

SALES AND TARGET ANALYSIS

- BY
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SALES ANALYSIS KPIs

1. Sales Growth Rate

Description: Sales growth rate measures the percentage increase or decrease in sales over a specified period.

Formula: $\text{Sales Growth Rate} = ((\text{Current Sales} - \text{Previous Sales}) / \text{Previous Sales}) * 100.$

2. Sales Year to Date (YTD)

Description: Year to date (YTD) refers to the period of time beginning on the first day of the current calendar year or fiscal year and extending up to the current date. In essence, YTD sales provide a snapshot of a company's sales performance up to the current date.

3. Average Sales per Customer

Description: Average Sales per Customer is an important CRM metric that helps ecommerce businesses understand how well they are doing when it comes to acquiring and servicing customers.

Formula: $\text{Average Sales per Customer} = \text{Total Sales Generated} / \text{Total Number of Customers}.$

4. Average Order Value (AOV)

Description: Average order value is the average amount of money spent each time a customer places an order.

Formula: $\text{AOV} = \text{Total Revenue} / \text{Number of Orders}$

TARGET ANALYSIS KPIS

•1. VARIANCE

•**DESCRIPTION:** VARIANCE ANALYSIS INVOLVES COMPARING PLANNED OR BUDGETED FIGURES WITH ACTUAL RESULTS TO IDENTIFY DISCREPANCIES AND UNDERSTAND THE REASONS BEHIND THEM. THE VARIANCE FORMULA IS USED TO CALCULATE THE DIFFERENCE BETWEEN A FORECAST OR TARGET AND THE ACTUAL RESULT.

•**FORMULA:** $\text{VARIANCE} = \text{ACTUAL SALES} - \text{TARGET SALES}$

•2. VARIANCE PERCENTAGE

•**DESCRIPTION:** VARIANCE PERCENTAGE IS A MEASURE THAT EXPRESSES THE VARIANCE AS A PERCENTAGE OF THE TARGET OR BUDGETED VALUE. IT PROVIDES A STANDARDIZED WAY TO UNDERSTAND THE MAGNITUDE OF THE VARIANCE IN RELATION TO THE TARGET. THE FORMULA FOR VARIANCE PERCENTAGE IS:

•**FORMULA:** $\text{VARIANCE PERCENTAGE} = (\text{VARIANCE} / \text{TARGET VALUE}) * 100$

•3. PERCENTAGE OF TARGET REACHED

•**DESCRIPTION:** THE PERCENTAGE OF TARGET REACHED IS A KPI THAT INDICATES THE PROPORTION OF THE TARGET THAT HAS BEEN ACHIEVED. IT IS CALCULATED BY COMPARING THE ACTUAL PERFORMANCE TO THE TARGET AND EXPRESSING IT AS A PERCENTAGE.

•**FORMULA:** $\text{PERCENTAGE OF TARGET REACHED} = (\text{ACTUAL VALUE} / \text{TARGET VALUE}) * 100$

•4. MONTHS TARGET REACHED

•**DESCRIPTION:** THE MONTHS TARGET REACHED KPI MEASURES THE NUMBER OF MONTHS WITHIN A SPECIFIED PERIOD IN WHICH THE TARGET HAS BEEN REACHED. THIS KPI IS PARTICULARLY USEFUL FOR TRACKING THE TIMELINESS OF ACHIEVING TARGETS.

SUMMARY

SALES ANALYSIS

TARGET ANALYSIS

PRODUCT INSIGHTS

CUSTOMER INSIGHTS

MANAGER INSIGHTS

QUERIES

SALES ANALYSIS DASHBOARD

260K

Total Quantity Sold

53K

Total Orders

\$17.91M

Total Sales

1272

Total Customers

75.15%

Target Reached %

\$23.83M

Total Target Sales

DASHBOARD

Year

All

Month

All

Category

All

Manager

All

Team

All

Line of Business

All

City

All

Clear all slicers

SUMMARY

SALES ANALYSIS

TARGET ANALYSIS

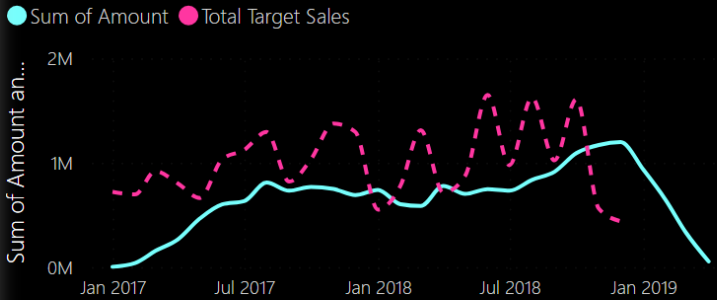
PRODUCT INSIGHTS

CUSTOMER INSIGHTS

MANAGER INSIGHTS

QUERIES

Target and Sales by year

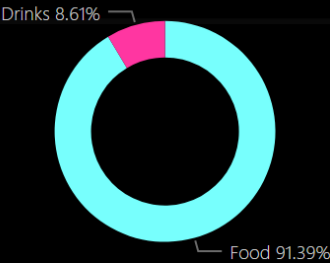


Sales Growth
12.23%

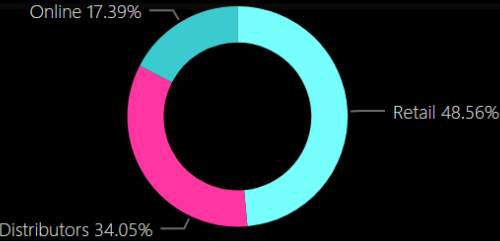
Avg Sales per Customer
14.08K

Total Sales
\$17.91M
Total Sales YTD 1.95M

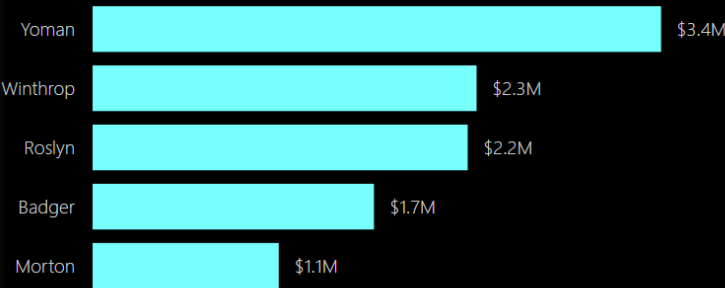
Sales by Category



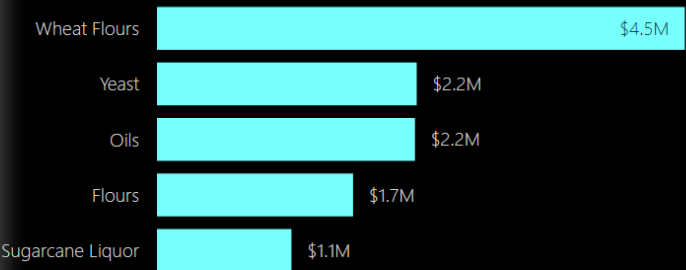
Sales by Team



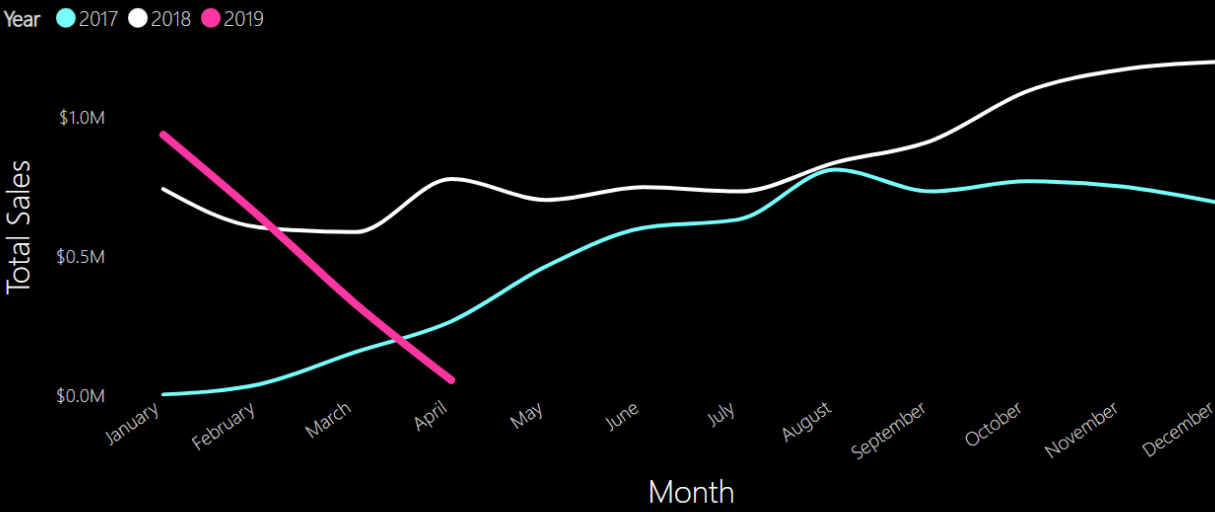
Top 5 Sales by City



Top 5 Sales by Product



Year on Year Sales



DASHBOARD

Year

All

Month

All

Category

All

Manager

All

Team

All

Line of Business

All

City

All

Clear all slicers

- SUMMARY
- SALES ANALYSIS
- TARGET ANALYSIS
- PRODUCT INSIGHTS
- CUSTOMER INSIGHTS
- MANAGER INSIGHTS
- QUERIES

Total Sales

\$15.96M

YTD : 10.07M

Total Target Sales

\$23.83M

YTD : \$12.08M

Variance

(\$7.87M)

YTD : (\$2.01M)

Variance %

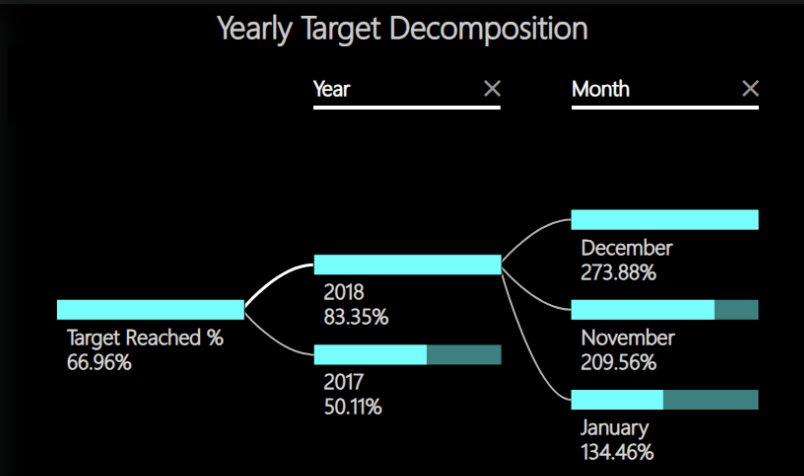
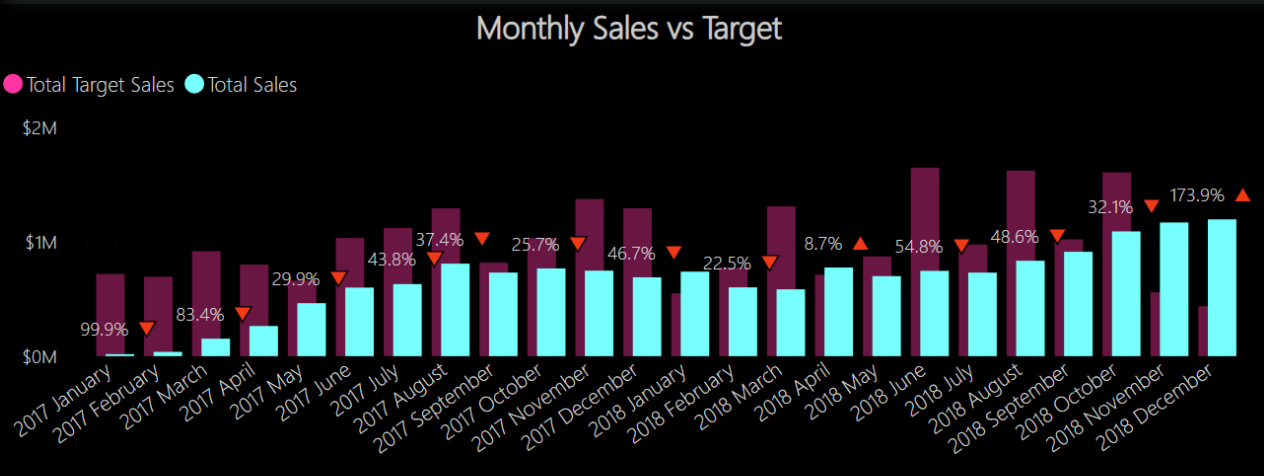
33.0%

YTD : -16.65%

Months Target Reached

1

Targets Met by Salesperson						
Salesperson	Total Sales	Target Reached %	Variance %	Total Sales by date	Months Target Reached	Target Status by Month
Akeel Mcleod	\$2,269K	83.78%			4	
Ayaana Mackenzie	\$705K	36.84%				
Dominykas Bird	\$1,509K	73.59%			2	
Gillian Gonzales	\$1,487K	73.01%			2	
Kien Mcgee	\$200K	46.80%			2	
Lorenzo Donovan	\$542K	32.84%			1	
Sahil Seymour	\$4,365K	83.55%			4	
Serenity Rich	\$479K	15.78%				
Shakil Durham	\$2,083K	80.48%			3	



DASHBOARD

Year

Month

Category

Manager

Team

Line of Business

City

All

All

All

All

All

All

All

Clear all slicers

SUMMARY

14,080

Avg Sales per Customer

\$340.7

Avg Order Value

1,272

Count of Customer_ID

52.6K

Total Orders

\$17.91M

Total Sales

SALES ANALYSIS

TARGET ANALYSIS

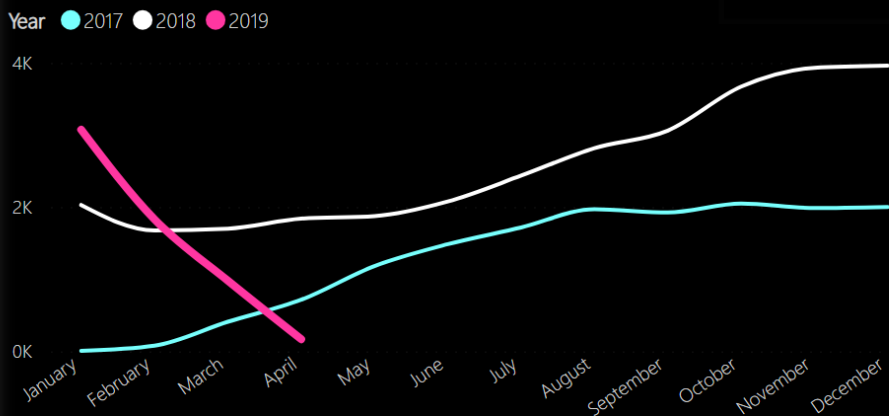
PRODUCT INSIGHTS

CUSTOMER INSIGHTS

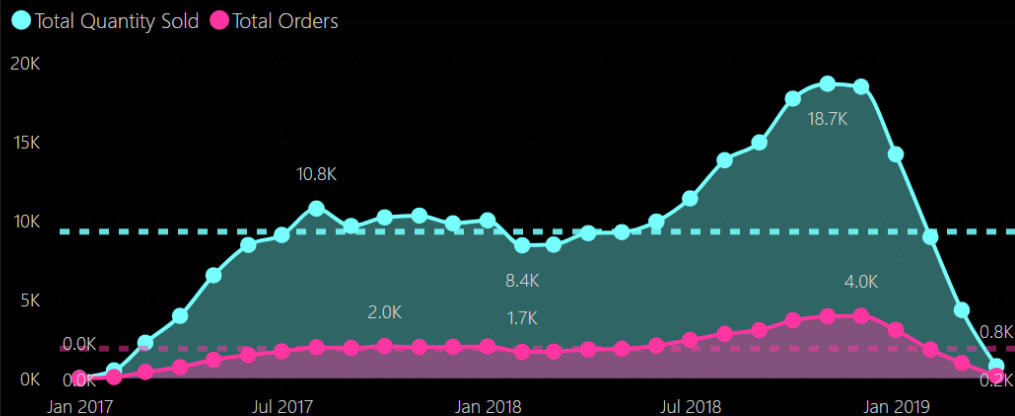
MANAGER INSIGHTS

QUERIES

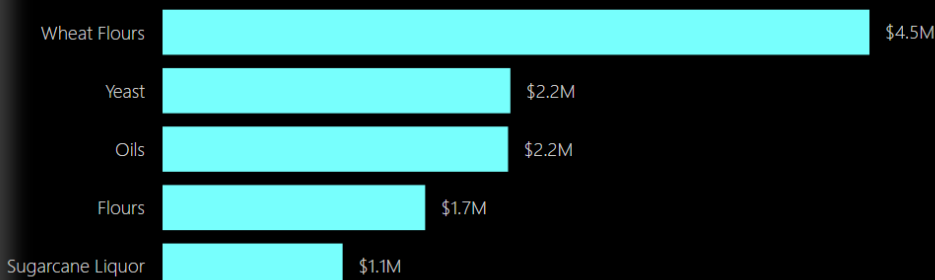
Year on Year Orders



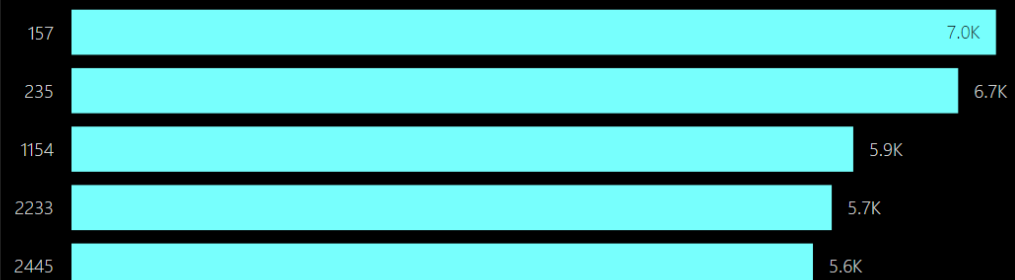
Total Quantity and Total Orders by Year



Top 5 Sales by Product



Top 5 Products Ordered



DASHBOARD

Year

Month

Category

Manager

Team

Line of Business

City

All



All



All



All



All



All



All



Clear all slicers

SUMMARY

Total Customers

1272

Total Sales

\$17.91M

YTD : 1.95M

Avg Order Value

\$340.7

Avg Sales per Customer

14.08K

SALES ANALYSIS

TARGET ANALYSIS

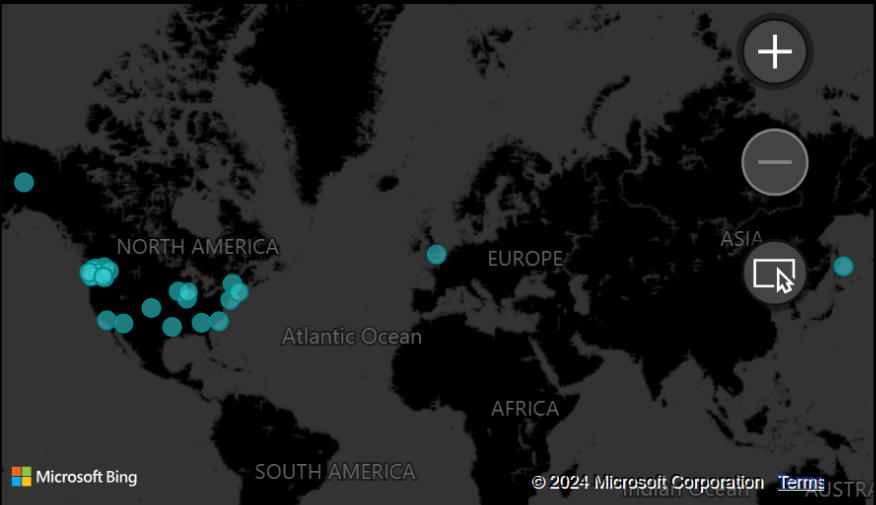
PRODUCT INSIGHTS

CUSTOMER INSIGHTS

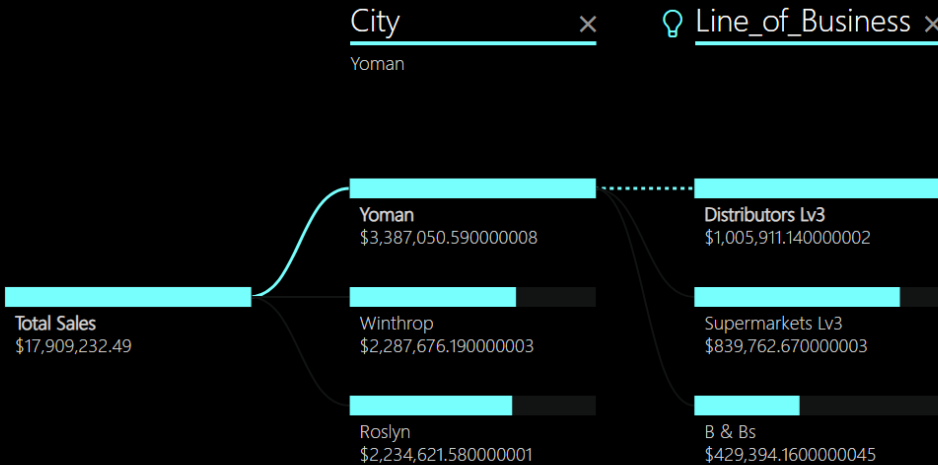
MANAGER INSIGHTS

QUERIES

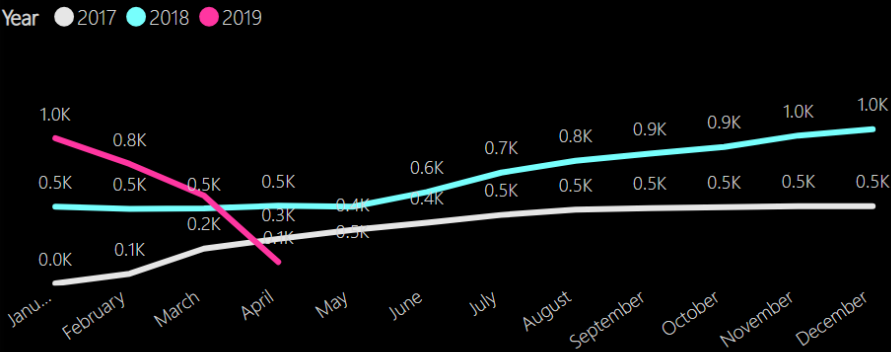
Total Sales by City



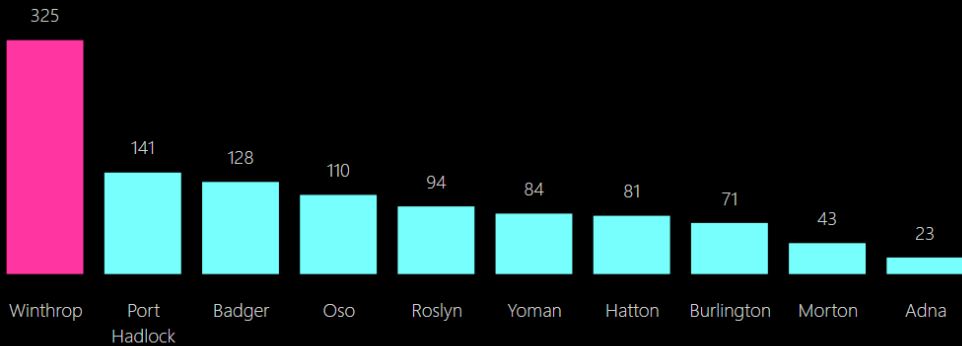
Distribution of Sales by City and Line of Business



Total Customers by Month and Year



Top 5 Cities with highest Customers



DASHBOARD

Year

Month

Category

Manager

Team

Line of Business

City

All

All

All

All

All

All

All

Clear all slicers

SUMMARY

SALES ANALYSIS

TARGET ANALYSIS

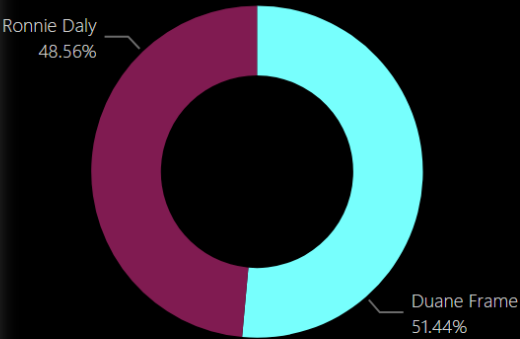
PRODUCT INSIGHTS

CUSTOMER INSIGHTS

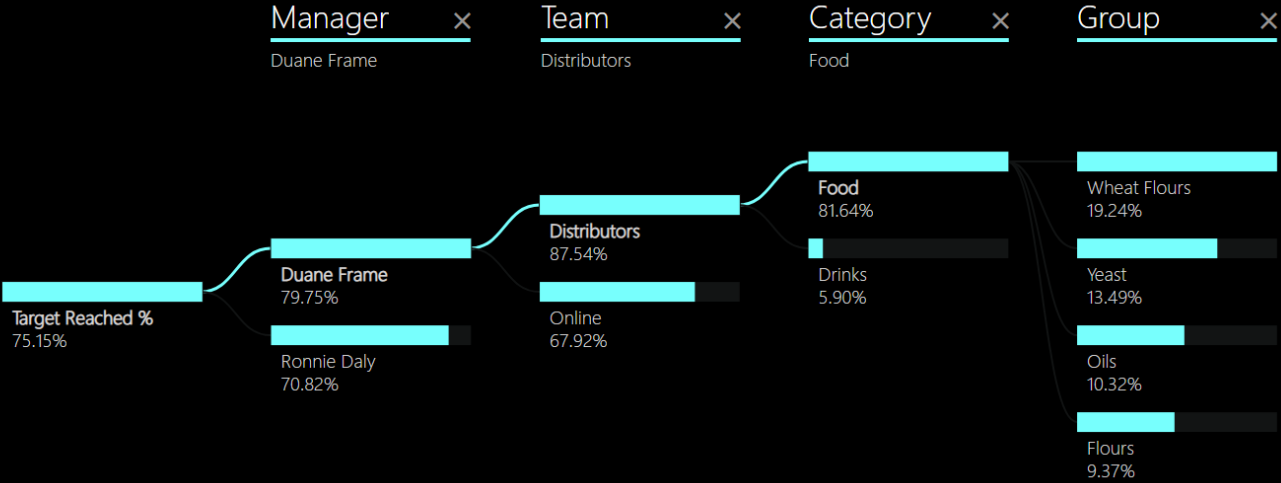
MANAGER INSIGHTS

QUERIES

Total Sales by Managers



Sales Decomposition by Manager and Category Products



Manager-wise Yearly Sales

Year Manager	2017			2018			2019		
	Sales	Quantity Sold	Target	Sales	Quantity Sold	Target	Sales	Quantity Sold	Target
<div><div></div>Duane Frame</div>									
<div><div></div>Distributors</div>	<div><div></div>\$2.24M</div>	<div><div></div>32829</div>	<div><div></div></div>	<div><div></div>\$3.31M</div>	<div><div></div>49920</div>	<div><div></div></div>	<div><div></div>\$0.55M</div>	<div><div></div>8836</div>	<div><div></div></div>
<div><div></div>Online</div>	<div><div></div>\$0.54M</div>	<div><div></div>11277</div>	<div><div></div></div>	<div><div></div>\$1.98M</div>	<div><div></div>38631</div>	<div><div></div></div>	<div><div></div>\$0.59M</div>	<div><div></div>9534</div>	<div><div></div></div>
<div><div></div>Ronnie Daly</div>									
<div><div></div>Retail</div>	<div><div></div>\$3.10M</div>	<div><div></div>37424</div>	<div><div></div></div>	<div><div></div>\$4.78M</div>	<div><div></div>61765</div>	<div><div></div></div>	<div><div></div>\$0.81M</div>	<div><div></div>9880</div>	<div><div></div></div>

DASHBOARD

SUMMARY

SALES ANALYSIS

TARGET ANALYSIS

PRODUCT INSIGHTS

CUSTOMER INSIGHTS

MANAGER INSIGHTS

QUERIES



Ask a question about your data

Try one of these to get started

top cities by total
sales

top cities by total
customers

what is the total sales
by city

what is the total
orders by city

[Show all suggestions](#)

Dashboard shows the following insights:

- ✓ Important metrics such as Revenue, Target, Variance%, Sales Quantity, Average Order Value and Customers are placed above the page.
- ✓ According to the data, the company **rarely achieves** its targets.
- ✓ The top-selling product of the company is "**Wheat Flours**".
- ✓ Customers are mostly located in North America.
- ✓ "**Food**" contributes **91.39%** to the company's entire revenue.
- ✓ The "**Retail Team**" has garnered the **most revenues** for the company.
- ✓ The company earns a significant amount from **supermarkets**, specifically bigger supermarkets.
- ✓ Between the two managers, **Duane Frame** has performed better than Ronnie Daly in terms of revenue.
- ✓ Other insights may be pointed out through the matrices on the dashboards.
- ✓ When you hover to the desired data in the matrix. It provide the users with quick access to determine if the revenue of each row reached its target. Overall, the company only **reached 75.1% of its target revenues**.