# Expanding Retail Performance through Detailed Transaction Analysis



## Background

As an Analytics Manager at Homeward Unified Luxury Traders (HULT), a leading retail company recognized for its diverse products and unparalleled customer service, you are central to its strategic decision-making process. With operations spanning nationwide and a thriving e-commerce presence, HULT encompasses an extensive customer base, further empowered by an enticing membership and loyalty program enticing customers with exclusive perks.

## Objective

A thorough examination of 10,000 transactions spanning 2015 to 2018 conducted by your analyst has laid out valuable insights about purchasing patterns. This data, supplemented with visual aids including bar charts, scatter plots, distribution & line charts, provides a strong foundation for understanding customer behavior.

The senior management now relies on your expertise to interpret this data and transform it into an executive briefing. The emphasis is on creating a concise, organized narrative integral to shaping business decisions that amplify customer engagement and enhance revenue generation.

## Approach

Your task revolves around the crafting of a brief but impactful executive report using the data and visuals provided by your business analyst. Here's how you should proceed:

Data Interpretation: Start with a comprehensive understanding of the data, focusing on vital trends, consistencies, and outliers. Weave together a consistent narrative that accurately represents customer spending habits based on the data. Keep in mind your analyst is a new graduate so some of the material may not be useful, or insightful but you can trust that it is correct. You are also expected to note additional data, visuals, or insights that could be helpful to strengthen your narrative but are lacking in the provided material. Identifying data narrative gaps strengthens your consultative business acumen. Additionally, you are encouraged to seek out and contextualize your narrative with trustworthy external sources.

Key Findings: Identify the most consequential findings from the data for an executive audience. Highlight trends or behaviors that could significantly impact HULT’s promotional strategies and revenue potential.

Decisive Insights: Distill these findings into clear and actionable insights. This step involves deducing or inferring trends that can steer strategic decisions for maximum impact.

Recommendations: Formulate a set of recommendations for future strategy, based on these insights. These suggestions can guide marketing campaigns, operations or other lines of business to increase revenue. You are expected to be consultative using data for the executive audience.

## Deliverables

Once you've constructed an in-depth picture and narrative based on the data provided, you're expected to deliver:

Written Report: A concise, written supplement, not exceeding two pages, outlining the key findings, insights, and recommendations to senior management. This report should be easily digestible, engaging, and informative, allowing executives to understand the narrative data at a glance.

PowerPoint Presentation: A crisp presentation containing the crucial information outlined in the written supplement, enriched further with relevant visuals provided by the analyst. This tool aids in narrating the data story effectively, supplementing the written brief.

Narrated Slide Show: Complement this PowerPoint presentation with a voiceover explanation of the data and visuals. This spoken presentation should offer an engaging overview of the findings, enhancing the comprehension of the report and presentation.

Highlights to Focus on: You are primarily responsible for delivering the condensed narrative that frames strategic decision-making to affect revenue, operations, marketing or any other line of business you think is pertinent based on the data.

Accomplishing these tasks diligently enables you to contribute significantly to shaping the broader business strategies at HULT, ensuring continued growth and success.

## Data

The raw data file, a folder of visuals and a folder of aggregated, and summary data tables has been provided. You are free to use the material provided and not expected to work with raw data to perform your own analysis. It is provided so you understand the raw data form. However, you may extract additional insights from the raw data if doing so strengthens your narrative.

## Criteria for Success

Please review the University rubric for specifics related to this case.

## Delivery and Narration Guidance

You are not allowed to use an ai avatar, or speech creation for narration. While this is certainly useful technology in many instances, the purpose of the business case presentation is to improve your presentation skills. In a business setting you will still be expected to articulate your findings and not send an avatar for this type of business meeting. As a result services like <https://elevenlabs.io/> or <https://www.heygen.com/> are not permitted. Your “boss” or “audience” in the case will not accept these technologies.

## Written Supplemental Guidance

Submit a document to represent the entirety of your presentation including the data, process, findings, and implications in a business setting. Thus it’s a professional report, anything less than a professionally written and organized report will be considered sub-optimal. Amazon for example doesn’t use PowerPoint and instead uses “6 pagers” to make business recommendations, as such some organizations prefer written information over presentations. The use of external and verifiable sources is expected to add context and support any component of the paper. The document should be 2 pages with double spaced and 12 point font.

## Overall guidance:

You are expected to submit, a voiceover narration of a live business presentation (can be a standalone video file, or inserted within the powerpoint), a set of slides, and a written supplemental. If you submit documents with links to youtube videos or cloud drive files, you must ensure all links are accessible. Links set to private which are not viewable or downloadable will automatically result in 0 for that section of the rubric.