

Executive Report: Sales and Profit Performance Analysis (2021–2024)

1. Executive Summary

This project involved the development of a dynamic **Sales and Profit Dashboard** in Microsoft Excel to analyze multi-year transactional data. The analysis identifies a total revenue of **\$1,928,888** with a net profit of **\$247,961**, highlighting a strong growth trajectory led by the Technology sector and the California market.

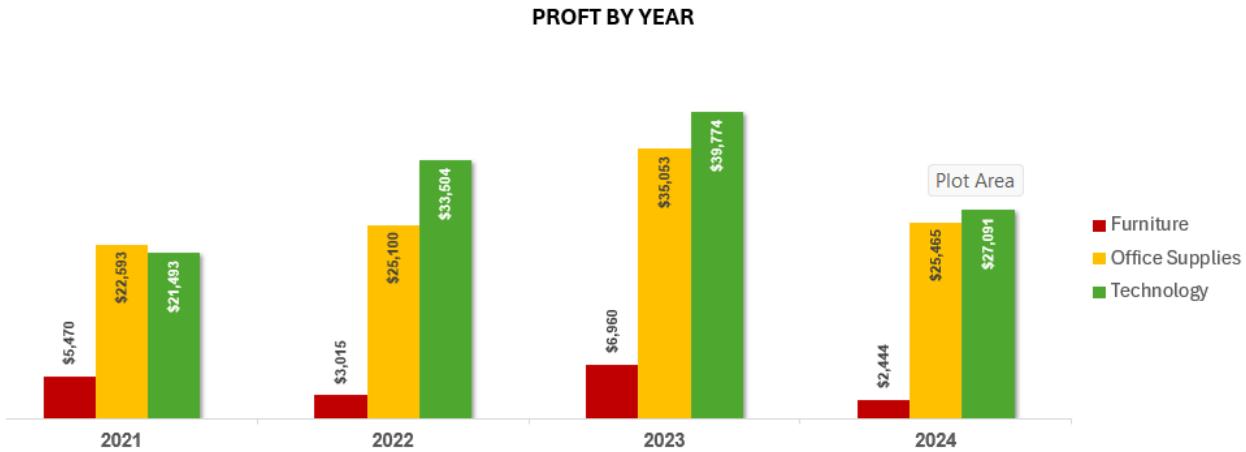
2. Methodology & Excel Development

To ensure data integrity and user interactivity, the following technical workflow was implemented:

1. **Data Engineering:** Raw data was cleaned, de-duplicated, and structured into a standardized tabular format to ensure calculation accuracy.
 2. **Analytical Framework:** **Pivot Tables** and advanced formulas (e.g., SUMIFS) were used to aggregate KPIs across categories, states, and timeframes.
 3. **Visual Architecture:** A professional UI was created by removing gridlines and utilizing **Pivot Charts**, including Maps for geographic analysis and Line charts for trend forecasting.
 4. **Interactive UX:** Integrated **Slicers** (Category, Year, Month) and **Hyperlinked Navigation** buttons to allow stakeholders to toggle between high-level summaries and granular data sheets seamlessly.
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3. Key Performance Insights

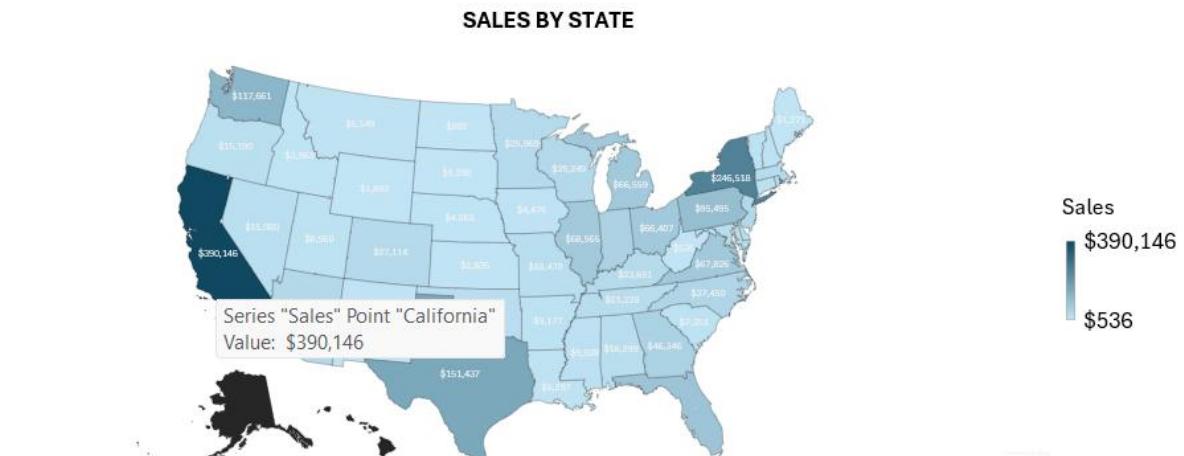
- Revenue Drivers: Technology** is the primary profit engine.



- Within sub-categories, **Phones** (\$277k+) and **Chairs** (\$271k+) are the top revenue generators.

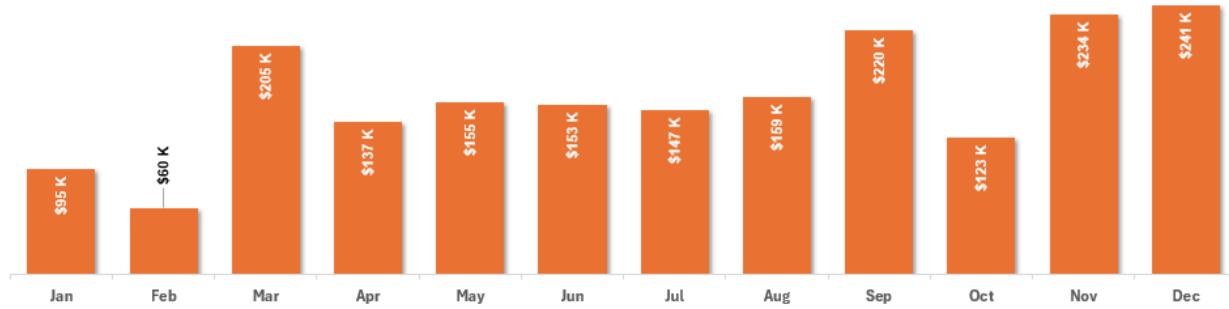


- Geographic Dominance: California** is the leading state by a significant margin (\$390,146 in sales), followed by New York and Texas.



- **Seasonal Trends:** Data reveals a consistent **Q4 surge**, with November and December accounting for the highest monthly sales volumes.

SALES BY MONTH



- **Customer Value:** A small group of elite customers, led by **Tamara Chand** (\$8,981 profit), contributes disproportionately to the bottom line.

TOP 5 CUSTOMER PROFIT



4. Strategic Recommendations

1. **Scalability:** Double down on **Technology** inventory and marketing, as it shows the highest consistent upward profit trajectory.
 2. **Efficiency:** Re-evaluate or phase out low-margin categories such as **Fasteners** and **Supplies** to optimize warehouse space and capital.
 3. **Regional Expansion:** Analyze the "California Model" to replicate its success in mid-tier states like Washington and Pennsylvania.
 4. **Retention:** Implement a "Key Account Management" program for the **Top 5 Customers** to ensure long-term loyalty and recurring high-margin revenue.
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