DEEP GRAM

DEEP GRAM Technology: Employee Performance & Sales Variance Dashboard

PREPARED BY

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Title

DEEP GRAM Technology: Employee Performance & Sales Variance Dashboard

Context

This project was developed for DEEP GRAM Technology to address the critical business need of monitoring sales performance. The company required a centralized, dynamic system to track progress towards annual revenue goals at the individual employee level, moving away from static, outdated reports.

Problem / Question

How can DEEP GRAM Technology's management effectively and proactively monitor individual employee sales

performance against annual targets to identify gaps, celebrate successes, and make timely, data-driven decisions on coaching and strategy?

Tools Used

· Power BI: For data visualization, dashboard development, and interactive reporting.
· DAX (Data Analysis Expressions): For creating advanced, custom metrics and time intelligence calculations.
· Power Query: For data transformation and preparation.

Process Walk-through

1. Data Preparation: Connected to the raw sales data source. Used Power Query to clean and transform the data, ensuring

consistency in employee names, dates, and sales figures.

2. Data Modeling: Established a proper data model by creating a dedicated, marked-as-date table. This is a crucial step for accurate time intelligence calculations.

3. DAX Calculations: Engineered the core metrics using complex DAX:
  · YTD Sales = TOTALYTD(SUM(Sales[Amount]), 'Date'[Date])
  · YTD Target = TOTALYTD(SUM(Targets[Target Amount]), 'Date'[Date])
  · Variance $ = [YTD Sales] - [YTD Target]
  · Variance % = DIVIDE([Variance $], [YTD Target])
  · Used CALCULATE and FILTER functions for more specific, context-aware calculations.

4. Visualization & Dashboard Design: Built visualizations like line charts for trends (YTD Sales vs. Target), bar charts for variance by employee, and KPIs for high-level summary.

5. Interactivity: Added slicers for Date, Employee, and Department to enable dynamic filtering and drill-down capabilities.

Key Findings

· The dashboard successfully identified top-performing employees who were exceeding their YTD targets by over 20%.

· It revealed specific employees and departments that were consistently behind schedule, allowing for early intervention.

· A key trend showed that performance variance was most significant in Q2,

indicating a potential seasonal or market-related issue.

Visuals with a Purpose

· Line Chart (YTD Sales vs. YTD Target): To show the cumulative performance trend over the year and highlight the gap visually.

· Clustered Bar Chart (Variance $ by Employee): To quickly identify who is above or below target and by how much in absolute terms.

· Matrix Table (with Monthly Data): To provide a detailed, granular view for deep analysis into specific months.

· Slicers (Department, Date): To empower users to filter the entire dashboard and isolate the data most relevant to them.

Main Takeaway

Management now has a single source of truth for sales performance. The dashboard transforms raw data into an actionable early-warning system, enabling proactive measures like targeted coaching for struggling employees or reallocating resources to capitalize on strengths, ultimately driving the company closer to its annual objectives.

What I Learned from this Case Study

· The critical importance of a robust date table for any time intelligence analysis in Power BI.
· How to leverage advanced DAX functions like TOTALYTD and CALCULATE to solve real-world business problems involving time-based comparisons.
· That the true value of a dashboard lies not just in displaying data, but in its

usability and ability to prompt specific actions.

Reflection and Next Steps

· Reflection: The project successfully met its core objective. A future enhancement would be to incorporate a "forecast" based on the current run-rate.
· Next Steps:
  1. Integrate additional data sources (e.g., marketing campaign dates) to correlate performance with external factors.
  2. Develop a similar dashboard for quarterly targets for more frequent check-ins.
  3. Create a "coaching notes" feature within the dashboard for managers to log interventions directly.

Invite Feedback

I am always looking to improve my analytical approach and storytelling. I would greatly appreciate your feedback!

· What aspect of the analysis do you find most compelling?
· How could the visualizations or metrics be improved to make them even more actionable?
· Is there any other dimension you would want to see analyzed in this context?

Actual Total Sales

$18.95M

YTD Actual Sales $2.44M --

Target Total Sales

$19.32M

YTD Actual Sales $2.44M

Variance

($366.86K)

YTD Variance ($112.70K)

Variance Pict Label

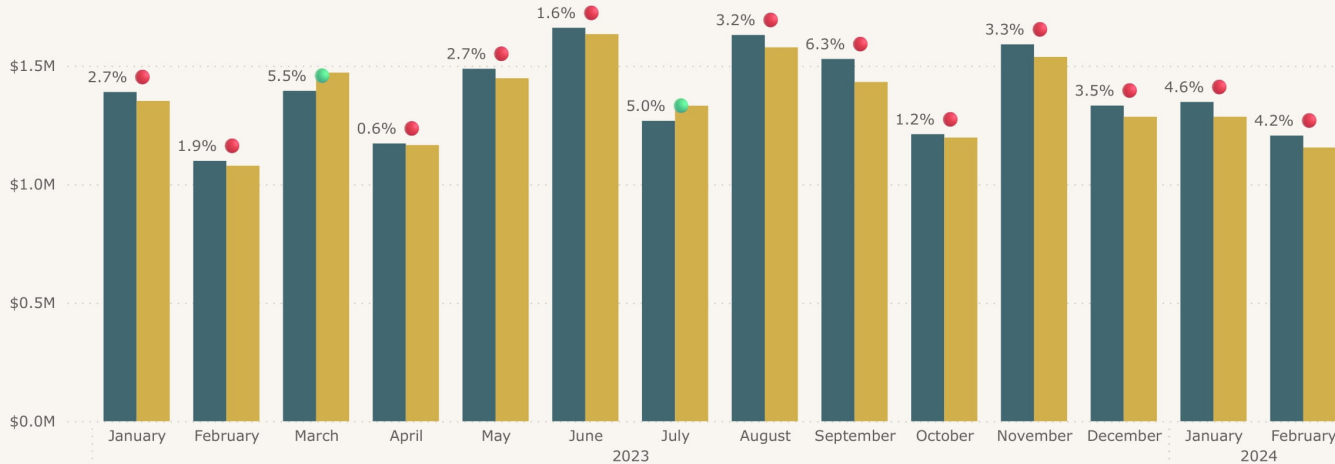# 1.9% 🔴

YTD Actual Sales $2.44M

Months Target...

2

We met the target 2 out of 14

● Target Total Sales ● Actual Total Sales

Picture	First Sales person ▲	Target Total Sales	Actual Total Sales	Variance Pict Label	Target Total Sales by Date
	Andria Kimpton	$1,524,000.00	$1,500.78K	1.5% 🔴	
	Barr Faughny	$787,200.00	$808.09K	2.7% 🟢	
	Beverie Moffet	$740,200.00	$760.24K	2.7% 🟢	
	Brien Boise	$848,100.00	$791.02K	6.7% 🔴	
	Camilla Castle	$1,719,200.00	$1,560.04K	9.3% 🔴	
	Ches Bonnell	$803,200.00	$760.56K	5.3% 🔴	
	Curtice Advani	$1,484,800.00	$1,494.43K	0.6% 🟢	
	Dennison Crosswaite	$775,500.00	$785.90K	1.3% 🟢	
	Dotty Strutley	$719,700.00	$708.28K	1.6% 🔴	
	Gigi Bohling	$1,433,800.00	$1,485.21K	3.6% 🟢	

Actual Total Sales (14.54% decrease) and Target Total Sales (13.24% decrease) both trended down between January 2023 and February 2024.

Across all metrics, Actual Total Sales had the most interesting recent trend and started trending down on November 2023, falling by 24.87% (382428) in 3 months.

Target Total Sales was trending up between January 2023 and September 2023 with a rise of 139300 but had a significant change in trend and dropped by 385000 starting November 2023.

Actual Total Sales jumped from 1,351,784.25 to 1,471,164.75 during its steepest incline between January 2023 and March 2023.

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