

## Financial Sales Dashboard Analysis

Presented By: Jitu Kumar

Date: 20.11.2024

### Introduction

The **Financial Sales Dashboard** is a comprehensive analysis tool designed to uncover actionable insights from sales data. It focuses on key areas such as sales performance, profitability, discount strategies, and geographic trends.

### Dataset Overview:

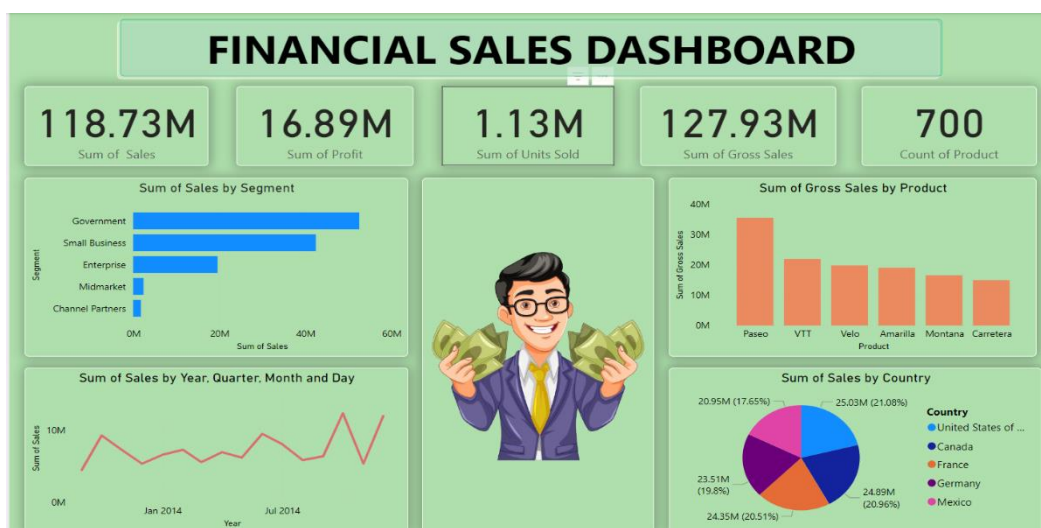
- a. **Rows and Dimensions:**
  - **700 rows** of financial data.
  - Covers segments, products, geography, time periods, and key metrics.
- b. **Geographies:**
  - United States, Canada, Mexico, France, and Germany.
- c. **Time Frame:**
  - Data spans 2014, broken into years, quarters, months, and days.
- d. **Metrics:**
  - **Sales, Gross Sales, Discounts, Profit, Units Sold.**

### Objective:

The dashboard aims to identify sales trends, optimize profitability, evaluate discount strategies, and prioritize geographic expansion opportunities.

### Report Page 1: Sales Performance Overview

This page provides a high-level summary of sales data, highlighting top contributors and overall performance.



- i. **Bar Chart: Sales by Segment.**
  - **Purpose:** Compare revenue contributions by business segment.
  - **Insights:** Government is the leading segment, with potential growth in Small Business.
- ii. **Column Chart: Gross Sales by Product.**
  - **Purpose:** Assess product performance by revenue.
  - **Insights:** Paseo and VTT are the highest contributors to gross sales.
- iii. **Line Chart: Sales Over Time.**
  - **Purpose:** Track seasonal trends and growth patterns.
  - **Insights:** Peaks in mid-year suggest seasonal demand or promotions.
- iv. **Pie Chart: Sales by Country.**
  - **Purpose:** Visualize the geographic distribution of sales.
  - **Insights:** The United States dominates sales, followed by Canada and France.
- v. **Key Metrics (Card Visuals):**
  - **Total Sales:** \$118.73M.
  - **Profit:** \$16.89M.
  - **Gross Sales:** \$127.93M.
  - **Units Sold:** 1.13M.
  - **Products:** 700

## Report Page 2: Profitability Insights

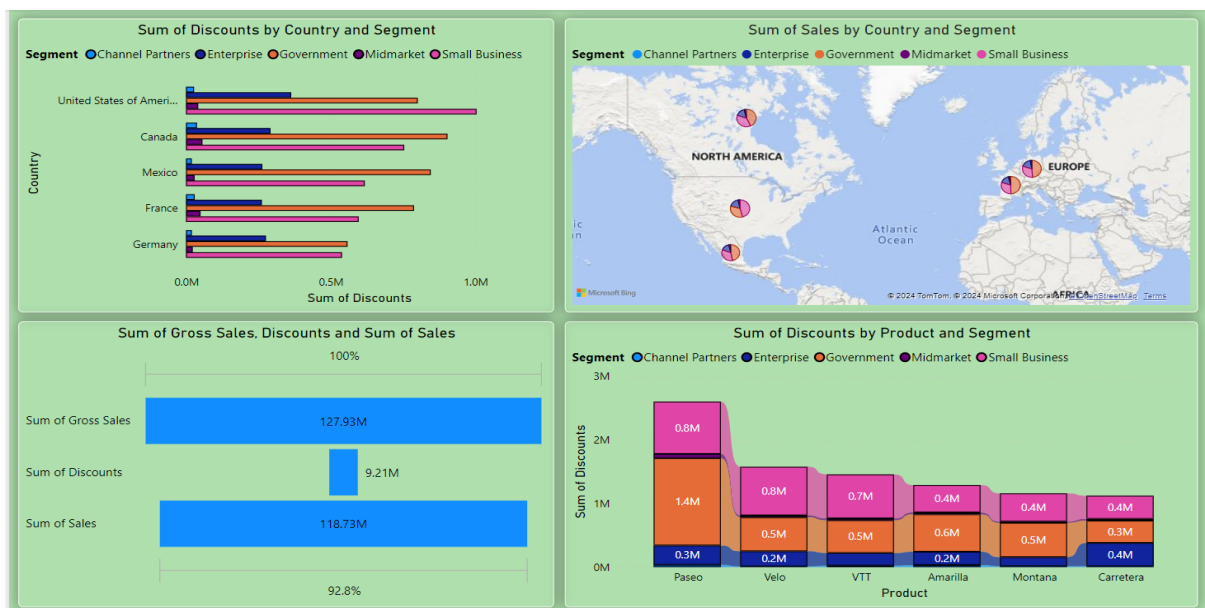
This page dives deeper into profitability, showing how sales translate into profit across products, segments, and regions.



- i. **Stacked Column Chart:** Profit by Product and Segment.
  - **Purpose:** Identify the most profitable product-segment combinations.
  - **Insights:** Paseo drives high profits, particularly in the Government segment.
- ii. **Scatter Chart:** Sales vs. Profit by Country.
  - **Purpose:** Analyze the relationship between sales and profit.
  - **Insights:** The United States leads in both sales and profit efficiency.
- iii. **Treemap:** Profit by Product and Segment.
  - **Purpose:** Visualize the profit hierarchy across products and segments.
  - **Insights:** Paseo and VTT dominate profit distribution.
- iv. **Waterfall Chart:** Gross Sales to Net Sales.
  - **Purpose:** Visualize the impact of discounts on revenue.
  - **Insights:** Discounts reduce Amarilla's revenue significantly.

### Report Page 3: Discount Analysis

This page evaluates the effectiveness of discount strategies and their impact on profitability.



- i. **Clustered Bar Chart:** Discounts by Country and Segment.
  - **Purpose:** Show where discounts are highest.
  - **Insights:** The United States and Small Business segment receive the highest discounts.
- ii. **Map Visual:** Sales by Country.
  - **Purpose:** Show geographic distribution of sales using bubble sizes for volume.

- **Insights:** The United States leads, with Canada and France offering growth potential.
  - iii. **Funnel Chart:** Gross Sales → Discounts → Net Sales.
    - **Purpose:** Show how discounts reduce gross sales to net sales.
    - **Insights:** Discounts account for 7% of gross sales, leaving 93% as net sales.
  - iv. **Stacked Column Chart:** Discounts by Product and Segment.
    - **Purpose:** Assess the discount impact on specific product lines.
    - **Insights:** Paseo receives the highest discounts, likely to drive demand.
- 

## Conclusion and Recommendations

### Key Findings:

- i. Government is the most profitable segment, with Paseo as the top-performing product.
- ii. Discounts are well-managed, with an average discount rate below target.
- iii. Geographic insights suggest expansion potential in Canada, France, and Germany.

### Recommendations:

- i. Focus on expanding high-performing products (e.g., Paseo) in underperforming regions.
- ii. Reduce discounts on high-demand products to increase profitability.
- iii. Leverage seasonal trends for better inventory and marketing strategies.