

TO: Director of Sales, Widget Co.

FROM: Jeremy Walker

SUBJECT: New Dashboard – “Growth of Unit Sales, Nationwide”

EXECUTIVE SUMMARY:

In response to the need to identify and respond to trends in the sales of widgets, I have created a dashboard that highlights key sales metrics. The dashboard’s primary strength is that it highlights when sales performance is notably different from the previous year’s data. The information presented in the dashboard can be used to motivate and inform more focused inquiry regarding sales performance under different sales managers, in different regions, or over the course of time. Although it is assumed that sales growth is ‘good’, no targets are set within the design of the dashboard.

Dashboard Components

- *“Core Sales Data”*

Provides an immediate, top-level, overview of overall sales performance, gross revenue, and comparisons between the most recent year’s (2015) data and the previous year (2014).

- *“Sub-Region by Gross Revenue”*

Provides both gross revenue and the relative increase/decrease in revenue in each sub-region. By default, the list is sorted from the sub-regions with the highest rates of growth to the regions with the lowest rates. This data can be used to identify geographic areas with particularly high or low relative sales performance.

- *“Relative Unit Sales per Month by Product-Type”*

Provides the relative month-by-month increase/decrease in unit sales and is broken down by individual products. Extreme variations in sales performance may indicate large losses or gains in clientele.

- *“Rep Unit Sales Relative to Prior Year”*

Provides a complete listing of every sales manager’s 2015 performance compared to their 2014 performance. Comparisons are for the relative units sold. By default, this data is sorted from highest to lowest relative sales performance. Precise percentages can be viewed by hovering over individual bars within the dashboard.

- *“Rep Unit Sales, Breakdown”*

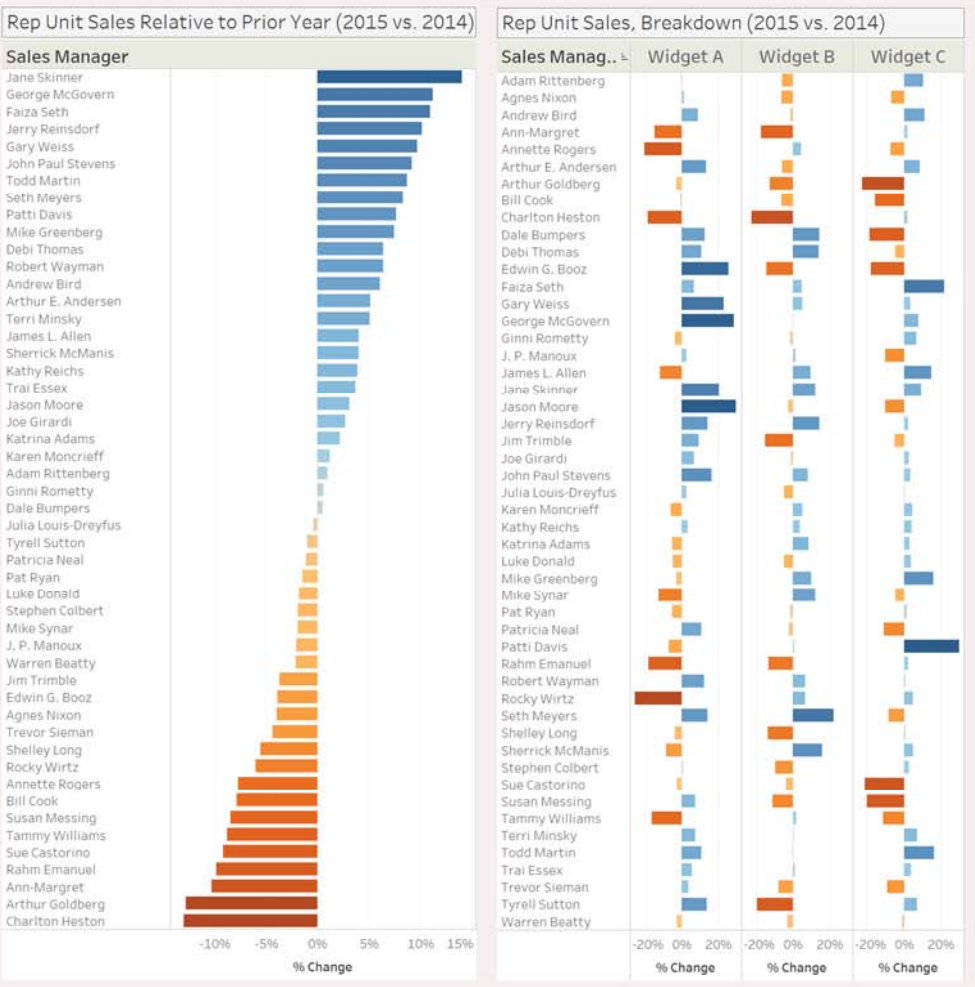
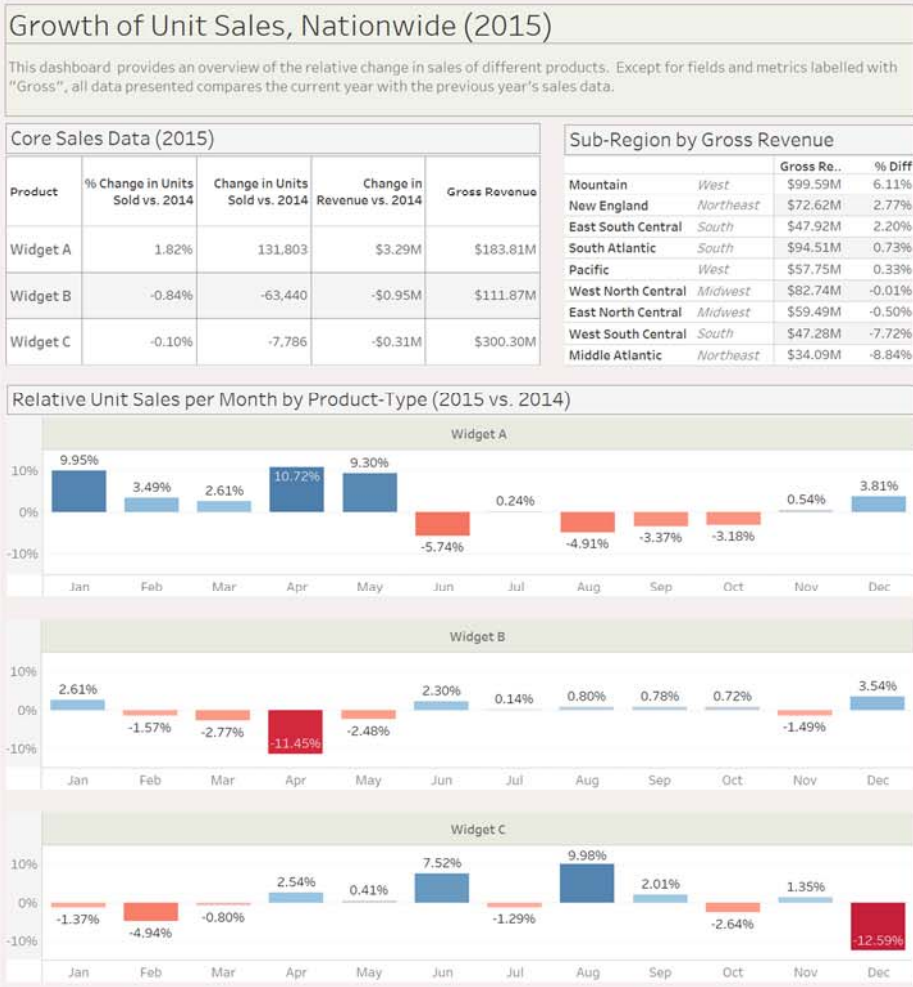
Provides the same information as the previous section, except broken down by product to provide a more granular view of individual sales managers’ relative performance. By default, this data is sorted by the sales manager’s name, however it may be easier for certain analyses to sort this data according to sales performance for specific products (see Example Set #2).

Additional Utility and Caution

While the most obvious use of the dashboard is to highlight extreme changes in sales patterns, you may also use the dashboard to highlight connections between data. For instance, you can select a particular sub-region and the dashboard will immediately highlight all sales-managers connected with that sub-region.

One note of caution: By itself, this dashboard can not explain the underlying causes behind any observed trends or extreme changes in sales performance. The information highlighted in the dashboard can only suggest focal points for further inquiries and analysis before any strategic decisions are made.

Example Set #1



Example Set #2

