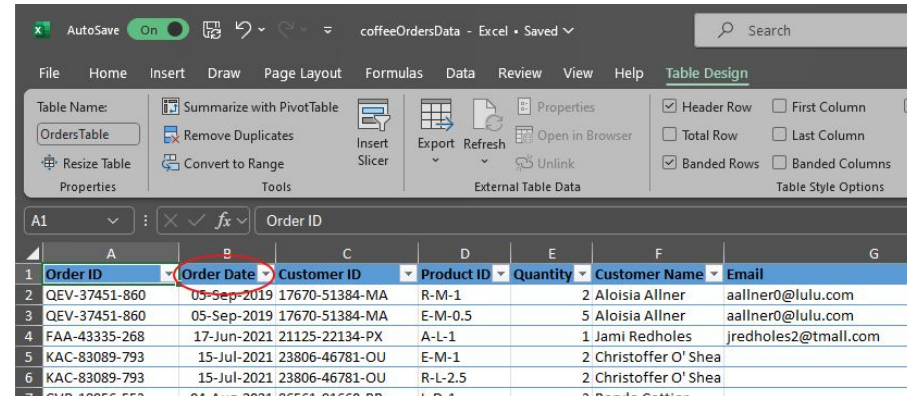
- Several columns in the orders table, including customer name, coffee type, size, and unit price, were missing data.
- To address this, XLOOKUP and INDEX functions were used to match and fill in the missing values from other tables.
- Once the data was complete, the date and size columns were reformatted, and the orders table was converted into a pivot table for easier visualization and analysis.



	A	B	C	D	E	F	G
1	Order ID	Order Date	Customer ID	Product ID	Quantity	Customer Name	Email
2	QEV-37451-860	2019-09-05	17670-51384-MA	R-M-1	2	Aloisia Allner	aallner0@lulu.com
3	QEV-37451-860	2019-09-05	17670-51384-MA	E-M-0.5	5	Aloisia Allner	aallner0@lulu.com
4	FAA-43335-268	2021-06-17	21125-22134-PX	A-L-1	1	Jami Redholes	jredholes2@tmall.com



	B	C	D	E	F	G	H	I
1	Order Date	Customer ID	Product ID	Quantity	Customer Name	Email	Country	Role
2	19-09-05	17670-51384-MA	R-M-1	2	Aloisia Allner	aallner0@lulu.com	United States	Col
3	19-09-05	17670-51384-MA	E-M-0.5	5	Aloisia Allner	aallner0@lulu.com	United States	Exc



	A	B	C	D	E	F	G
1	Order ID	Order Date	Customer ID	Product ID	Quantity	Customer Name	Email
2	QEV-37451-860	05-Sep-2019	17670-51384-MA	R-M-1	2	Aloisia Allner	aallner0@lulu.com
3	QEV-37451-860	05-Sep-2019	17670-51384-MA	E-M-0.5	5	Aloisia Allner	aallner0@lulu.com
4	FAA-43335-268	17-Jun-2021	21125-22134-PX	A-L-1	1	Jami Redholes	jredholes2@tmall.com
5	KAC-83089-793	15-Jul-2021	23806-46781-OU	E-M-1	2	Christoffer O' Shea	
6	KAC-83089-793	15-Jul-2021	23806-46781-OU	R-L-2.5	2	Christoffer O' Shea	
7	CUP-18856-553	04-Aug-2021	95561-81660-PB	L-D-1	3	Benda Cottier	

Insights Deep-Dive

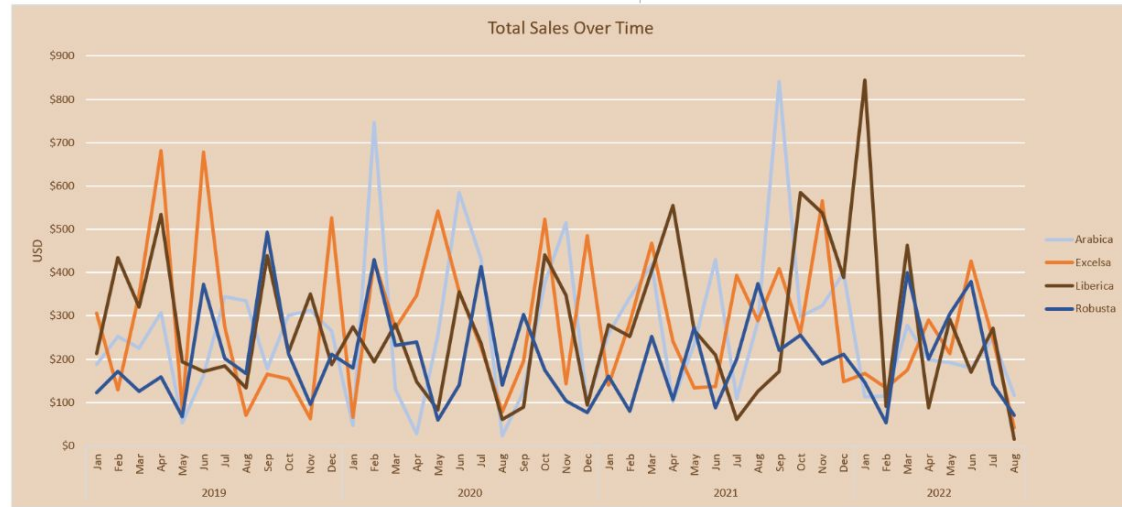
Sales trends by coffee bean type (Arabica, Liberica, Robusta, Excelsa) over time

Arabica shows **more consistent sales**, peaking during the middle of each year.

Excelsa and Liberica have **higher volatility**, with sharp peaks and dips.

Sales for Robusta appear more stable but have **fewer spikes in revenue**.

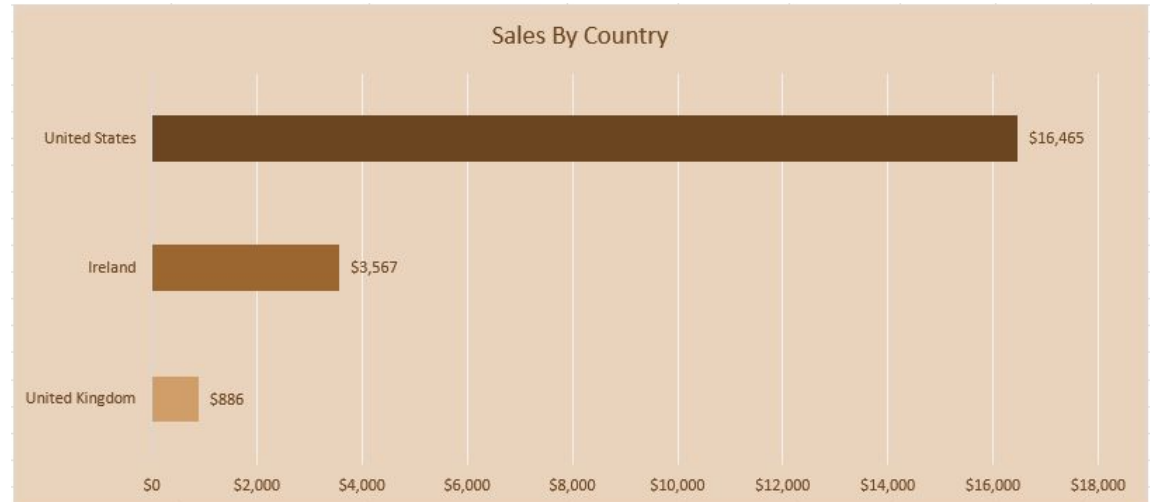
Peak sales months are generally observed in the **middle of the year (summer)**, with fluctuations during other periods.



Geographic sales distribution by country

The majority of sales come from the **United States**, far outpacing other countries (\$35.6k), Ireland follows at \$6.6k, and the United Kingdom contributes the least at \$2.7k.

This suggests a **strong presence in the U.S. market**, with room for growth in international markets.

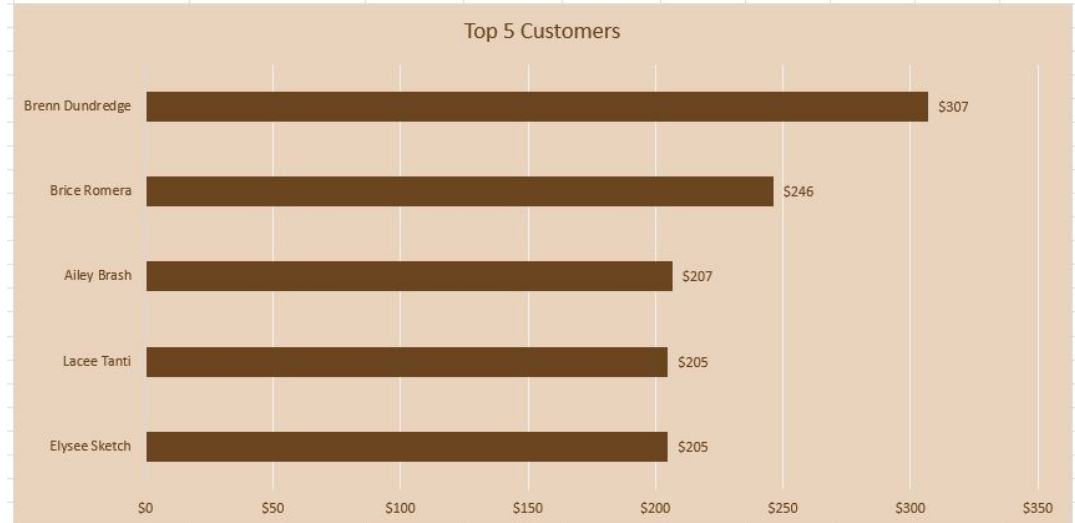


Customer-driven performance with a focus on top 5 customers

The top customer, **Allis Wilmore**, contributed **\$317**, with other top customers contributing between **\$278** and **\$307**.

Customer sales are relatively close in value, suggesting the **top customers are spread out** in their purchases.

This indicates the potential for a loyalty program or marketing strategy to **encourage repeat purchases** from high-value customers.



Filtering by roast type, size, and loyalty program participation

Roast preferences vary significantly across countries, suggesting the need for region-specific marketing strategies (light roast for the U.S. market, dark roast for the Irish market, medium roast for the U.K. market)

There is a clear trend that larger package sizes drive higher sales, making it worthwhile to promote larger sizes to increase revenue in all regions and among key customers.

The United States is the strongest market for both loyalty and non-loyalty members, but non-loyalty members contribute more to overall sales.

Loyalty members contribute to more stable sales over time, while non-loyalty members drive larger but less frequent purchases.

Ireland shows a slightly stronger response from loyalty members, suggesting a potential growth opportunity in this market.

Recommendations

Key Recommendations

Tailor Marketing and Product Offerings by Region

- Develop region-specific campaigns (e.g., special promotions, influencer marketing, localized ads) that highlight the most popular roast in each country.

Promote Larger Package Sizes to Boost Sales

- Expand the range of larger package options and make them more prominent in both online and in-store displays.
- Highlight savings or value-added offers for larger sizes to push customers toward higher-volume purchases.

Strengthen Loyalty Program

- Strengthen the loyalty program to increase membership revenue and boost sales by introducing exclusive benefits for members, such as:
 - Early access to new roasts or limited editions.
 - Tiered rewards for more frequent or high-volume purchases.
 - Personalized offers based on purchase history (e.g., discounts on their favorite roast or size).

Conclusion: By focusing on regional preferences, promoting larger sizes, and optimizing the loyalty program, Terra Coffee Co. can continue to grow sales and better meet customer needs. Leveraging these data-driven insights will help create more personalized marketing efforts, boost customer retention, and expand the company's reach in underperforming markets.

Appendix

Technical Process

Dataset stats:

- Orders tab has 1000 unique rows
- Customers tab has 1000 unique rows
- Products tab has 48 unique rows
- Data ranges from **2019 to 2022**

The analysis used a orders table with the following key dimensions:

- **Coffee Type:** arabica, excelsa, liberica, robusta
- **Roast Type:** light, medium, dark
- **Country:** United States, Ireland, United Kingdom
- **Product ID**
- **Customer ID**

The technical process included:

- Cleaning and preparing the data in **Excel**
- Calculating metrics and extracting insights in **Excel**
- Building a self-service dashboard for visualization in **Excel**

Thank you!