This report provides an overview of the newly implemented Sales and Marketing Dashboard for Mountain Wheels Superstore. The tool is designed to align with the three given use cases, providing insights into customer purchasing history, regional sales data, and returns and customer feedback. The dashboard serves as a decision-making platform, offering actionable intelligence to enhance sales performance, customer satisfaction, and growth strategy.

The dashboard focuses on three priority goals: customers, sales and returns. For each of these priority goals, there are certain KPIs which support each one. Thus, the dashboard is segmented into three primary sections: Customer Purchase History and Preferences, Regional Sales, and Returns and Customer Feedback. Additionally, there is one overview page which gives a brief overview of each of the three sections mentioned above. Each section hosts a series of interactive visuals, designed for maximum usability while providing a range of information.

Overview of Sales and Customers:

- This page gives a brief overview of what will be understood on a deeper level in the next three pages. This page is broken up into three sections: Customer Purchase History and Preferences, Regional Sales, and Returns and Customer Feedback. Each section has a few cards/visuals giving the user some important overall values of each priority goal.
- Customer Purchase History: Number of unique customers (can understand market penetration and effectiveness of customer acquisition strategies), average transaction value (can understand customer purchasing power), total number of transactions, and a bar chart for sum of total sales revenue by age group (gives a brief overview of how different customer age groups are impacting sales).
- Regional Sales: Total sales revenue (can be used to set financial targets and as a benchmark), net revenue for the last 2 weeks (can understand how trends change on a smaller scale), sum of order quantity and sum of total sales revenue by region (gives a brief overview of how each region is impacting sales).
- Returns and Customer Feedback: Total return quantity (can prompt a review of product lines or customer service policies), return rate as a percentage (gives stakeholders a sense of the scale of returns and its impact on profit margins), total return value, and return rate as a percentage per category (gives a brief overview of the return rate for each category).
- Of course, the overview page is just supposed to give a brief understanding of the business at a glance.
- Cards were chosen as the main part for the overview page because they are effective at ensuring clarity and focus, and prioritization of information. The additional visuals (bar charts/donut chart) were chosen as they gave a bit more detail into each of the KPIs that are expanded on in the next pages.

Customer Purchase History and Preferences:

- Segmentation Analysis: By utilizing customer demographics, we can create finely tuned marketing campaigns, directing resources efficiently to target the right customer groups. For example, we can see that the customers in the age group of 55-64 years old seem to generate the most amount of revenue out of all the age groups. A good strategy would be to continue to supply products that people in this age group tend to buy. Additionally, it would be a good idea to look deeper into why the other age groups aren’t making as

many purchases. Maybe the business can offer discounts for the products other age groups tend to buy more of to promote sales.

- Product Focus: The dashboard highlights popular products, providing a direct insight into consumer preferences, aiding in inventory and marketing focus. For example, bikes seem to be the most popular product category while tires and tubes are the most popular product subcategory. This means that bikes should continue to be supplied at Mountain Wheels Superstore as these are a popular item. Additionally, tires and tubes should also continue to be supplied as they seem to be selling well.
- Behavioral Trends: Monthly purchasing data reveals behavioral trends, allowing us to predict and prepare for peak purchasing times and to develop timely promotional strategies. For example, customers seem to make the greatest number of purchases in June and the least number of purchases in July. This could mean that including some more promotions and offers in July might be a good way to increase sales during this month.

Regional Sales:

- Revenue Distribution: With a clear visualization of sales distribution, we can allocate resources effectively and potentially identify new market opportunities. For example, we can specifically see how much of each subcategory each territory is purchasing (where territory can be drilled down to continent >> country >> region). This gives a granular breakdown of the purchasing trends and habits of specific regions or more general continents.
- Demographic Insights: Detailed demographic data assists in crafting region-specific marketing campaigns, enhancing local engagement and conversion rates. For example, Australia is the region which generates the highest number of sales meaning that Mountain Wheels Superstore should continue supplying the products which are most popular for this demographic, while Canada is generating the least amount.
- Temporal Sales Data: The dashboard tracks sales over time, which is crucial for measuring the impact of sales initiatives and market penetration strategies. For example, the sales from 2016 to 2017 have decreased for regions Central and Northeast, meaning that some steps should be taken to understand why these regions are making less purchases and how can we bring this back up (potentially include some promotions for these regions).

Returns and Customer Feedback:

- Return Quantities and Values: These metrics serve as indicators of product performance and customer satisfaction, highlighting areas for product improvement and customer service focus. This is a good overall indicator of customer satisfaction.
- Feedback Analysis: Comments linked with return data offer qualitative insights, vital for understanding customer experiences and for driving product development. For example, the most common reason for a return is because the item was received broken. This means that the company should investigate why items are being delivered broken and what additional steps can be taken to ensure that items are received intact. Perhaps this is a packaging problem that needs to be fixed. It can also be seen that the number of returns seems to be increasing over the years (2017 has more returns than 2016 which has more returns than 2015). It would be wise to look into whether this is happening because more

products are being sold or maybe because the product quality is decreasing or another reason.

- Category-Specific Returns: Understanding which product categories have higher return rates enables targeted quality improvements and more accurate product descriptions. The products which have the highest rate of return are shorts and the main reason for their returns is unable to pay cash on delivery. Perhaps the company can look into resolving this issue so that less returns are being made as it seems to be a large problem.

Stakeholders are encouraged to engage with the dashboard's filters and interactive features to tailor the data views to their specific needs. The sales team can identify and act on emerging regional trends, while the marketing team can adjust campaigns in real-time based on customer feedback and purchasing patterns. The information in the dashboard can be drilled down using the many filters on each page (including year, category name, age group, education level, gender, price range, subcategory name, territory (by continent, country, region), and reason for return). This allows the user to get a very granular or a very general understanding of their sales, customers and returns, depending on the intent of the stakeholder. Overall, the Sales and Marketing Dashboard is not only a reporting tool but is also an important asset for strategic planning.