Production and Sales Performance Dashboard

Project Summary

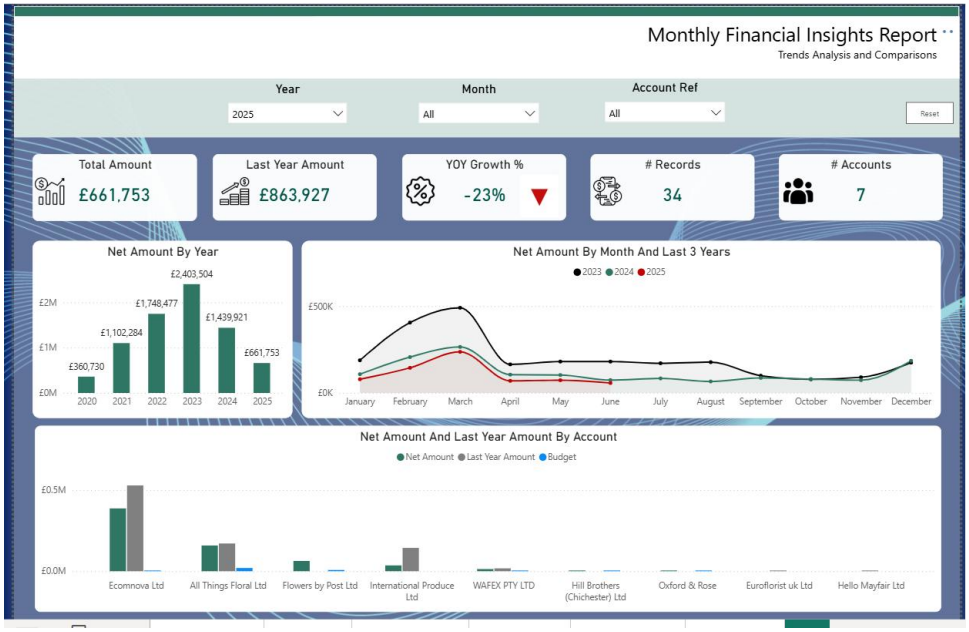
This Power BI report provides an integrated, decision-focused view of an organisation's financial performance, sales operations, and production efficiency. By combining historical comparisons, time-based trends, and variance analysis, the report enables leadership to quickly identify revenue decline, sales volatility, and cost inefficiencies. The dashboards are designed for executive consumption, balancing high-level KPIs with drill-down capability to support both strategic and operational decision-making.

2. General Tech Stack Used

- Power BI Desktop: Data modeling, DAX measures, and report development
- Power BI Service: Report publishing and stakeholder access
- Power Query (M): Data cleaning, transformation, and shaping
- DAX: Time intelligence, KPIs, variance, and comparative metrics
- Data Sources: CSV and ERP integration
- Visualization Features: KPI cards, slicers, conditional formatting, combo charts, gauges

Page 1 – Monthly Financial Insights

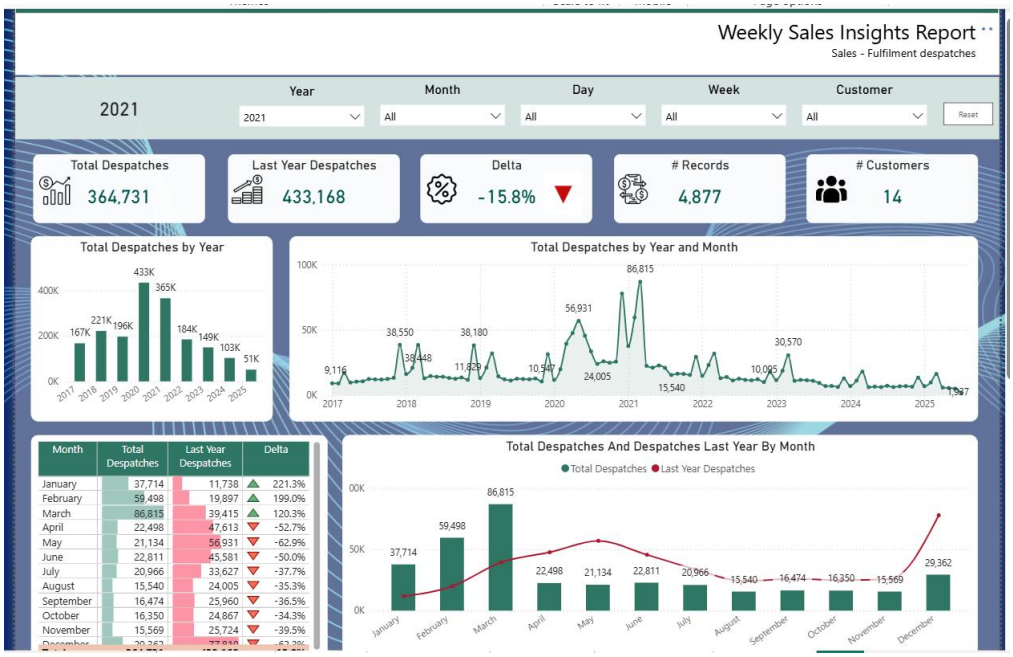
This page presents a high-level view of monthly financial performance, focusing on net amounts, year-over-year comparison, and revenue trends across accounts. It enables executives to assess current financial health and quickly identify declining or growing revenue patterns. The month slicer helps for a month-to-month drill down.



- **Total Amount KPI:** Communicates the total net financial amount for the selected period
- **Last Year Amount KPI:** Displays the comparable amount from the previous year using time intelligence. DAX functions such as SAMEPERIODLASTYEAR are likely used.
- **YoY Growth % KPI:** Highlights year-over-year growth or decline. Conditional formatting (red arrow) visually emphasizes negative performance.
- **Records KPI:** Indicates data volume and coverage for transparency and data validation. Derived using a COUNT or COUNTROWS DAX measure.
- **Accounts KPI:** Shows the number of active accounts contributing to revenue assess.
- **Net Amount by Year (Bar Chart):** Communicates long-term financial trends and historical growth or decline. Uses aggregated DAX measures grouped by year.
- **Net Amount by Month – Last 3 Years (Line Chart):** Compares seasonal and monthly patterns across multiple years. Relies on a Date dimension and time-based filtering.
- **Net Amount vs Last Year by Account (Clustered Bar Chart):** Identifies top-performing and underperforming accounts by comparing current performance against last year. Likely uses multiple DAX measures and legend-based comparison.

Page 2 – Weekly Sales Insights

This page focuses on sales execution and fulfillment performance, analysing dispatch volumes over time and comparing current results against historical benchmarks. It supports monitoring of demand trends, operational stability, and customer activity.



- **Total Dispatches KPI:** Shows total fulfilled dispatch quantity for the selected period.
- **Last Year Dispatches KPI:** Provides a benchmark against prior-year performance using time intelligence logic.
- **Delta % KPI:** Quantifies percentage change versus last year. Conditional formatting visually flags performance decline.
- **Records KPI:** It highlights how many sales records are assessed. It Reflects the transactional granularity of the dataset and reporting robustness.
- **Customers KPI:** Shows active customer count, supporting customer concentration analysis.
- **Total Dispatches by Year (Column Chart):** Summarises long-term sales volume trends across years.
- **Total Dispatches by Year and Month (Line Chart): Displays** volatility and spikes in dispatch volumes, enabling seasonality and disruption analysis.
- **Monthly Dispatch Table with Delta:** Provides detailed month-level comparison with conditional formatting to highlight positive and negative changes.
- **Total vs Last Year Dispatches by Month (Combo Chart):** Combines bars and lines to clearly contrast actual performance against historical benchmarks.

7. Page 3 – Cost of Production

This page evaluates production efficiency and cost control by comparing actual production costs against budget, while highlighting operational productivity metrics. It supports cost management and profitability optimisation.

- **Total Sales KPI:** Shows total production output or sales volume, providing scale context.
- **Average Cost per BQT KPI:** Measures production efficiency at a unit level. Calculated using a ratio-based DAX measure.
- **BQT per Hour KPI**: Communicates labour productivity and throughput efficiency.
- **Average Hourly Rate KPI:** Highlights labour cost trends and wage efficiency.
- **Budgeted vs Actual Production Costs (Gauge):** Provides an immediate visual indication of cost overrun or underrun. Gauge thresholds and conditional colouring enhance executive interpretation.
- **Total Sales by Customer (Bar Chart):** Identifies customers driving production demand and revenue contribution.
- **Production Costs by Year and Month (Clustered Column Chart):** Tracks cost trends over time and highlights deviations from budget.
- **Production Costs by Customer (Horizontal Bar Chart):** Surfaces high-cost customers and supports cost allocation decisions.
- Business Use Case & Benefits

This Power BI report enables leadership to move from reactive reporting to proactive decision-making. Finance teams can monitor revenue decline early, sales managers can detect fulfillment volatility, and operations leaders can control production costs before overruns escalate. The integrated design supports cross-functional alignment, improves financial forecasting, enhances cost efficiency, and ultimately drives profitability through timely, data-driven actions.