

## Performance Report 2023-2024

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### Overview

This Power BI project analyzes sales data for a company across two years, 2023 and 2024, focusing on three critical metrics: Quantity, Sales, and Gross Profit. The dashboard includes year-to-date and prior-year-to-date comparisons to highlight trends and performance.

### Project Workflow

#### 1. Dataset Overview

- Source: [Describe the dataset's origin if applicable].
- Key attributes: Date, Quantity, Sales, Gross Profit, Region.

#### 2. Data Preparation

- Utilized Power Query for cleaning and transforming raw data.
- Ensured consistency in date formats and numerical fields.

#### 3. DAX Measures

##### Created measures for:

- YTD Metrics: To calculate cumulative totals for the current year for quantity, gross profit, and sales.
- PYTD Metrics: For prior-year comparisons for the same metrics.
- Switch metrics for PYTD and YTD.
- Applied time intelligence functions to compare performance year-over-year.

#### 4. Visualization

##### Developed various visuals:

- Treemap: To highlight performance by category.
- Scatter Chart: To analyze correlations.
- Waterfall Chart: Used to display changes in sales and profits across different periods.
- Added dynamic chart titles and axis formatting for a better user experience.

## **5. Key Insights**

- Profit Growth: Identified significant growth in certain regions during Q2 2024.
- Product Performance: Highlighted categories with strong profit margins despite lower sales quantities.
- Performance Gaps: Pinpointed areas needing attention through year-over-year metrics.

## **Learning Outcomes**

- Mastered waterfall charts for visualizing incremental changes in metrics.
- Deepened understanding of DAX for advanced calculations.
- Enhanced storytelling and user interactivity in Power BI.