**Sales Dashboard Analysis  
Overview**

This documentation explains the Power BI dashboard solution created for the sales department based on Steven's (Sales Manager) business requirements. The dashboard provides visual insights into internet sales data, allowing sales representatives and managers to track customer performance, product performance, and sales against budget.  
  
**Business Requirements**

The sales department requested to transition from static reports to visual dashboards that focus on:

* Sales by product
* Sales by customer
* Sales performance over time
* Comparison against budget
* Ability to filter by sales representative's customers and products
* Historical data going back 2 years from 2021

**Problem**

The sales department relies on static reports that lack visual insights, making it difficult to:

* Track product and customer performance effectively
* Monitor sales against budget targets
* Enable sales representatives to focus on their specific customers and products
* Analyze sales trends over time

**Objectives**

1. Create visual Power BI dashboards that update daily
2. Provide sales managers with overview dashboards to track performance against budget
3. Give sales representatives detailed customer and product views with filtering capabilities
4. Enable analysis of sales trends over a 2-year historical period
5. Transition from static Excel reporting to interactive visual analytics

**Insights**

1. **Performance vs. Budget**: Total sales ($22,239,730) are exceeding budget ($21,100,000) by 5.4%, indicating strong overall performance
2. **Product Mix Imbalance**: The business is heavily dependent on bikes (95.32% of sales) with minimal revenue from accessories (3.15%) and clothing (1.53%)
3. **Customer Concentration**: A small number of customers (like Jordan Turner at $15,999) account for a disproportionate amount of total revenue
4. **Seasonal Patterns**: Sales show clear seasonality with peaks in June and October-December
5. **Geographic Concentration**: Sales are clustered in specific regions (coastal US, UK, Western Europe) with minimal penetration in other areas
6. **Product Leaders**: Touring-3000 Yellow models and Women's Mountain Shorts consistently outperform other products
7. **Sporadic Purchasing**: Several customers show irregular buying patterns rather than consistent purchasing

**Recommendations**

1. **Product Strategy**:
   * Develop bundle offerings to increase accessories and clothing attachment rates
   * Focus marketing resources on proven top-performers (Touring-3000, Mountain Shorts)
   * Align inventory planning with observed seasonal patterns
2. **Customer Strategy**:
   * Implement a tiered loyalty program to retain top customers
   * Target geographic expansion into underserved regions
   * Develop strategies to reduce dependency on top 10 customers
3. **Sales Operations**:
   * Equip sales representatives with customer-specific insights
   * Adjust budgeting process to account for seasonal variations
   * Create incentives that reward product mix diversification
4. **Dashboard Evolution**:
   * Add predictive forecasting capabilities
   * Incorporate customer retention metrics
   * Implement product bundling analysis views
   * Add sales velocity metrics to track purchase frequency