

User Requirements & KPIs

Sales Dashboard KPI Discussion Summary

This document outlines a conversation between a Data Analyst and a Business Stakeholder regarding the design of a sales performance dashboard. The objective is to identify the key performance indicators (KPIs), layout, and interactivity features of the dashboard.

Conversation Summary

Business Stakeholder (BS): We're looking for a dashboard that gives us a clear view of our sales performance, especially comparing this year with the previous year. Something the leadership team can use at a glance.

Data Analyst (DA): Understood. Just to clarify, do you want a year-over-year (YoY) performance comparison in terms of total sales?

BS: Yes, exactly. Total sales, and also profits and quantities sold.

DA: Great. So the key metrics—or KPIs—we'll track are:

- Total Sales
- Total Profit
- Total Quantity

Do you want this data displayed monthly or aggregated?

BS: Both, actually. A high-level summary for the year, and then a monthly trend line to understand the ups and downs throughout the year.

DA: Perfect. For the monthly trends, would it be useful if we highlighted the highest and lowest months in terms of performance?

BS: Yes, we often discuss those in our reviews. That would be very useful.

DA: Got it. Would you also like to analyze product performance?

BS: Absolutely. We want to see which sub-categories are performing well or poorly—both in sales and profit. A side-by-side comparison with last year would be ideal.

DA: That can be done using a bar chart to show sub-category sales in 2023 vs 2022, along with corresponding profits and losses.

Also, would weekly trends help? Some managers prefer more granular insights.

BS: Yes, especially for operational reviews. If we can show weekly sales and profit, with markers for performance above or below average, that would be even better.

DA: Great idea. We'll use line charts for weekly trends, and show the average line for reference.

Let's talk about interactivity. Would you like the ability to:

- Filter by year?
- Drill down by region, state, city?
- Filter by product or sub-category?

BS: Yes to all. Different departments look at different cuts of data, so dynamic filters are important. Also, users should be able to click on a chart to filter the rest of the dashboard accordingly.

DA: Understood. Here's a summary of the dashboard layout and KPIs based on our discussion:

KPI Requirement:

Sales dashboard:

- Summary:
 - Display a **summary** of Total sales, Profits, Quantity for current year and the previous year. (Chart type – **Bars**)
- Sales Trends: (Chart type – **Line charts**)
 - Present the data for each KPI on monthly basis for both the current year and the previous year
 - Identify months with the highest and lowest sales and make them easy to recognize
- Product Subcategory Comparison: (Chart type – **Bar charts**)
 - Compare sales performance by different product subcategories for the current year and previous year
 - Include a comparison of sales with profit
- Weekly trends for sales & profit: (Chart type – **Line charts**)
 - Present weekly sales and profit data for current year.
 - Display the average weekly values.
 - Highlight weeks that are above and below the average to draw attention to sales & profit performance.

Design and interactivity requirement:

- Dynamic Dashboard:
 - The dashboard should allow users to check historical data by offering them the flexibility to select a desired year (parameters)
 - Provide users with the ability to navigate the dashboard easily
 - Make the charts and graphs interactive, enabling users to filter data using the charts.
- Data Filters
 - Allow users to filter data by product information and sub category and sub category and by location information like region, state and city.

