

Sales Performance Case Study – Sales Dataset (Mantra Data Labs)

1. Executive Summary

This case study presents a comprehensive sales performance analysis conducted by Mantra Data Labs for a national distributor using Microsoft Excel. The objective was to transform three years of transactional data (2022–2024) into a dynamic and interactive dashboard that enables management to monitor performance trends, evaluate category and brand growth, and assess the effectiveness of promotional activities.

The analysis focused on integrating large-scale sales records across multiple regions, channels, and product categories to identify the key drivers of business performance. Using Excel's advanced functions, PivotTables, and visual analytics, the raw data was cleaned, structured, and translated into actionable insights.

2. Learning Objectives

1. Clean and standardize retail transaction data using Power Query.
2. Engineer new analytical features (Year, Month, Revenue).
3. Build PivotTables and charts for category, brand, and regional performance.
4. Design a professional one-page dashboard with slicers and KPI cards.
5. Use Excel Copilot to accelerate data transformations and reporting.

3. Business Context

The client operates nationally across multiple regions and channels (Retail, E-commerce, Discount). Leadership needs a unified view of

what's selling, where, and how promotions and execution (stock, delivery) interact with sales. The deliverable is a **dynamic Excel dashboard** that updates automatically with new data, summarizes performance, and supports decisions on assortment, promotion design, and regional/channel strategy.

4. Prerequisites

- **Excel** (Microsoft 365 recommended), with **Power Query** and **Pivot** features enabled.
- (Optional) **Excel Copilot** for faster transformations and auto-summaries.
- Basic familiarity with PivotTables/Charts, slicers, and cell formulas.

5. Dataset Overview

Dataset Source period: 2022–2024 ([Sales_Dataset](#))

Columns (used as-is):

- **date** (transaction date)
- **sku, brand, segment, category, pack_type**
- **channel** (Retail, E-commerce, Discount), **region** (PL-South/PL-North/PL-Central, etc.)
- **price_unit** (₹ per unit)
- **units_sold, delivered_qty, stock_available, delivery_days**
- **promotion_flag** (0/1)

Derived columns (added in Excel / Power Query):

- **Year** = YEAR([date])
- **Month** = MONTH([date])
- **MonthName** = TEXT([date],"mmm")
- **revenue** = units_sold * price_unit

Keep analysis **faithful to these columns** (we're not inventing discount/profit measures).