

Data-Driven Storytelling Presentation:

- J.P. Morgan Chase & Co. is a leading global financial services firm that offers services and operates worldwide.
- The company aims to analyze the account performance metrics over the last 5 years (2017-2021) and the factors contributing to its compound annual growth rate (CAGR) in unit sales. This includes identifying opportunities for further improvement.

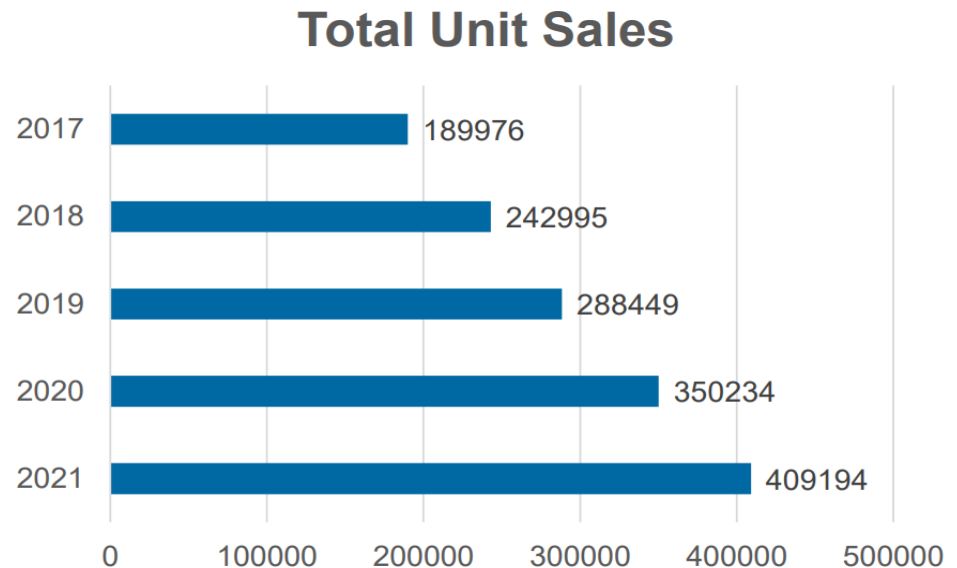
DATA MODELLING

Utilizing **Power Query in MS-Excel**, transformed the data for improved organization, giving a more structured foundation for necessary analysis

	Account Name	Region	Decision-Maker	Phone Number	Account Type	Product 1	Product 2	Product 3	Social Media	Coupons	Catalog Inclusion	Posters	5 YR CAGR	Year	Sales	P
7	MB 5	Bronx NY	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	225%	2017	73	
8	MB 5	Bronx NY	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	225%	2018	3485	
9	MB 5	Bronx NY	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	225%	2019	4592	
10	MB 5	Bronx NY	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	225%	2020	5143	
11	MB 5	Bronx NY	Bill Callahan	(617) 419-7996	Medium Business	Yes	Yes	No	Yes	No	Yes	No	225%	2021	8100	
12	OR 2	Yonkers NY	Raymond Heywin	(571) 843-1746	Online Retailer	Yes	Yes	Yes	Yes	Yes	Yes	No	181%	2017	138	
13	OR 2	Yonkers NY	Raymond Heywin	(571) 843-1746	Online Retailer	Yes	Yes	Yes	Yes	Yes	Yes	No	181%	2018	286	
14	OR 2	Yonkers NY	Raymond Heywin	(571) 843-1746	Online Retailer	Yes	Yes	Yes	Yes	Yes	Yes	No	181%	2019	6750	
15	OR 2	Yonkers NY	Raymond Heywin	(571) 843-1746	Online Retailer	Yes	Yes	Yes	Yes	Yes	Yes	No	181%	2020	8254	
16	OR 2	Yonkers NY	Raymond Heywin	(571) 843-1746	Online Retailer	Yes	Yes	Yes	Yes	Yes	Yes	No	181%	2021	8656	
17	WD 11	New York NY	Carlos Jackson	(201) 363-0653	Wholesale Distributor	Yes	Yes	Yes	No	No	Yes	No	165%	2017	128	
18	WD 11	New York NY	Carlos Jackson	(201) 363-0653	Wholesale Distributor	Yes	Yes	Yes	No	No	Yes	No	165%	2018	416	
19	WD 11	New York NY	Carlos Jackson	(201) 363-0653	Wholesale Distributor	Yes	Yes	Yes	No	No	Yes	No	165%	2019	747	
20	WD 11	New York NY	Carlos Jackson	(201) 363-0653	Wholesale Distributor	Yes	Yes	Yes	No	No	Yes	No	165%	2020	1028	
21	WD 11	New York NY	Carlos Jackson	(201) 363-0653	Wholesale Distributor	Yes	Yes	Yes	No	No	Yes	No	165%	2021	6357	
22	MB 12	Bronx NY	Mel Berkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	152%	2017	209	
23	MB 12	Bronx NY	Mel Berkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	152%	2018	621	
24	MB 12	Bronx NY	Mel Berkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	152%	2019	3098	
25	MB 12	Bronx NY	Mel Berkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	152%	2020	7118	
26	MB 12	Bronx NY	Mel Berkowitz	(967) 547-1542	Medium Business	Yes	Yes	No	Yes	Yes	Yes	No	152%	2021	8433	
27	MB 6	New York NY	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	142%	2017	238	
28	MB 6	New York NY	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	142%	2018	1235	
29	MB 6	New York NY	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	142%	2019	1822	
30	MB 6	New York NY	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	142%	2020	7074	
31	MB 6	New York NY	Anthony Brooks	(349) 801-7566	Medium Business	Yes	Yes	No	Yes	No	Yes	No	142%	2021	8207	
32	WD 2	New York NY	Craie Collins	(828) 840-2736	Wholesale Distributor	Yes	Yes	Yes	No	No	Yes	No	135%	2017	299	

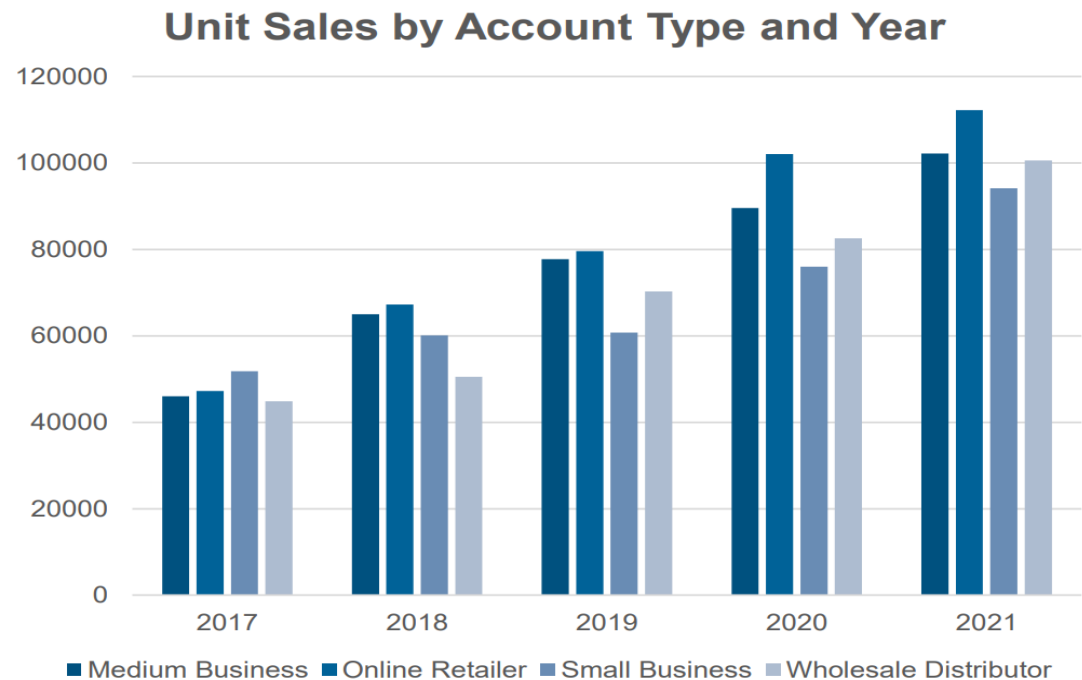
DATA ANALYSIS & VISUALIZATION

Overall, our unit sales growth has been good, with a **5- year CAGR of 21%**



DATA ANALYSIS & VISUALIZATION

Directing our sales resources and adjusting our sales mix towards online retailer accounts could lead to enhanced sales growth.

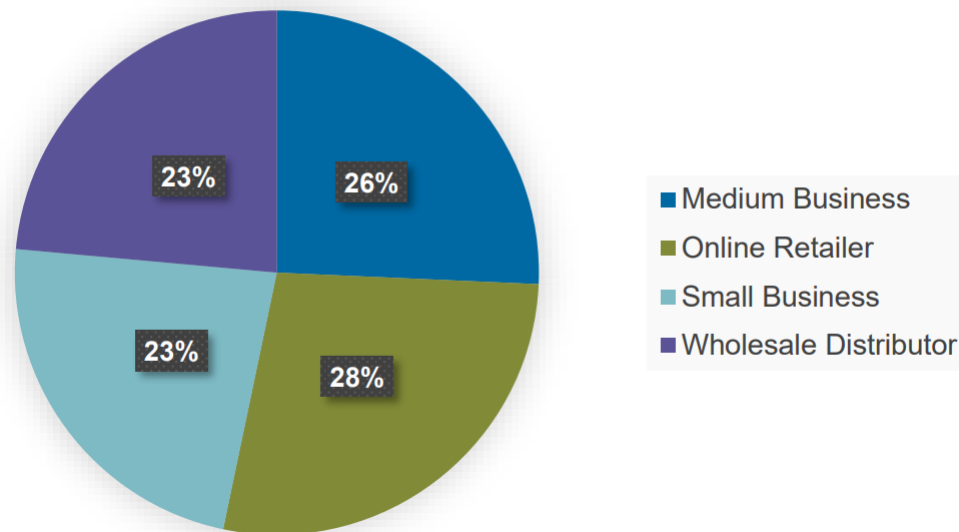


DATA ANALYSIS & VISUALIZATION

Online Retailer generated the highest sales volume, totaling **408,515 units**, which accounts for 28% of the total sales volume.

Medium Business followed closely with a sales volume of **380,568 units**, making up 26% of the total sales volume.

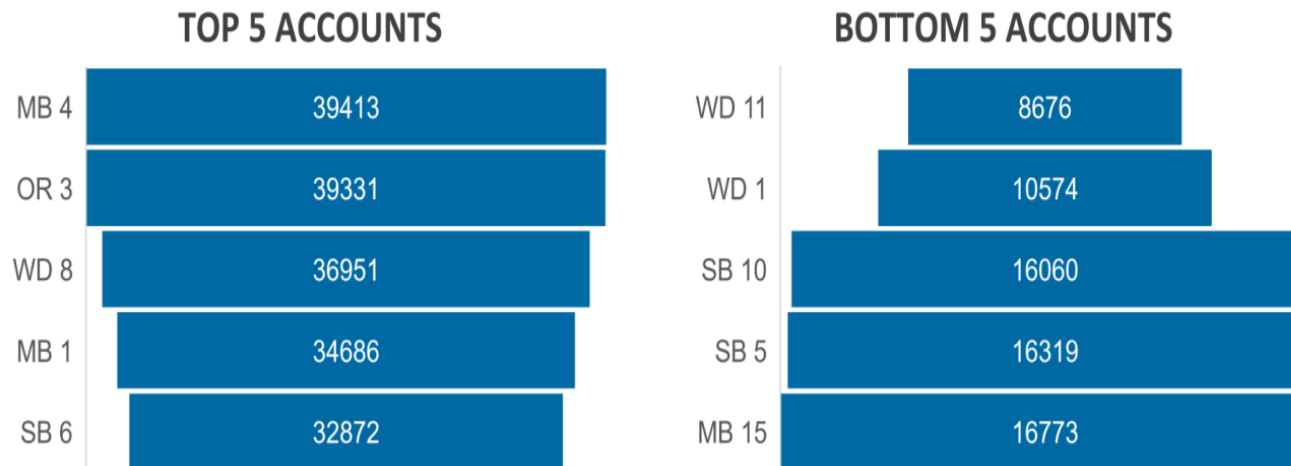
Sales by Account Type



DATA ANALYSIS & VISUALIZATION

The account name **MB4** proved to be the highest-performing account, achieving an impressive sales volume of approximately **39,413 units**.

On the other hand, accounts **WD11**, **WD1**, and **SB10** performed at the lowest level in terms of sales volume. Specifically, **WD11** accounted for **8,676 units**, **WD1** for **10,574 units**, and **SB10** for **16,060 units**, all in terms of sales volume



Summary

- Despite satisfactory overall sales performance, there is ample room for significant improvement.
- Discontinuing poorly performing accounts would free up valuable sales and marketing resources.
- Notably, the past five years have witnessed the most robust sales growth in the online retailer account category.
- By reallocating the resources saved from closing underperforming accounts to online retailer accounts, sales growth could be maximized.
- It is advisable to promptly close these underperforming accounts and launch an initiative to identify high-potential online retailer accounts deserving of increased sales and marketing focus.