



# COURSE ONE – EXCEL FUNDAMENTALS

## Practice File

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### **Case Study:**

**1. Return Analysis:** How many orders were returned, and what percentage of total orders does this represent and Calculate the total loss due to returns in terms of both sales revenue and profit.

**2. Shipping Efficiency:** Analyse the average time it takes for orders to be shipped (Ship Date - Order Date) for each shipping mode and Identify which shipping mode has the fastest and slowest delivery times.

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**3. Customer Segmentation:** Segment customers based on their purchasing behaviour (e.g., total sales, frequency of orders) and Analyse the profitability of each customer segment and identify the most valuable segments.

**4. Product Performance:** Determine the top-selling product categories and sub-categories based on total sales and Calculate the average profit margin for each product category and sub-category.



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**5. Regional Analysis:** Compare sales performance across different regions and identify regions with the highest and lowest sales and Analyse the profitability of orders in each region and determine if there are any regional trends affecting profitability.

**6. Discount Analysis:** Investigate the impact of discounts on sales and profitability and Calculate the correlation between the discount rate and the quantity sold, as well as the discount rate and profit margin.

**7. Market Expansion:** Identify potential new markets for expansion based on regions with low market saturation and high growth potential and Develop a strategy to penetrate these new markets and increase market share.

**8. Customer Retention:** Determine the customer retention rate by analysing repeat orders from existing customers and Develop strategies to improve customer retention and increase customer lifetime value.

**9. Dashboard Building:** Build an interactive excel dashboard for the given dataset, find the guidelines to build the dashboard:

- Determine the purpose of the dashboard and what insights do you want to extract from the data?
- Review the dataset columns and identify key metrics relevant to your objectives. These could include total sales, profit, return rates, shipping efficiency, customer segments, etc.



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- Select appropriate chart types to represent your data effectively.

Common choices include bar charts, line charts, pie charts, and tables.

Use charts that best convey the insights you want to communicate.

- Organise your dashboard in a logical and intuitive manner. Ensure that text is readable, and visualisations are clear and understandable. Use colours and formatting consistently.
- Test your dashboard to ensure it functions as intended and provides meaningful insights.