

# Vision360 Business Analysis Project

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# **Agenda**

- Company Overview
- Business Case
- > Problem Statement
- Project Scope and Timeline
- Key Stakeholders
- > Assumptions & Constraints
- Key Performance Indicators (KPIs)
- ➤ Insights and Recommendations
- Lessons Learned
- Conclusion

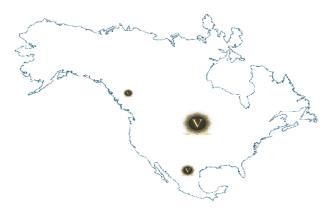
# ValueFrenzy Supermarket Chain Overview



- > Founded in 2006, specializing in Retail and Consumer Goods.
- > Operations: **USA**, **Mexico**, and **Canada** with a growing footprint of 200+ stores.
- Product range:
  - low-tier: Groceries
  - > medium-tier: Household Goods
  - high-tier: Electronics.

### > Strategic Pillars:

- > Strong focus on private label brands to boost affordability and loyalty.
- > Omnichannel strategy: Seamless integration of physical stores and online platforms to enhance customer experience.
- Committed to operational efficiency and sustainable growth initiatives.



## **Business Case**



- > Executive Summary
- Business Objectives
- > Solutions Considered
- > Financial Analysis
- > Impact Analysis
- Risk Analysis
- > Implementation Plan

# A Call for Help: Analyzing ValueFrenzy's Decline



- The Challenge: Revenue and profit have declined from 2021 to 2023, with the USA showing the most significant downturn.
- > Stakeholder Involvement: Sarah Jamieson, COO, initiated the analysis to understand underlying issues.

## Key Focus Areas:

- Assessing critical KPIs—Revenue, Profit, Quantity Sold, Transactions, and Average Transaction Value (ATV) segmented by regions and product-tiers.
- Analyzing customer purchase patterns and regional trends.
- > Business Objective: Identify root causes, uncover actionable insights, and recommend strategies for revenue recovery and sustainable growth.

# What's Included in the Analysis?



### In-Scope

- > Initial Business Case Validation: Assess challenges like revenue dips and regional disparities.
- ➤ Performance Analysis: Evaluate KPIs (Revenue, Profit, Quantity Sold, Transactions, ATV) across regions and product tiers (2021–2023).
- Customer Insights: Identify purchasing patterns, product preferences, and drivers of sales performance.
- > Trend Identification: Detect seasonal trends and significant periods of decline.
- > Stakeholder Engagement: Conduct requirements-gathering sessions and incorporate feedback to align solutions with organizational goals.
- ➤ Recommendations: Propose strategies for ATV recovery, customer engagement, and operational efficiency improvements.

### Out-of-Scope:

- Qualitative Data: Customer surveys or satisfaction studies.
- Detailed Operational Analysis: In-depth supply chain or internal operations review.

# **Four Phases (Sep 4 - Oct 2, 2024)**



- 1. Phase 1: Business Analysis Planning and Initial Preparation
  Stakeholder Meetings, Finalize KPIs, Data Collection, Initial Preparation
- 2. Phase 2: Data Preparation and Validation
  Data Cleaning, Validation, Preliminary Analysis, Business Case Refinement
- 3. Phase 3: In-Depth Analysis and Insights Development Comprehensive Analysis, Insights Development, Feedback & refinement
- 4. Phase 4: Deliverables and Stakeholder Presentation
  Final Deliverables, Internal review, Presentation, Handover & Follow-up

# **Key Performance Indicators**



## 1. Total Revenue

• Tracks regional and product-level income trends.

## 2. Gross Profit

Assesses profitability after deducting COGS.

## 3. Quantity Sold

Measures product demand and sales performance.

## 4. Total Transactions

Indicates customer activity and engagement.

## 5. Average Transaction Value (ATV)

Reflects customer spending behavior and upselling potential.

## **Rationale behind Selected KPIs**



- ➤ Alignment with Analysis Objectives
- ➤ Data Availability and Quality
- ➤ Simplicity and Actionability
- **Economic Context**
- ➤ Industry Best Practices
- ➤ Future Exploration

# The People Behind the Project



- Sarah Jamieson Chief Operating Officer (COO), Role: Project Sponsor
- David Lee Chief Financial Officer (CFO), Role: Financial Oversight
- Amanda Cole Head of Sales and Marketing, Role: Sales & Marketing Input
- Michael Rogers Regional Manager, Role: Regional Performance Evaluation (USA)
- Isabella Martinez Regional Manager, Role: Regional Performance Evaluation (Mexico)
- Ethan Carter Regional Manager, Role: Regional Performance Evaluation (Canada)
- Karen Blake Head of Product and Strategy, Role: Product Strategy and Innovation
- Nitin Kunigal Consultant, Role: Business Analyst and Liaison

# **Assumptions**



- Business Continuity
- ➤ Macroeconomic Stability
- Regional Sales Consistency
- Comparable Store Operations
- ➤ Market Position Stability
- Product Portfolio Stability
- ➤ Predictable Consumer Trends

## **Constraints**



- ➤ Limited Time Frame
- Data Granularity
- Regional Variability
- > Tool Limitations
- ➤ Operational and Supply Chain Data Exclusion
- ➤ Limited External Context
- > Stakeholder Availability
- ➤ Unpredictable Events
- ➤ No Access to External Consumer Insights



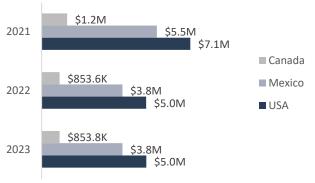
# **Insights and Recommendations**

# **Total Revenue (2021-2023)**

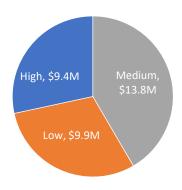


Revenue (Across all Regions): \$33.1M – USA (51%), Mexico (40%), Canada (9%)





Low and High-Tier contribute SIMILAR
Revenue and need Granular Attention



REVENUE DECLINED From \$13.8M in 2021 to \$9.7M in 2022 & 2023, impacted by ATV DROP.

Specifically, REVENUE DECLINED from \$1.4M to \$793.6K between Dec-2021 & Jan-2022

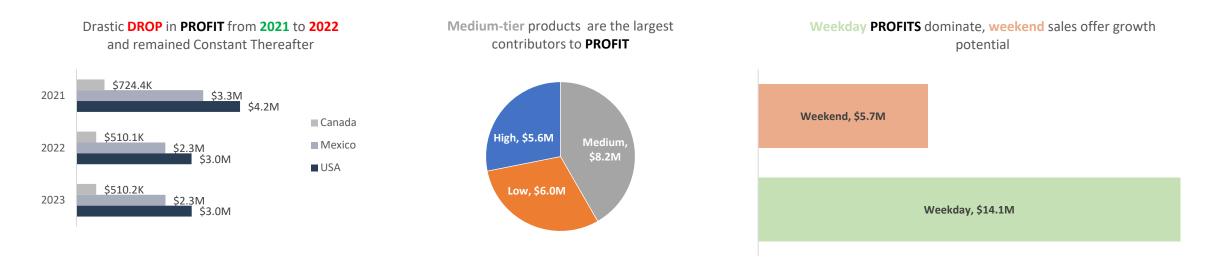


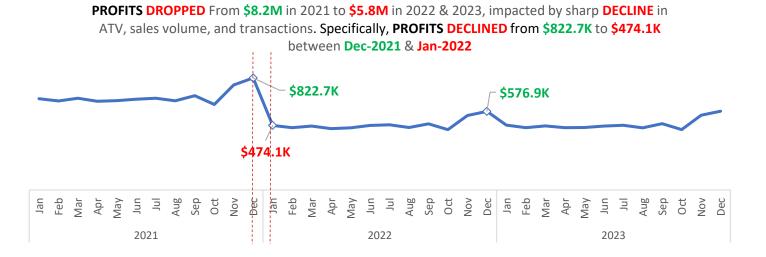
Jan Peb Mar Apr May Jun Jul Aug Sep Oct Nov	Jan Mar Apr May Jul Aug Sep Oct Nov	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov
2021	2022	2023

# **Gross Profit (2021-2023)**



Profit (Across all Regions): \$19.8M – USA (51%), Mexico (40%), Canada (9%)



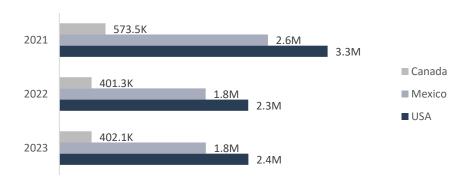


# **Quantity Sold (2021-2023)**



#### Total Quantity Sold (Across all Regions): 15.7M – USA (51%), Mexico (40%), Canada (9%)

Drastic **DECLINE** in **QTY SOLD** from **2021** to **2022** and remained Constant Thereafter

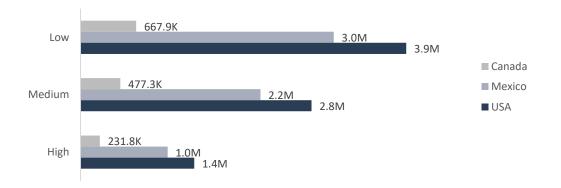


High Tier Products contribute towards LOWEST QTY SOLD. A significant DROP in the Overall QTY SOLD (especially, in low-tier products) from Dec-2021 to Jan-2022

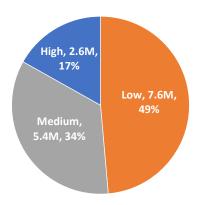


Mexico (40%) has Great Potential Competing with the USA (51%).

Medium-Tier (34%) show Great potential while High-Tier Needs Attention



**17%** of **High-Tier** units sold, despite having the highest ATV, Needs Granular Attention

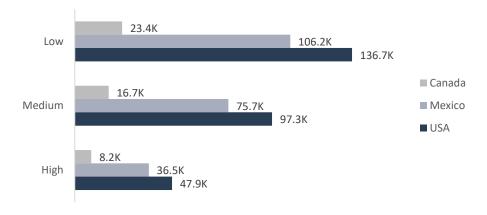


# **Total Transactions (2021-2023)**

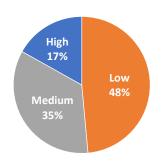


#### Total Transactions: 548,649 – No Change in YoY Transaction Volume across regions and product tiers

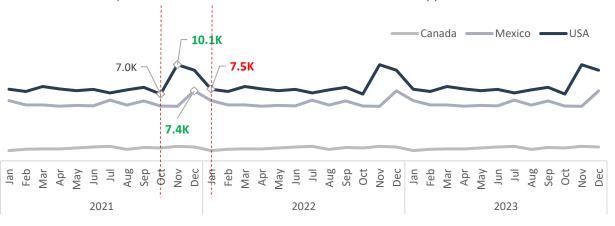
Strong Customer Engagement in Mexico (40%) despite its Market Size. Medium-Tier (35%) shows Great potential While High-Tier Needs Attention



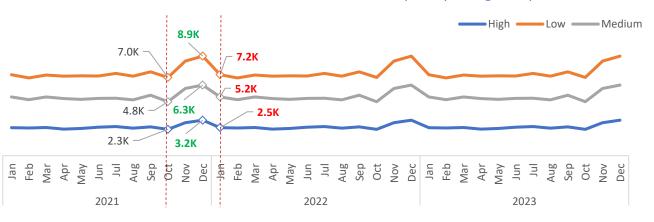
Low-tier (48%) dominate, medium-tier (35%) stable, high-tier (17%) low volume but high value and needs attention



Sharp **DECLINE** in transaction volume from late 2021 to early 2022 (mainly, in the USA). Mexico showed SEASONAL PEAKS in Nov-Dec as Opposed to the USA



**DROP** in transaction volume from late 2021 into 2022, especially for high-tier products



# Average Transaction Value/ ATV (2021-2023)



ATV (Across Regions): Canada (\$60.45), USA (\$60.40), Mexico (\$60.33)

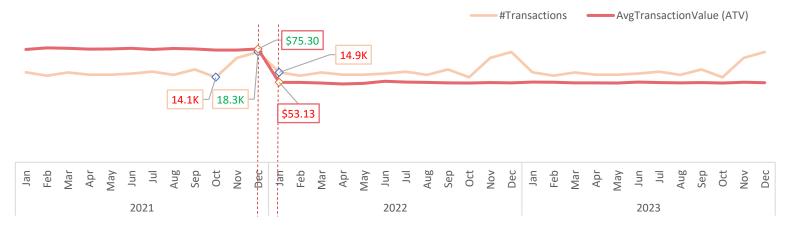




Low-tier products have the LOWEST ATV, high-tier products the HIGHEST, but with FEWER Transactions



Sharp ATV DROP from \$75.30 to \$53.13 between Q4-2021 to Q1-2022. ATV remained consistent across regions and product tiers due to STABLE PURCHASING PATTERNS. Despite a TRANSACTION INCREASE in late 2021, ATV remained steady, driven by FREQUENT low-tier purc



## **Lessons Learned**



- 1. Data Preparation and Cleaning
- 2. Working with Real-World Business Data
- 3. Defining Key Metrics and KPIs
- 4. Data Modeling and DAX Measures in Power Pivot
- 5. Dashboard Design and Presentation
- 6. Stakeholder Collaboration and Feedback
- 7. Time Management and Agile Approach

## CONCLUSION



- ➤ Business analysis uncovered revenue decline, profit gaps, and regional disparities (2021–2023).
- ➤ Key challenges: economic shifts, changing customer behaviors, and operational inefficiencies.
- ➤ Growth opportunities: regional strategies, private label focus, and tailored promotions.
- Analysis supports data-driven decision-making by validating business case assumptions and aligning solutions with strategic goals.
- Recommendations aim to optimize operations, boost profitability, and ensure long-term growth.