

AtliQ Technologies – Sales Insights 360 Project



“Unlocking the power of data to derive meaningful sales insights”



AtliQ Technologies – Sales Insights 360 Project

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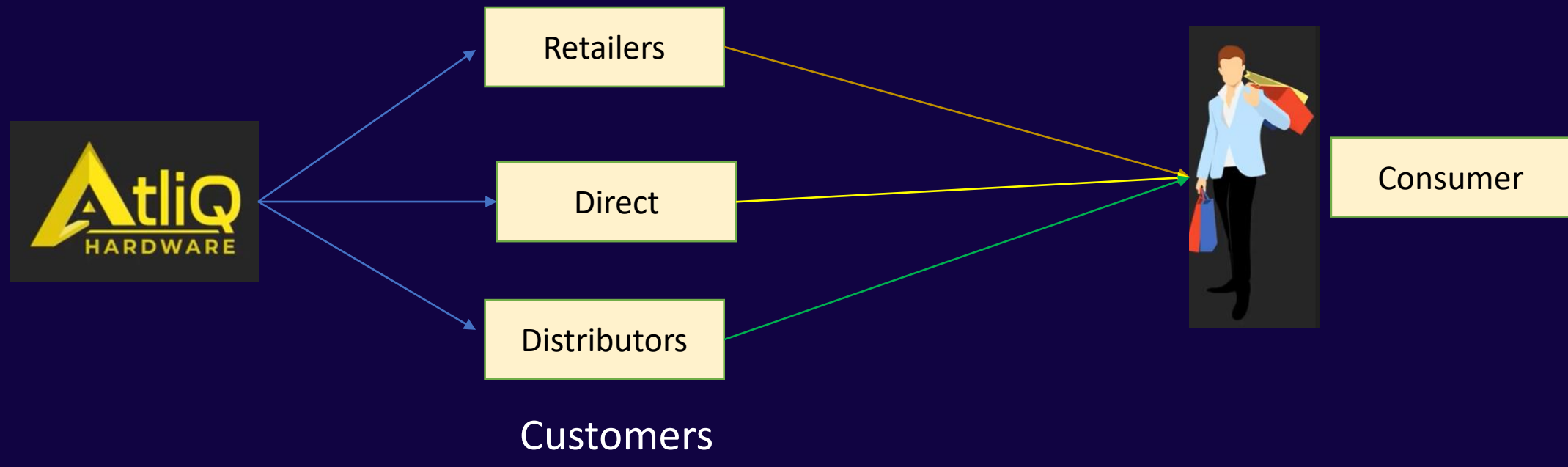
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- *About AtliQ Technologies*

AtliQ Technologies is a global manufacturer and supplier of electronic hardware items such as keyboards mouse, printers, etc.

- *Business Model*





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Problem Statement

- *AtliQ Technologies is a global manufacturer experiencing rapid growth across various markets, segments, channels, divisions, and products.*
- *The product owner of AtliQ Technologies aims to analyze overall business performance and trends, supporting teams such as finance, sales, marketing, supply chain, and executives in strategic decision-making.*
- *To accomplish this, the product owner has assigned the task to the data analytics team, including Mr. Tony Sharma and Mr. Peter Pandey, to develop a comprehensive dashboard in Power BI.*

Expectations from this

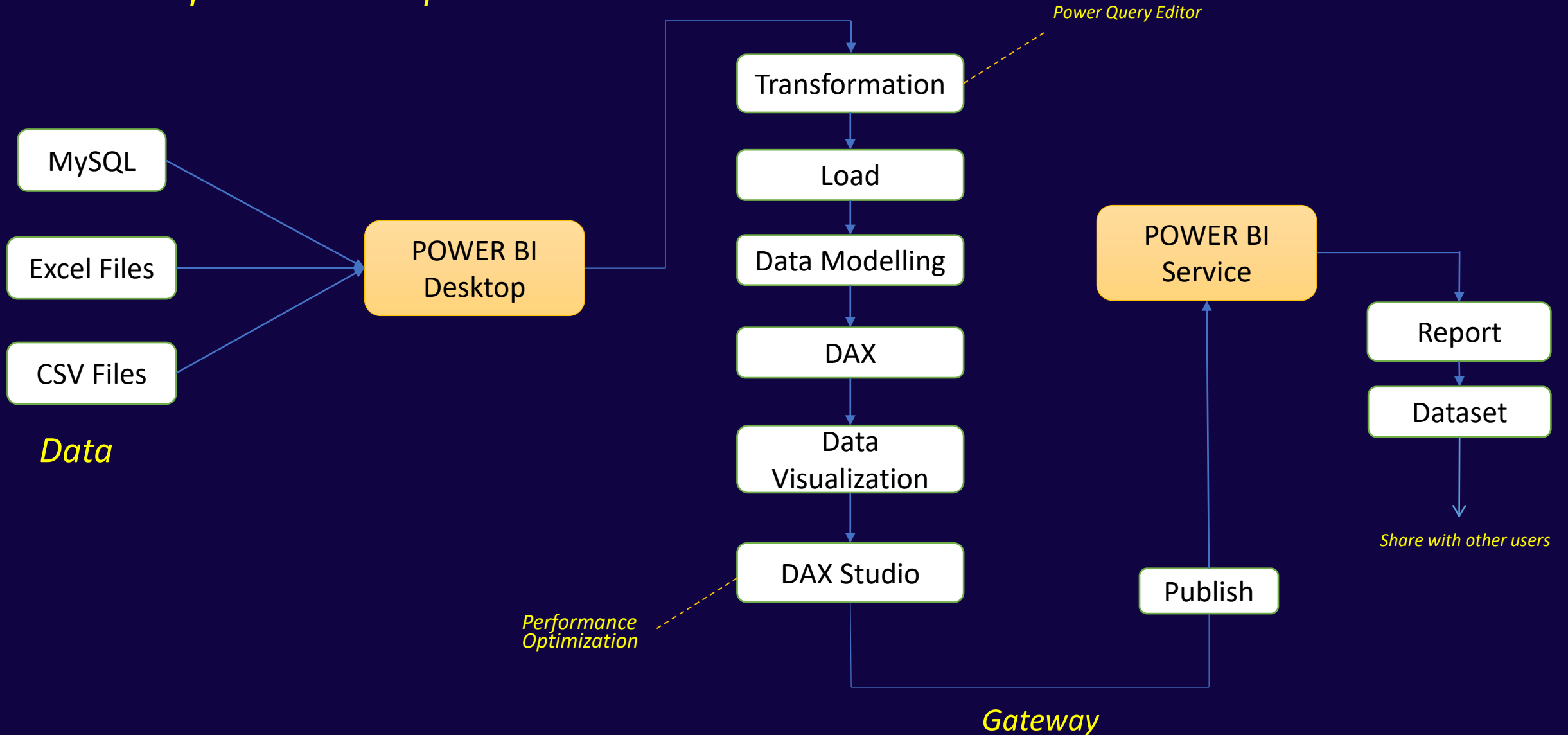
- *Ultimately this dashboard for the individual team will help them to make the strategic decision making by looking into the story (data).*
- *It will tell a story about the sales insights of AtliQ technologies over the period and understanding the fundamental KPI parameters like Net sales, Profit, Gross Margin, Pre-deduction amount, post-deduction amount, target, etc.*
- *It will help to know the performance of different products over different segments, channels, divisions, and markets and help to identify the loopholes.*

Approach

- *Once the requirements are gathered from the product owner, we then aim to first get the data from the data engineering team.*
- *Then understanding the data from domain perspective and doing the necessary transformations.*
- *Once data is ready, we have a mockup or wireframe of the sales view and then approve it from the product owner and also give the timelines for the same.*
- *Once we built the sales view – we have asked the benchmark data from product owner to validate against our data.*
- *Once the data is validated then we aim to go for different views and work on it, parallelly getting the suggestions, and inputs from the stakeholders.*
- *Parallelly we are attending the stakeholders meeting to ask the suggestions from different team owners.*

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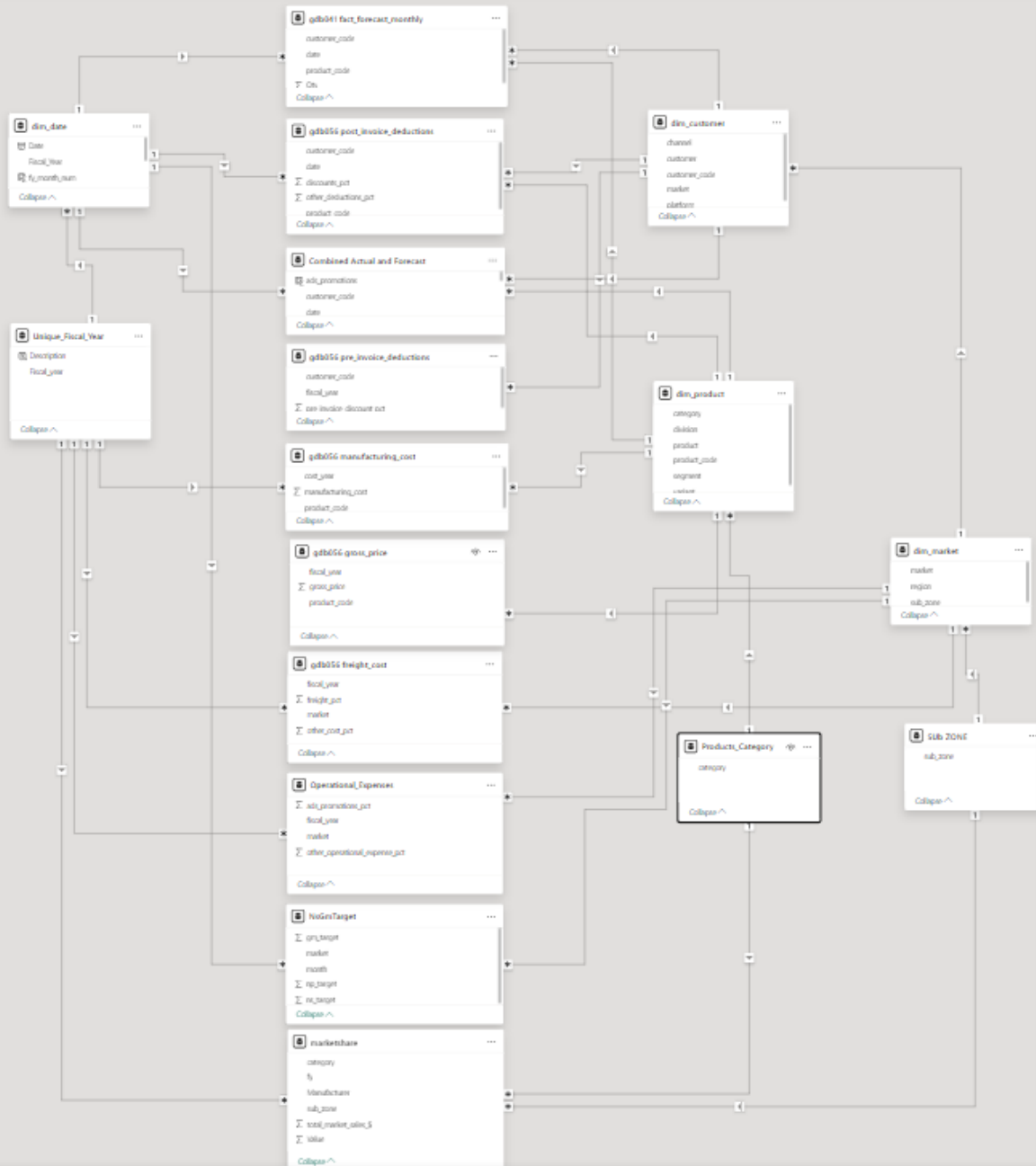
Data Pipeline and Steps:



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Data Model:

- Here we have used the snowflake schema.
- To eliminate the Bidirectional Filtering we have used the Bridge table.
- We have created a custom dimension data table.
- We have created custom groups to segregate dimension and fact tables in power query.



Home Page

- This page will provide an overview of sales insights and help the users and stakeholders understand and Navigate through the specific view of the analysis.
- Last sales data updated
- Report refresh date
- Understanding the each view.

**AtliQ Technologies Sales Insights 360**

						
Info	Finance View	Sales View	Marketing View	Supply Chain View	Executive View	Help
Download user manual and get to know the key information of this tool.	Get P & L statement for any customer / product / country or aggregation of the above over any time period and More..	Analyze the performance of your customer(s) over key metrics like Net Sales, Gross Margin and view the same in profitability / Growth matrix .	Analyze the performance of your product(s) over key metrics like Net Sales, Gross Margin and view the same in profitability / Growth matrix .	Get Forecast Accuracy , Net Error and risk profile for product, segment, category, customer etc.	A top level dashboard for executives consolidating top insights from all dimensions of business.	Get your issues resolved by connecting to our support specialist.

Report Refresh Date21 July 2024

All Values are in Dollars and Millions

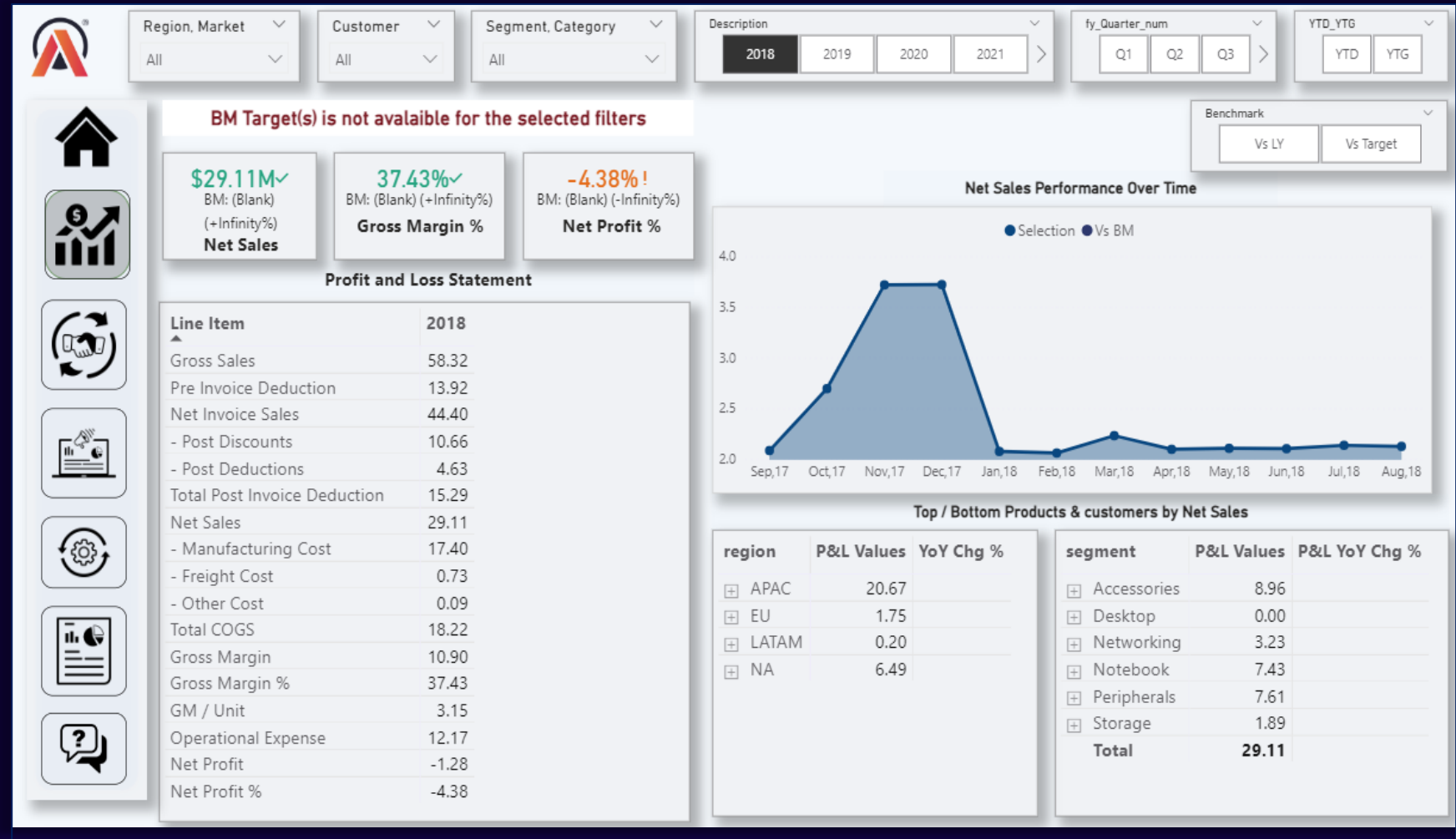
Sales Data Loaded Until :Dec 21

Finance View

- This page will provide information on Finance fundamentals, especially
- Profit and loss statement
- Net sales performance over time
- Top / Bottom products by Net Sales.
- Top / Bottom, products by Net sales

Important KPIs like

- Net Sales
- Gross Margin %
- Net Profit %
- Finally the stakeholders can able to view these parameters by different Customers, segments, Market, fiscal years, quarters, etc.



Note:

BM : Benchmark

YTD : Year to Date

YTG: Year to Go

LY : Last Year

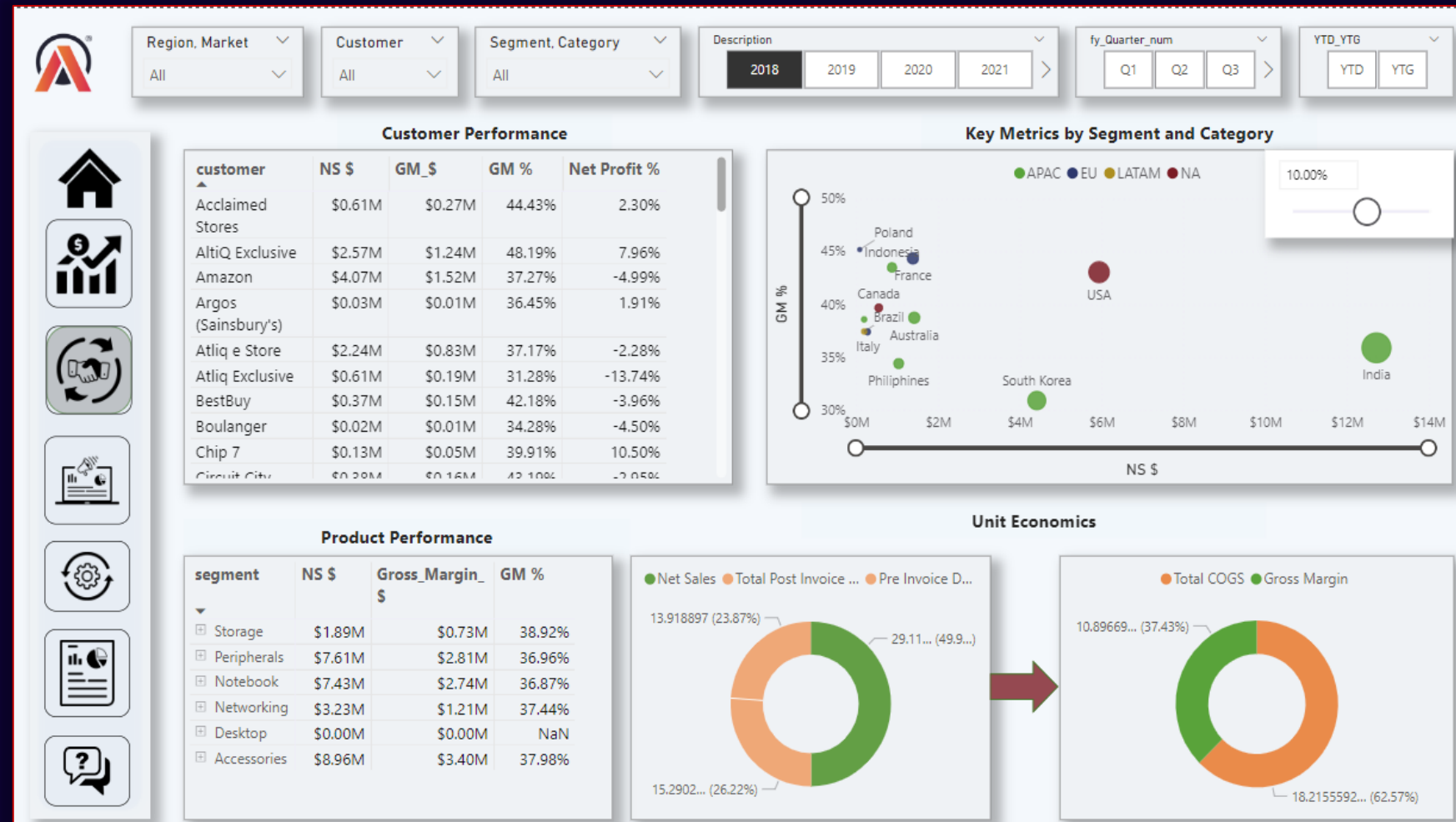
FY : Fiscal Year

Sales View

- This page will mainly focus on customers, business growth/customer, and gross margin.
- Per customer Gross Margin %, Net sales and Net profit %.

Important KPIs like

- Net Sales
- Gross Margin %
- Net Profit %
- Finally the stakeholders can able to view these parameters by different Customers, segments, Market, fiscal years, quarters, etc



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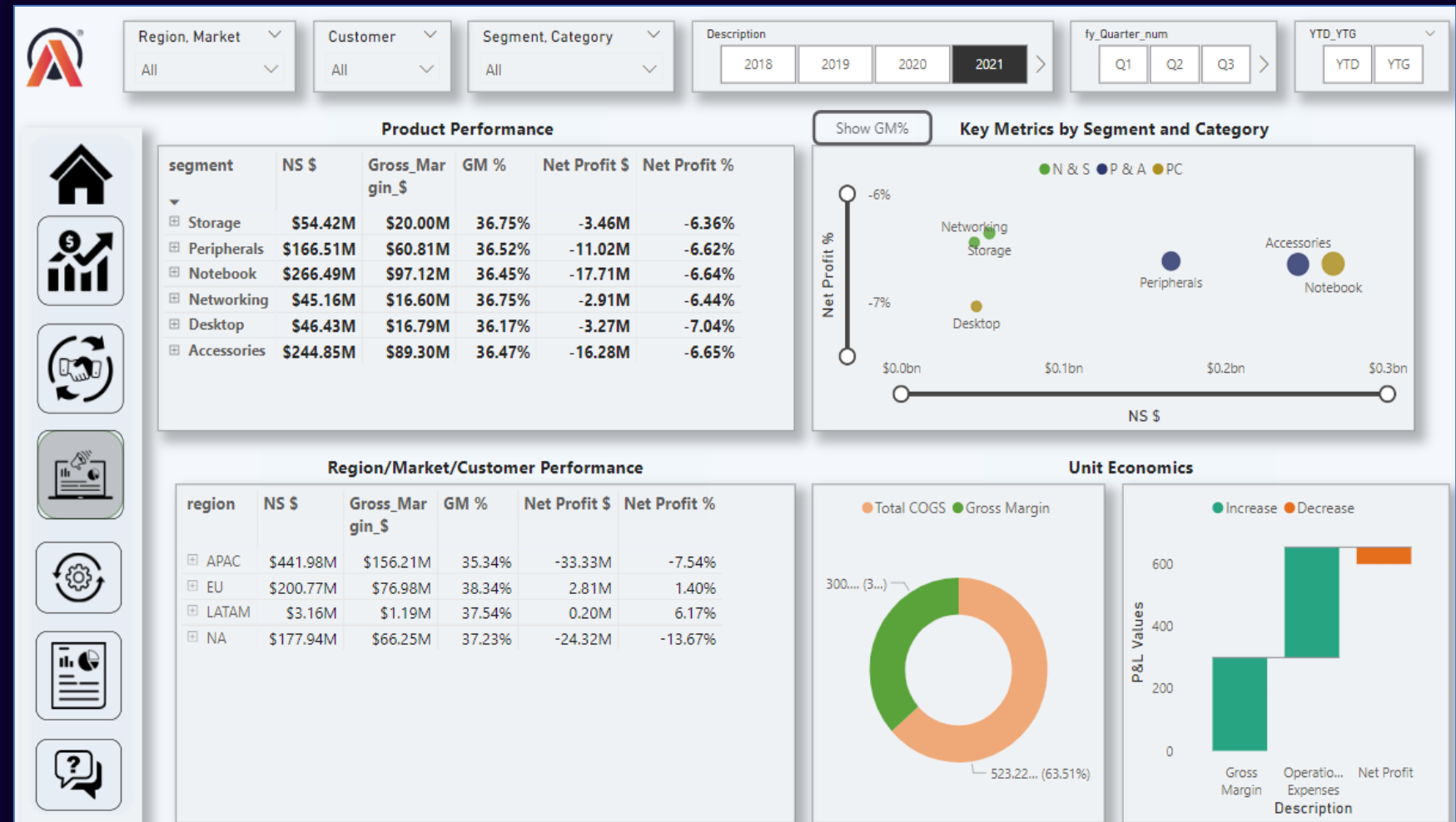
FY : Fiscal Year

Marketing View

- This page will provide insights to the marketing team which will mainly focus on products, marketing cost, and net profit.
- The marketing team will aim to reduce the marketing cost and reach the product globally.

Important KPIs like

- Net Sales
- Gross Margin %
- Net Profit %
- Total COGS
- Total Operational Expenses
- Finally the stakeholders can able to view important key parameters to make the decision and strategic planning.



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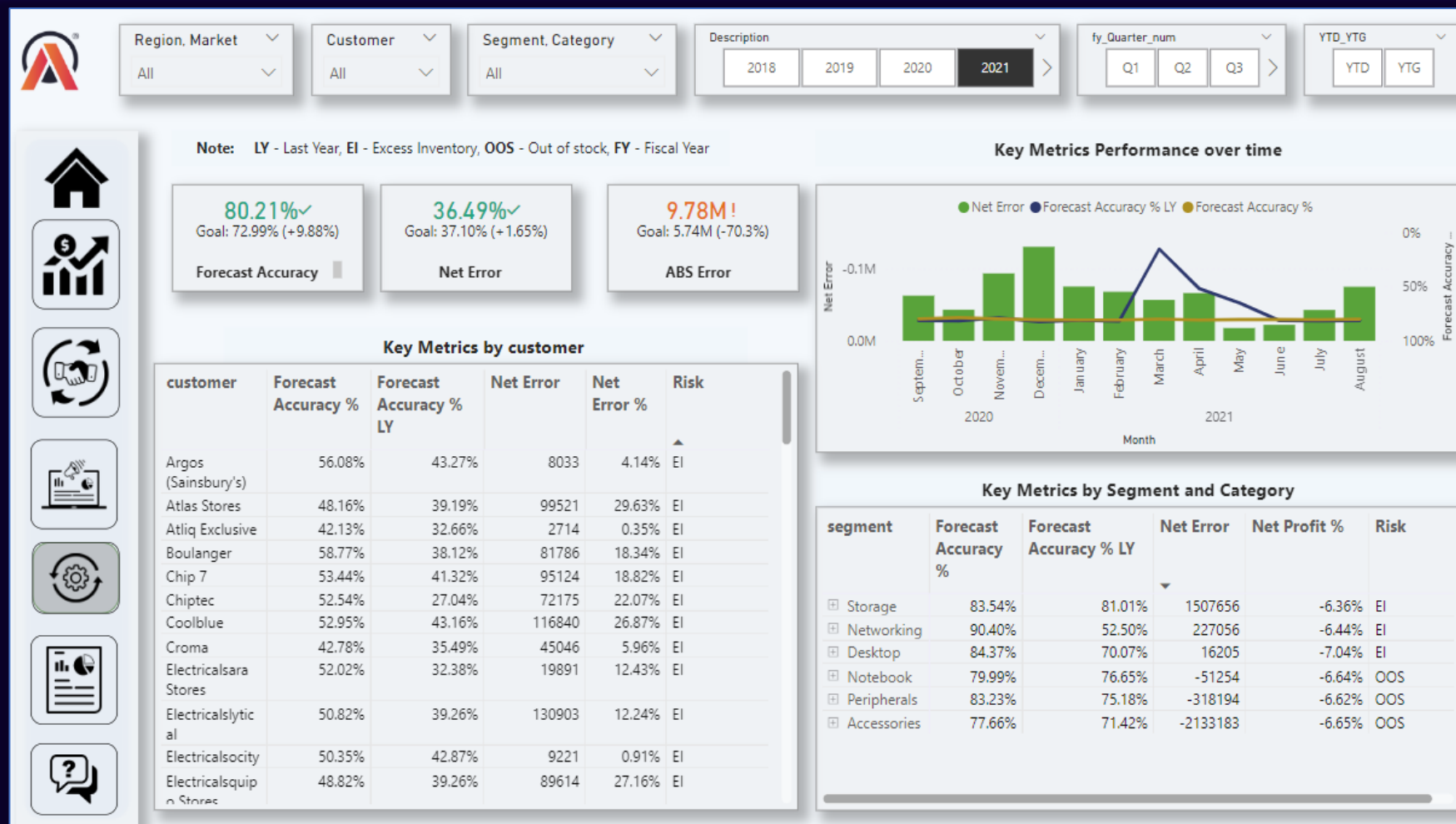
Supply Chain View

- This page will mainly focus on supply chain KPIs and understanding the Net error that leads to excess inventory and cost.

Important KPIs like

- Forecast Accuracy
- Net Error %
- ABS Error
- Risk

- Finally the stakeholders can able to view these parameters by different Customers, segments, Market, fiscal years, quarters, etc



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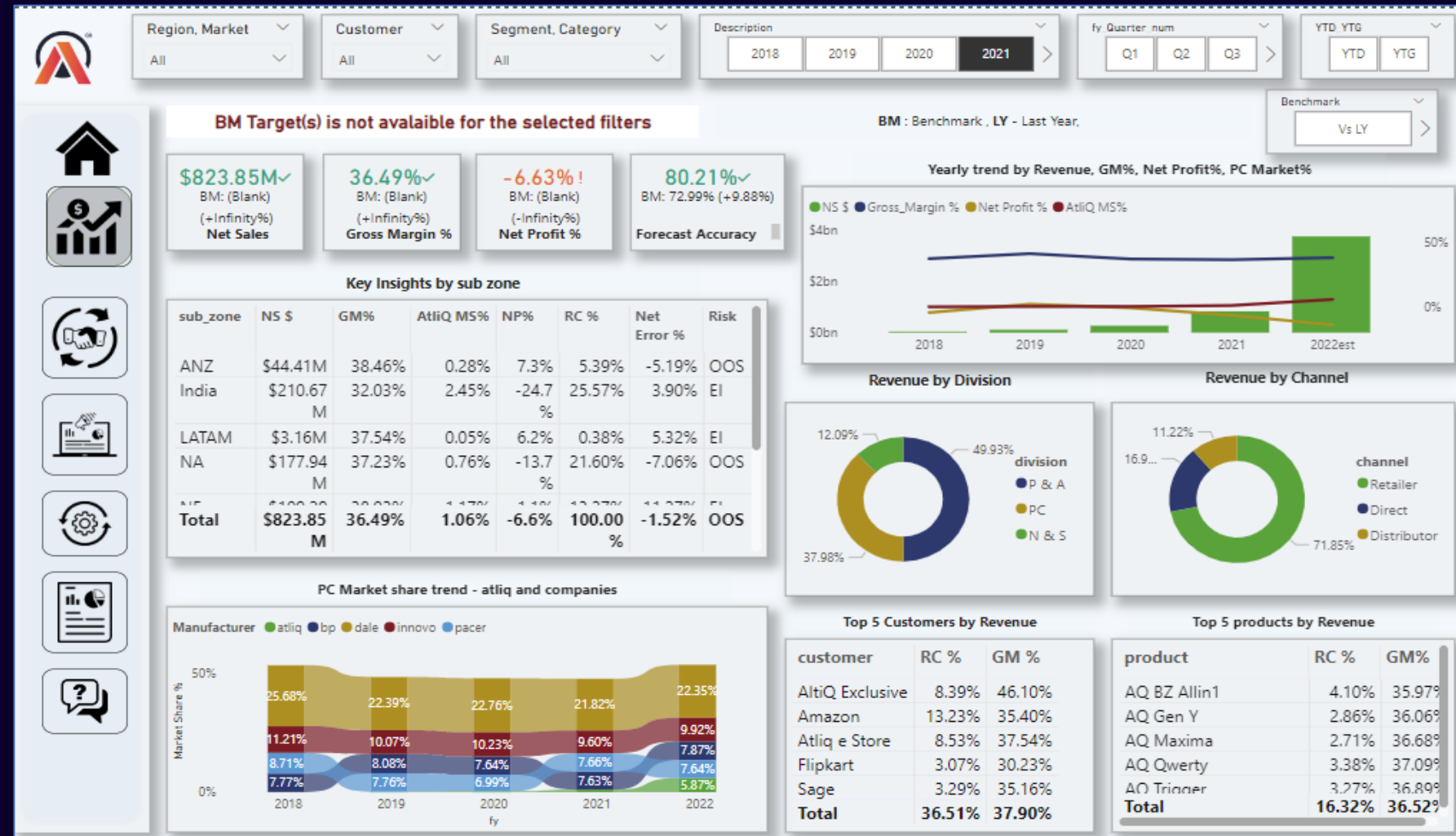
FY : Fiscal Year

Executive View

- This page will mainly be focused on high-level KPI metrics and provide an overview of the whole business to the Executive-level people.

Important KPIs like

- Net Sales
- Gross Margin %
- Net Profit %
- Forecast Accuracy
- Revenue by Division, channels.
- Market share of AtliQ
- Target Vs Actual
- Finally the stakeholders can able to view these parameters by different Customers, segments, Market, fiscal years, quarters, etc



Note:

BM : Benchmark

YTD : Year to Date

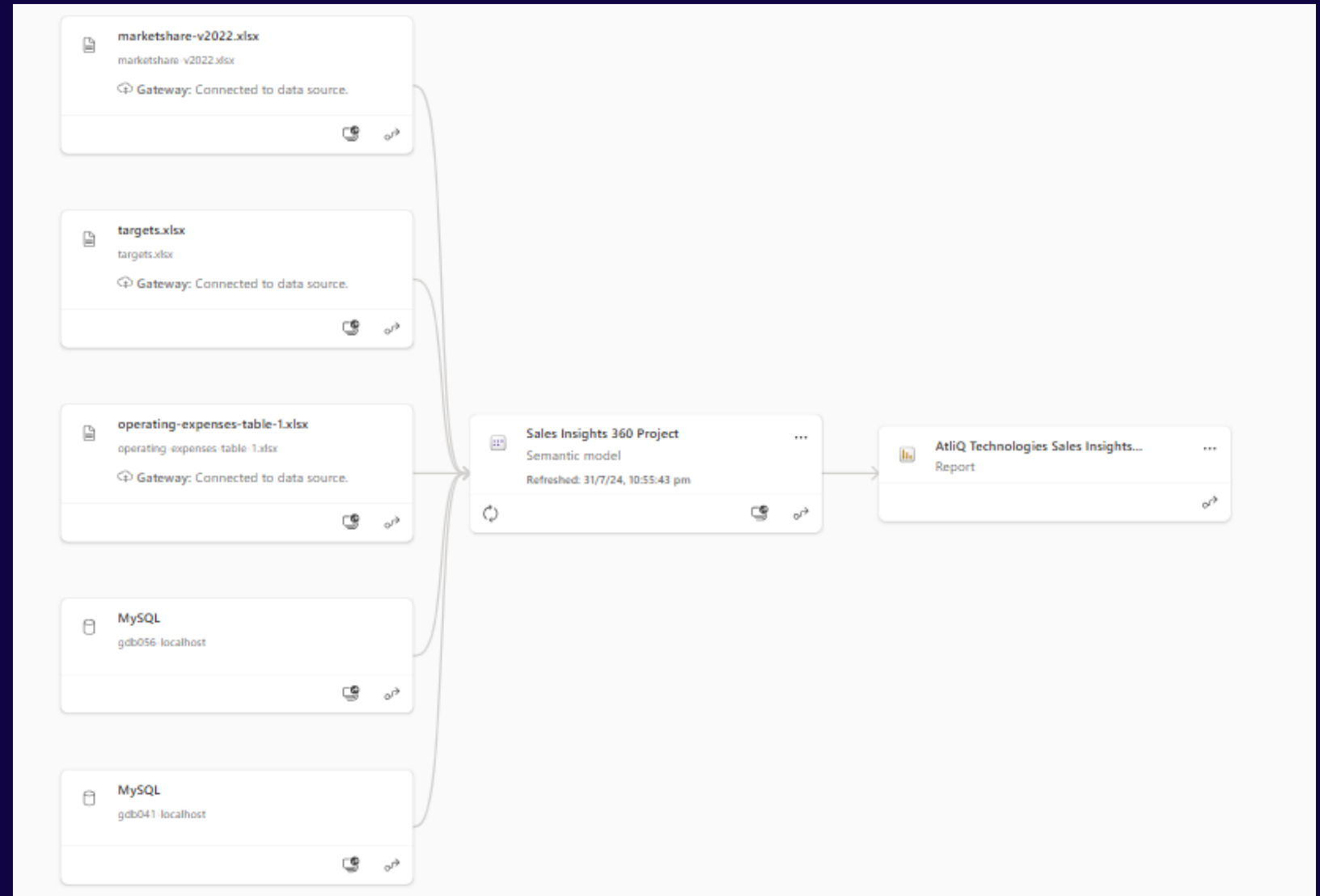
YTG: Year to Go

LY : Last Year

FY : Fiscal Year

Linage View

- *This is the lineage view of our dashboard in the workspace of Power BI service.*
- *It helps to understand how the different data sources have been connected to the final cloud dataset which is being used by our final Power BI report.*



Learnings:

Technical Skills:

- 1. **MySQL** - Data Import, Connecting to Power BI, Data Validation .*
- 2. **Power BI Desktop** – Power Query, DAX, Transformation, DAX Studio, Data Modelling, Fact tables, Dimension tables, Snow flake Schema, Performance Analyzer, M language, Custom columns, DAX Variables, Parameters, Bookmarks, Dynamic buttons, Tooltips, Slicers, Row Context, Filter Context, Visualization.*
- 3. **DAX Functions** : ALL, CALCULATE, SUMX, SWITCH, IF, SUM, ALLNOBLANKROW, ISBLANK, ISFILTERED, ISCROSSFILTERED, SELECTEDVALUE, ALLEXCEPT, DIVIDE, UNION, ROW, COUNTROWS.*
- 4. **Power BI service**: Access, Gateway, Workspace, Scheduled Refresh, App, Report, Dataset, Sharing, Admin, member, contributor, viewer ,MS Teams, Analyze in Excel .*

Learnings:

Soft Skills :

1. *Communication*
2. *Project Management Skills*
3. *Story Telling*
4. *Good Listening and Attention*
5. *Creativity*
6. *Always doing home work before any meetings*
7. *Think out of box*

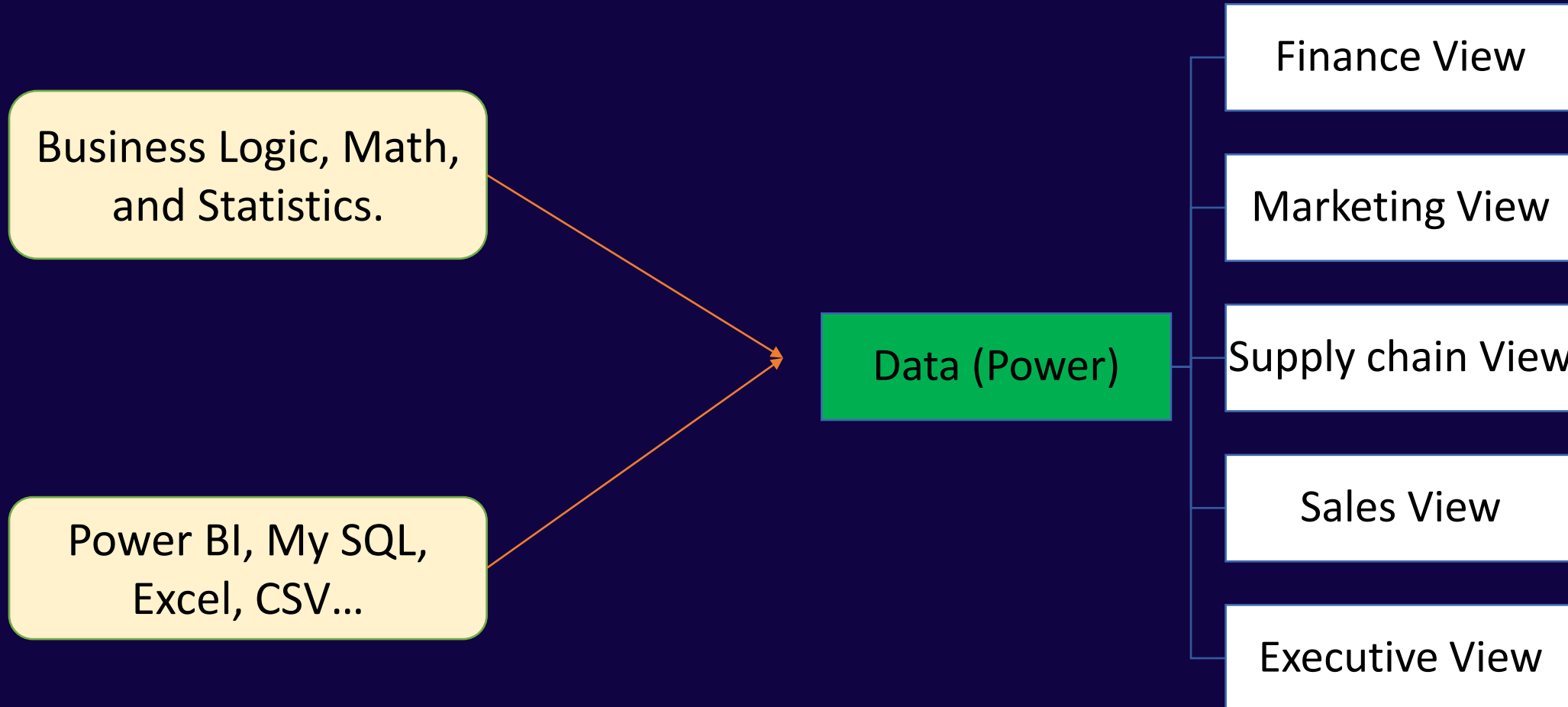
Business KPI's:

- *Net Sales, Gross margin, Net profit, pre-invoice deduction, post-invoice deduction, pre-invoice amount, promotional offers, COGS, Operational cost, freight cost, inventory, forecast accuracy, Net error, supply chain, Discount, target, Benchmark etc*



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Overview:





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Thank You

