

Step 1 — Load Dataset

Power BI

1. Open Power BI Desktop
2. Click **Get Data** → **Text/CSV**
3. Select **Superstore.csv** → **Load**

Tableau

1. Open Tableau
 2. Choose **Text File**
 3. Select **Superstore.csv** → **Sheet 1**
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Step 2 — Identify the Story You Want to Tell

Ask yourself:

- **What matters to the business?**
 - Which products drive revenue?
 - Where is profit low despite high sales?
 - Which regions need optimization?
 - What is seasonal demand like?

Suggested Storyline for Superstore:

1. Sales & Profit Overview
 2. Category-Level Performance
 3. Sub-category Winners & Losers
 4. Regional Trends
 5. Customer and Order Patterns
 6. Shipping Mode & Delivery Performance
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Step 3 — Choose the RIGHT Charts

Below are the visuals that work best for Superstore data:

1 Sales & Profit Overview

Visuals:

- KPI Cards → *Total Sales, Total Profit, Profit Ratio*
- Line Chart → *Sales over time (trend)*

Insight to highlight:

“Sales increasing but profit margin fluctuating → possible discount issues.”

2 Category & Sub-Category Performance

Visuals:

- Bar Chart → *Sales by Category*
- Bar/Heat Map → *Profit by Sub-category*

Insight example:

“Technology drives revenue; Office Supplies shows thin margins.”

3 Region & Market Trends

Visuals:

- Map → *Sales by State/Region*
- Stacked Bar → *Profit by Region*

Insight example:

“West region strongest profits; Central region has profit loss areas.”

4 Customer & Segment Analysis

Visuals:

- Pie/Donut → *Segment share (Consumer, Corporate, Home Office)*
- Scatter Plot → *Sales vs. Profit per Customer*

Insight:

“Small % of customers contribute majority of profits.”

5 Shipping Mode Analysis

Visuals:

- Bar Chart → *Order count by Ship Mode*
- Line Chart → *Delivery time trend*

Insight:

“Standard class dominates orders; same-day orders growing.”

Step 4 — Add Context & Insights

Your visuals must **tell a story**, not just show numbers.

Add:

- **Annotations**
- **Callouts**
- **Titles that explain the insight**

Examples of good titles:

- “Sales by Category”
 - “Technology category outsells others by 35%”
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Step 5 — Build a Summary Storyboard

Create a final dashboard page or PDF slide:

Recommended Summary Slide Layout

◆ **Slide Title:** *Superstore Sales & Profit Insights (2023)*

◆ **Key Messages:**

- Sales rising but profit margin unstable
- Tech leads revenue; Furniture underperforms
- West region strongest; Central region weak
- High discounts directly correlate with low profit
- Opportunity: Reduce discounts on low-profit items