FINANCIAL PERFORMANCE DASHBOARD

UN MENTOR PROJECT REPORT

Introduction to Financial Performance

Financial performance refers to the assessment of a company's ability to generate revenue, manage its expenses, and create value over a given period. It is an essential aspect of business management, as it provides insights into a company's profitability, efficiency, and overall financial health. By analyzing financial performance, stakeholders, including executives, investors, and analysts, can evaluate how effectively a company is using its resources to generate returns.

Key financial metrics commonly assessed to measure financial performance include:

- **Revenue:** The total income generated from the sale of goods or services, reflecting the company's top-line growth.

- **Profit Margins:** Measures such as gross profit margin, operating margin, and net profit margin that indicate how well a company turns revenue into profit at different stages of its operations.

- **Return on Investment (ROI):** A performance measure used to evaluate the efficiency of an investment or compare the efficiencies of several investments.

- **Cash Flow:** Tracks the inflow and outflow of cash, providing insights into the company's liquidity and ability to meet short-term obligations.

- **Expense Ratios:** Evaluates the proportion of expenses relative to revenue, helping assess cost management effectiveness.

A comprehensive analysis of these financial metrics helps stakeholders identify strengths, weaknesses, and areas for improvement in the business. It also enables the forecasting of future performance, which is crucial for decision-making related to strategic planning, budgeting, and investment opportunities.

This Power BI dashboard project is designed to give a comprehensive view of the company's financial performance, allowing for easy monitoring and analysis of these key financial metrics. Through visually compelling and interactive charts, stakeholders can gain valuable insights to drive better decision-making and achieve sustainable business growth.

Power BI Visualizations for Financial Performance

STEPS:

Sales and Profit by Country (Bar Chart)

1. **Drag Country to Columns:**

- Select the Country field from the data pane and drag it to the Columns area of the visualization pane.

2. **Drag Sales to Rows:**

   - Drag the Sales field to the Values area to show the sales by country.

3. **Color by Profit:**

   - Drag the Profit field into the Color mark (or Values section if using Power BI's built-in features) to color the bars based on profit, allowing easy comparison of profitability by country.

4. **Choose Bar Chart:**

   - In the visualizations pane, select the Bar Chart type. You can choose either a Clustered Bar Chart or a Stacked Bar Chart based on your preference.

5. **Add Filters for Segment and Product:**

   - Drag Segment and Product fields into the Filters pane to allow users to filter and refine the data analysis by these categories. You can place them in the Filters on this visual section.

Sales and Profit Trend Over Time (Line Graph)

1. **Drag Year to Columns:**

   - Drag the Year field from the dataset into the Columns area to group the data by year.

2. **Drag Sales and Profit to Rows:**

   - Drag both the Sales and Profit fields into the Values area (or Rows) to visualize both metrics over time.

3. **Change the Chart to a Line Graph:**

   - In the visualization pane, select Line Chart to represent the trends of both Sales and Profit over time.

4. **Add Month Name to Columns:**

   - Drag the Month Name field (or Date field) to the Columns area, next to Year, for a more granular analysis by month.

5. **Color by Segment:**

   - Drag the Segment field to the Legend or Color mark in the visualization. This will differentiate the trends by business segment (e.g., Consumer, Corporate).


Gross Sales vs Discounts (Scatter Plot)

1. **Drag Gross Sales to Columns:**

- o **Drag the Gross Sales field to the Columns area.**

2. **Drag Discounts to Rows:**

   - o **Drag the Discounts field to the Rows area.**

3. **Change the Chart to a Scatter Plot:**

   - o **In the visualizations pane, select the Scatter Plot option. This allows you to see how Gross Sales are related to Discounts.**

4. **Use Size or Color to Differentiate between Product or Country:**

   - o **Drag the Product or Country field to the Size or Color mark. This will help in visualizing the distribution of Gross Sales and Discounts based on either product or country, making the chart more insightful.**

Sales by Product and Discount Band (Heat Map)

1. **Drag Product to Rows:**

   - o **Drag the Product field into the Rows area to show each product on the y-axis.**

2. **Drag Discount Band to Columns:**

   - o **Drag the Discount Band field into the Columns area to show the different discount ranges on the x-axis.**

3. **Drag Sales to Color:**

   - o **Drag the Sales field into the Color mark. This will color-code the heat map based on the sales performance in each product and discount band combination.**

4. **Change the Visualization to Heat Map:**

   - o **In the visualizations pane, select Heat Map (or use a Matrix visual and then apply color formatting based on sales values) to show how sales vary across product types and discount bands.**

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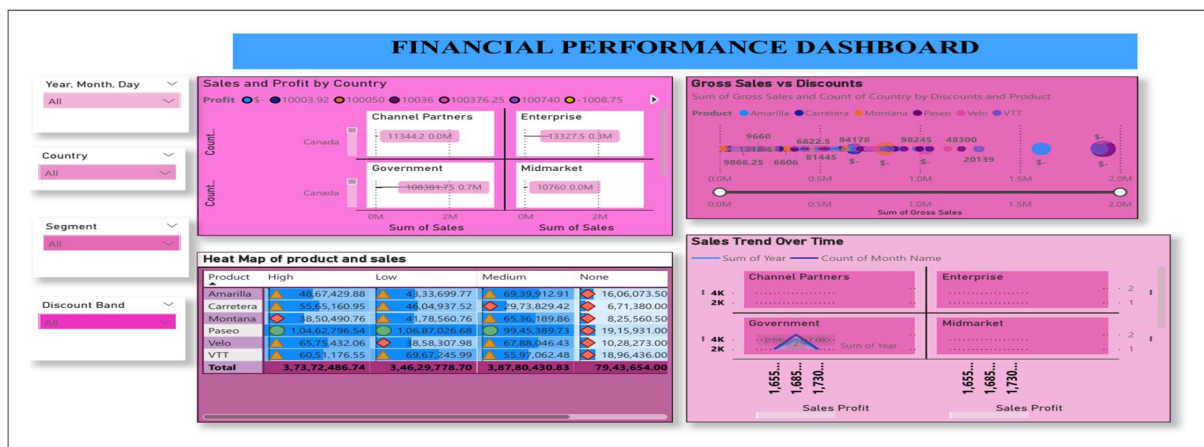
1. Sales and Profit by Country

The panel shows the sales and profit data categorized by different segments (Channel Partners, Enterprise, Government, Midmarket) for each country (e.g., Canada). The sum of sales is plotted, providing a comparative view of the segments.The Government and Channel Partners segments in Canada have higher sales figures, indicating better market penetration in these sectors. However, further analysis may be needed to understand profitability variations across segments.

2. Gross Sales vs Discounts

This scatter plot visualizes the relationship between gross sales and discounts across various products (e.g., Amarilla, Carretera). The size of the dots represents the magnitude of sales or discounts.Products like "Paseo" and "Montana" have a higher gross sales value. A clear trend might suggest that discount bands directly influence sales figures, highlighting the importance of strategic discounting.

3. Heat Map of Product and Sales

The heat map provides an overview of sales across different product categories (Amarilla, Carretera, Montana, etc.) segmented by discount levels (High, Low, Medium, None). Bright colors signify high sales.Products such as "Amarilla" and "Montana" perform better in medium and low discount categories. This suggests a balanced discounting strategy works well to maximize revenue.

4. Sales Trend Over Time

This section highlights how sales trends evolve across years, with breakdowns by segments (Channel Partners, Enterprise, etc.). The data shows the count of months contributing to sales in each segment.The Government and Midmarket segments exhibit more consistent sales trends over time compared to others. This may indicate better stability and customer retention in these sectors.

Final Conclusion:

These visualizations in Power BI provide an insightful analysis of various financial metrics, including Sales, Profit, Discounts, and Products, in a way that empowers stakeholders to make data-driven decisions. By using interactive and visually appealing charts such as Bar Charts, Line Graphs, Scatter Plots, and Heat Maps, this dashboard enables a deeper understanding of the company's financial performance across different countries, time periods, products, and business segments. This helps businesses identify trends, inefficiencies, and opportunities to optimize operations and boost profitability.