

# Executive Data Summary – Adventure Works Q1 Sales Report

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## Introduction

As part of this project, I worked on creating an executive-level data summary in Microsoft Excel to analyze and present Q1 sales data for Adventure Works. This involved data cleaning, applying formulas for key insights, and building an interactive PivotTable for management analysis. The goal was to provide a clear comparison of sales performance between 2022 and 2023 while enabling a detailed breakdown of product sales.

## Key Tasks and Implementation

### 1. Data Preparation & Formatting

- Adjusted column widths and added relevant headings to improve readability.
- Used formatting techniques like bold text, background colors, and Merge & Center for better presentation.
- Applied Wrap Text and Format Painter to maintain consistency across the sheet.

### 2. Data Organization & Structuring

- Used the PROPER function to standardize product names and replaced formulas with static values.
- Sorted the dataset by Order Date (Oldest to Newest) to ensure chronological consistency.
- Hid unnecessary columns and applied Freeze Panes to keep key details visible while scrolling.

### **3. Formula Application for Data Analysis**

- Used MONTH and YEAR functions to extract time-based data from order dates.
- Created sales revenue calculations using a formula: Retail Price × Quantity Sold.
- Implemented an IF function to determine tax applicability (5% tax if sales exceeded \$2000).
- Applied SUMIF formulas to calculate:
  - Total Q1 sales for 2022 and 2023.
  - Monthly sales totals for a better year-over-year comparison.
  - A percentage difference formula to show the sales growth from 2022 to 2023.

### **4. Data Transformation into a Table**

- Converted the dataset into an Excel Table for easier management.
- Assigned the Table Name “Sales\_Details” for structured referencing.

### **5. PivotTable Creation & Analysis**

- Built a PivotTable to summarize sales by product name and category.
- Customized PivotTable settings to display results in Tabular Form.
- Added calculated fields:
  - Sales Total (formatted as currency).
  - % of Total (to show each product's contribution to overall sales).
- Integrated Slicers for Product Category and Year to enable dynamic filtering.

## Key Learnings & Takeaways

- Hands-on experience with Excel formulas such as SUMIF, IF, MONTH, YEAR, and percentage calculations.
- Enhanced data organization and visualization using PivotTables and formatting techniques.
- Practical application of Excel's interactive features like Slicers for real-time data filtering.
- Improved ability to present sales insights in a structured, executive-friendly manner.

## Conclusion

- Through this project, I gained hands-on experience in data cleaning, structured analysis, and dynamic reporting using Microsoft Excel. By leveraging formulas, PivotTables, and interactive elements,
- I transformed raw sales data into meaningful insights that can aid in strategic decision-making. The final report not only provides a clear comparison of sales trends between 2022 and 2023 but also allows for interactive data exploration through slicers and structured tables.
- This experience has strengthened my data analysis skills and enhanced my ability to present findings in a clear, executive-friendly format, making it a valuable asset for business analysis.