

Transaction Trends Across Four Years

Finance

Ordes

Customers

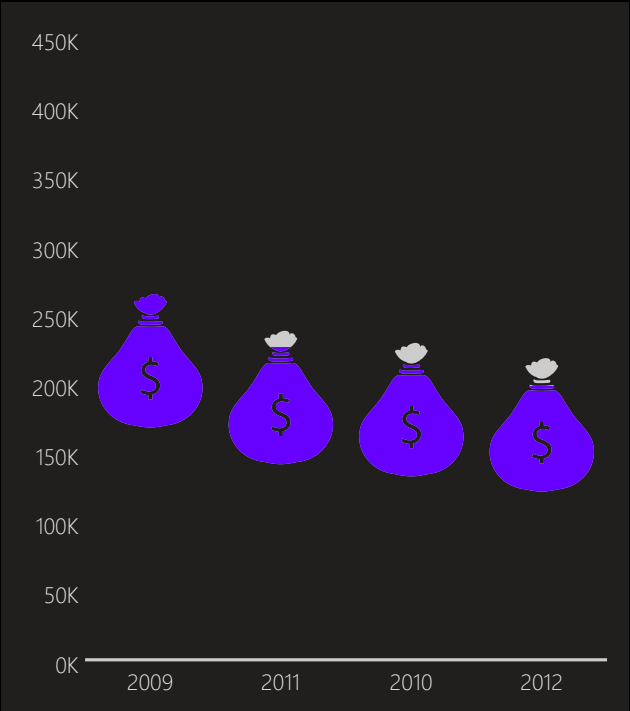
Products

Conclusion

The dataset used in this report contains transaction-level sales data for a company, covering the years 2009 to 2012.

Each row represents an individual sales transaction, uniquely identified by a **Row ID**, and includes detailed information about the **order** (such as order date, priority, quantity, and shipping), the **customer** (name, location, and segment), and the **product** (category, sub-category, pricing, and margin).

This report aims to analyze patterns, uncover inefficiencies, and provide actionable insights into the company's **order fulfillment**, **profitability**, **customer behavior**, and **product performance** across time.





Total Profit

1.52M

Total Sales

14.92M

Total Transactions

5.496K

Average of Discount

5%

Total Cost

15.62M

Year

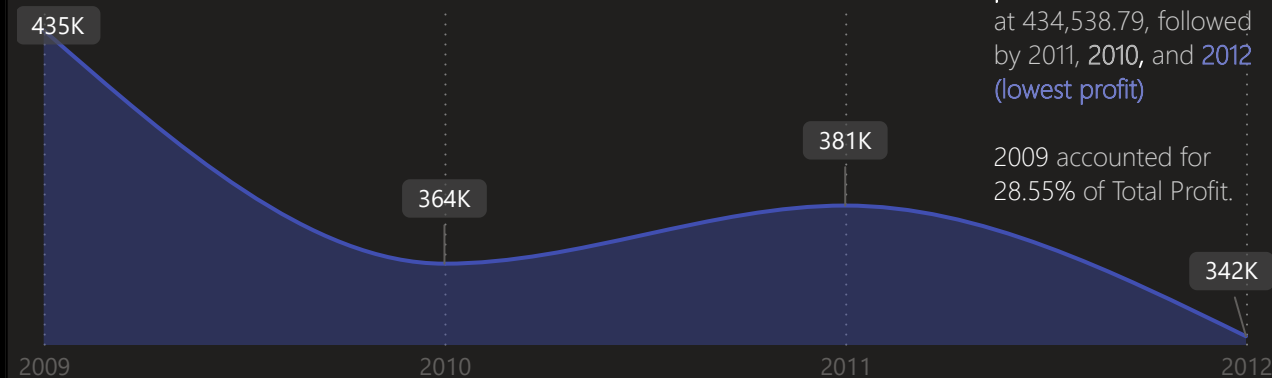
2009

2011

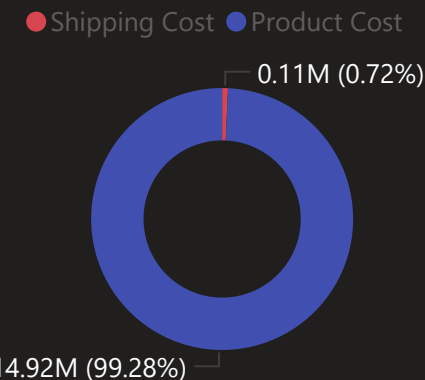
2010

2012

Total Profit Over The Years



Shipping Cost Vs Product Cost



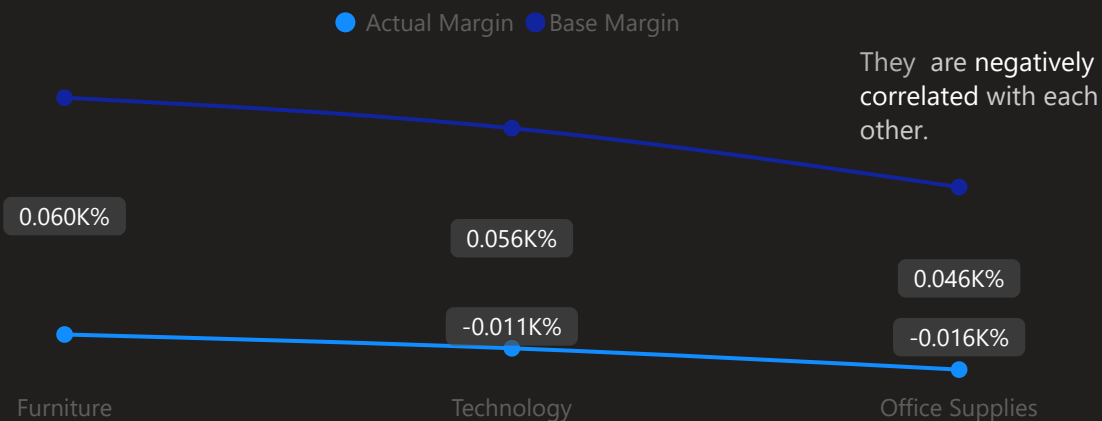
Profit Delta

5.39K

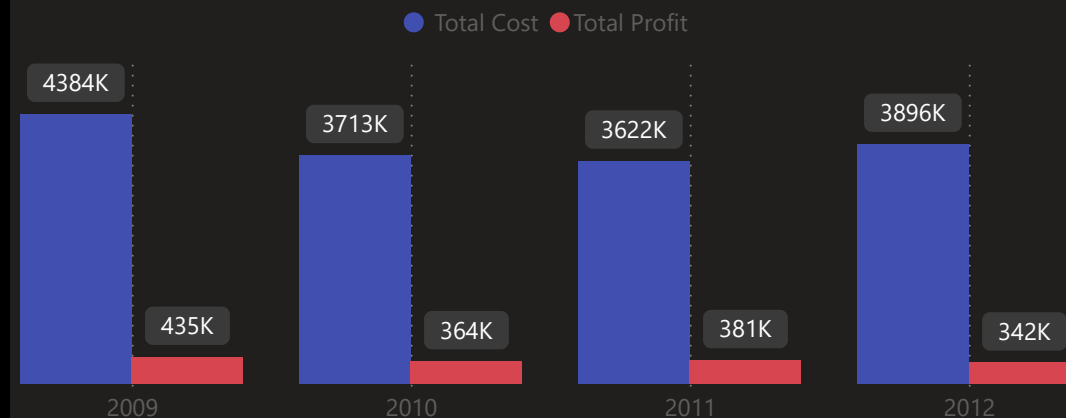
Shipping Cost

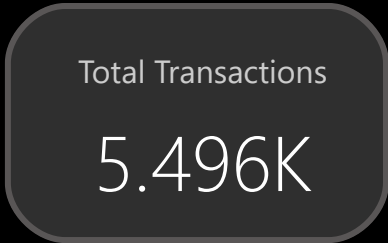
107.83K

Average Actual Margin Vs Average of Base Margin



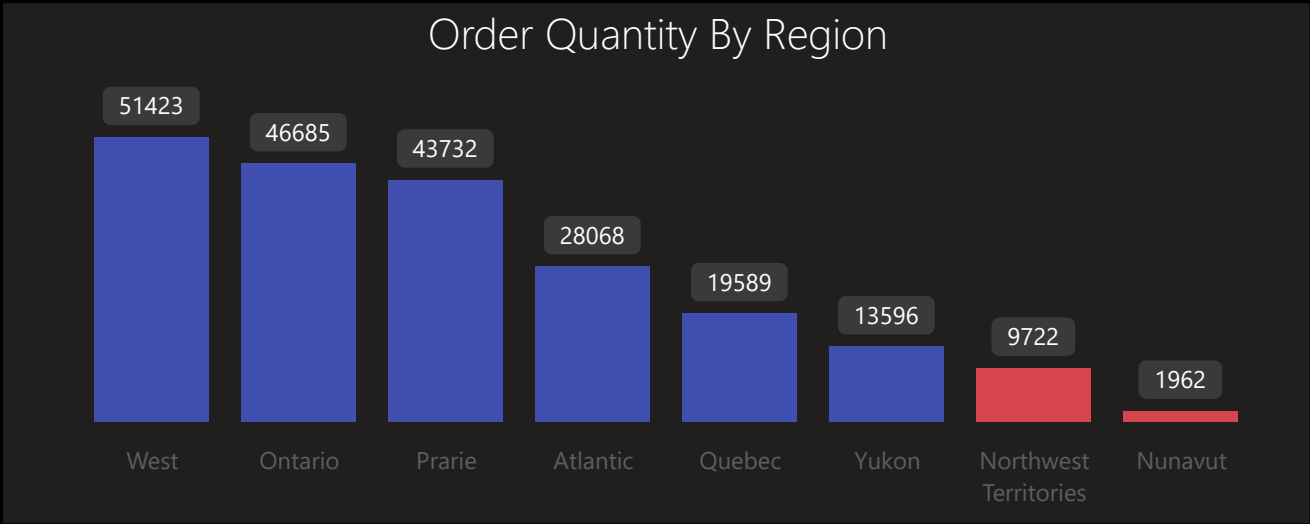
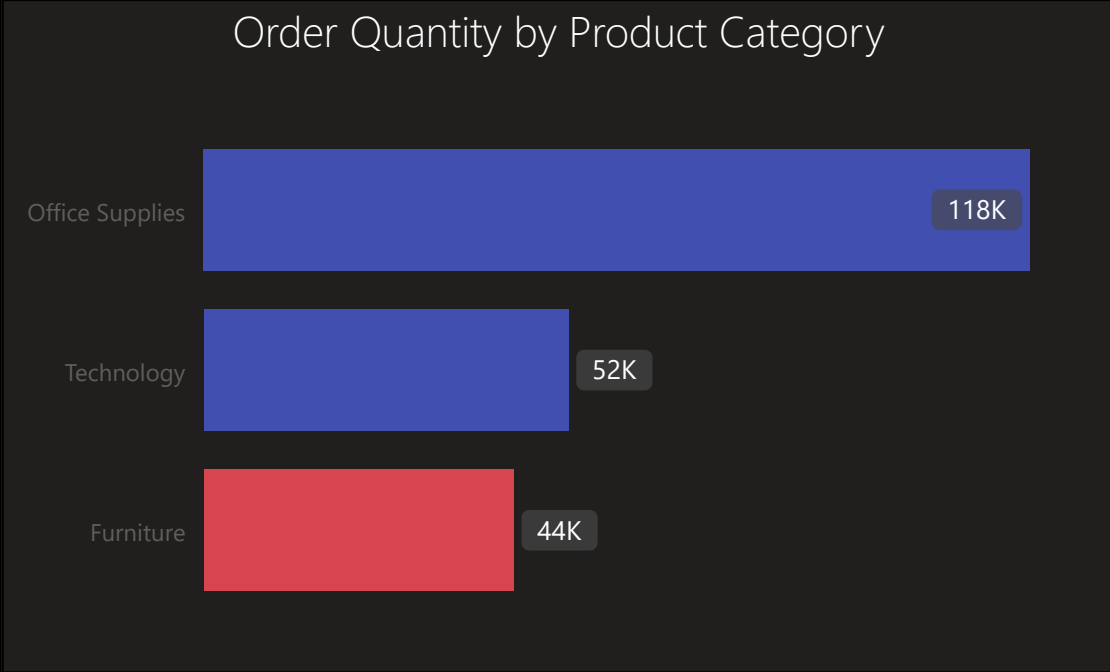
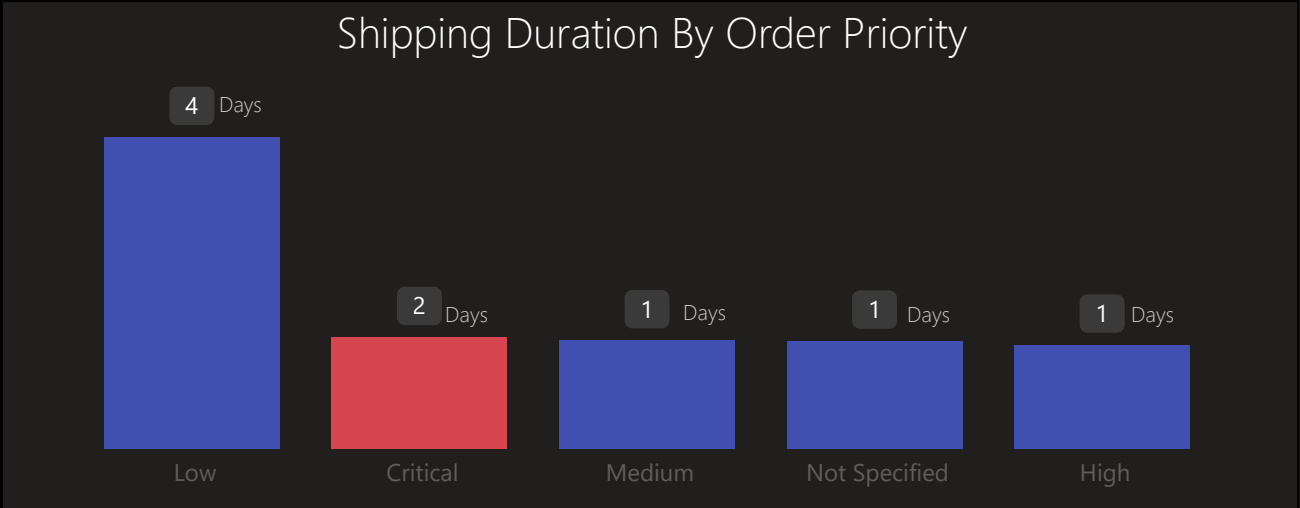
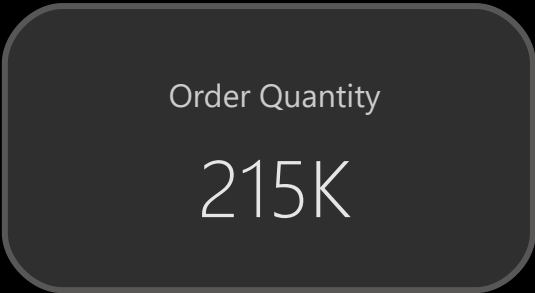
Cost Vs Profit by Year





Year

2009	2011
2010	2012



Customer Segment

☐

Consumer

☐

Corporate

☐

Home Office

☐

Small Business

Total Profit

1.52M

Total Sales

14.92M

Total Transactions

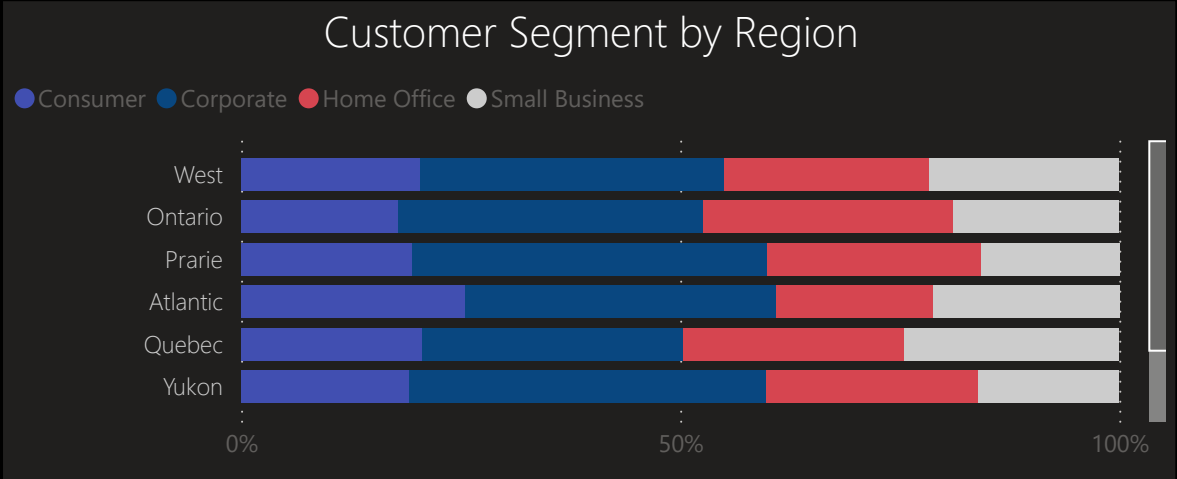
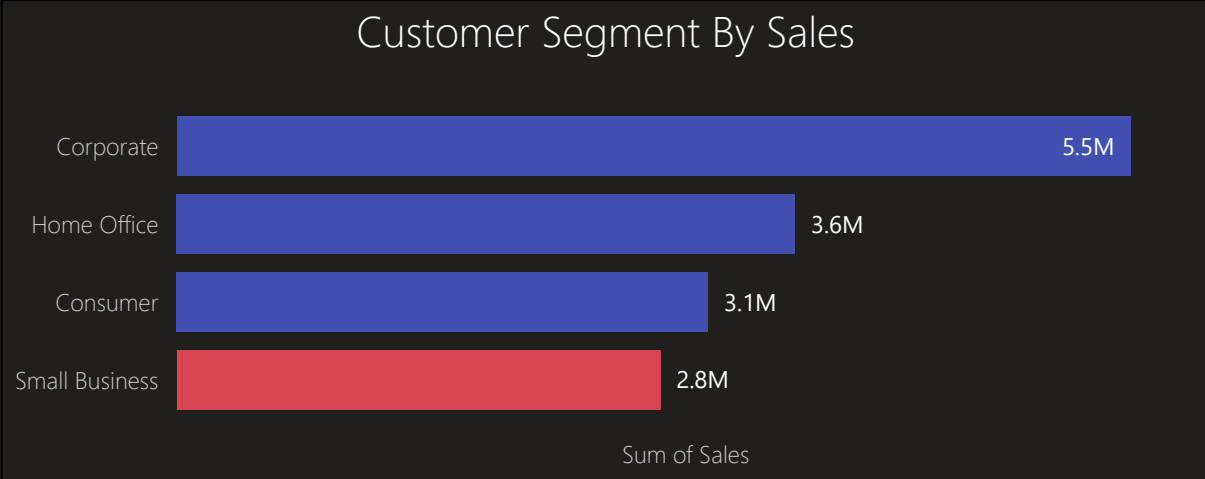
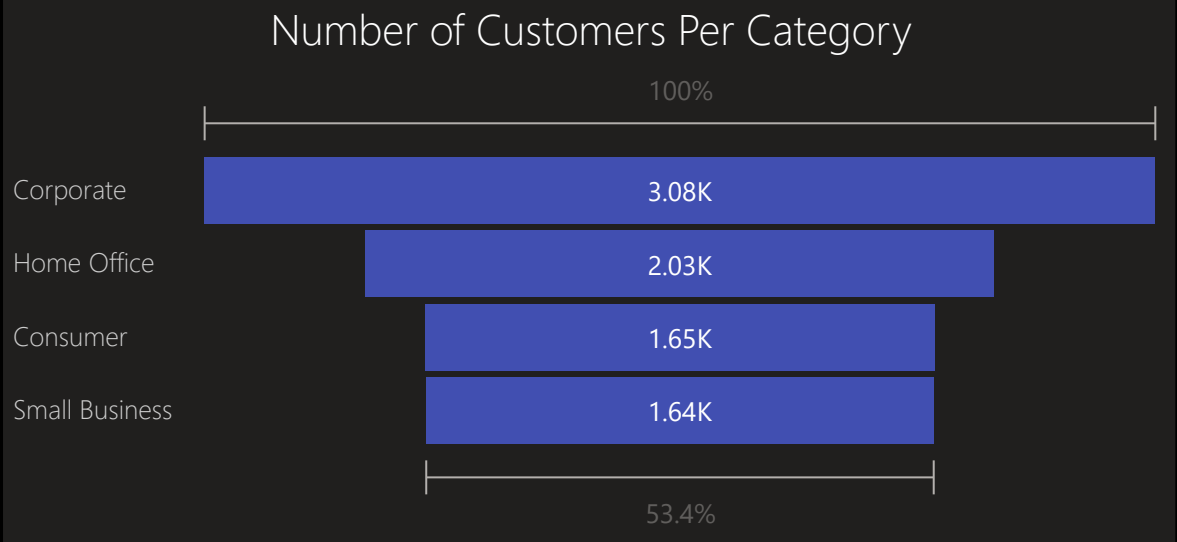
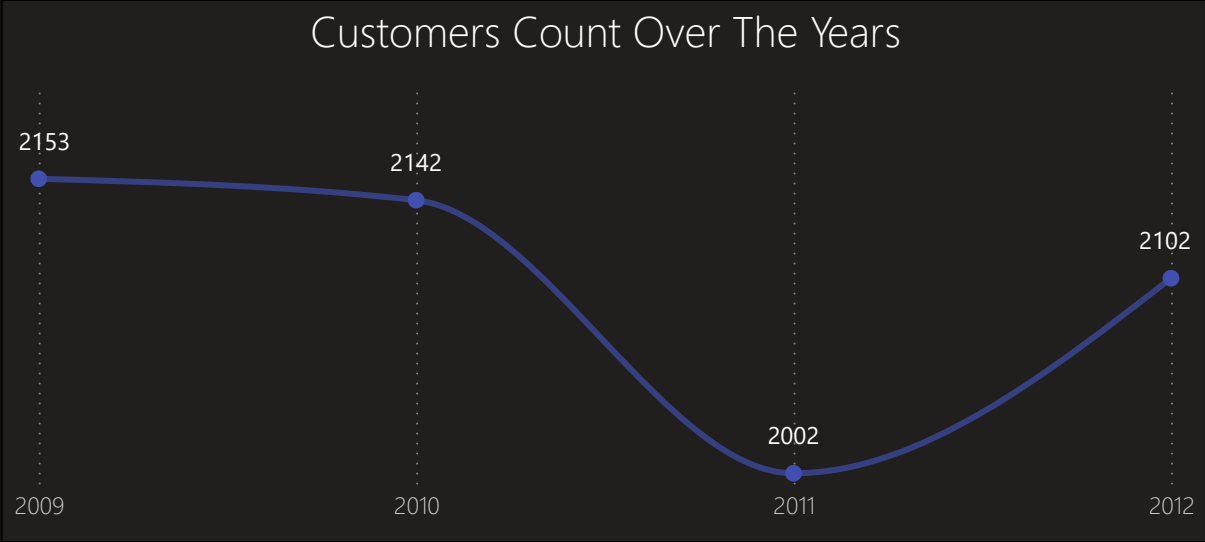
5.496K

Average of Discount

5%

Total Cost

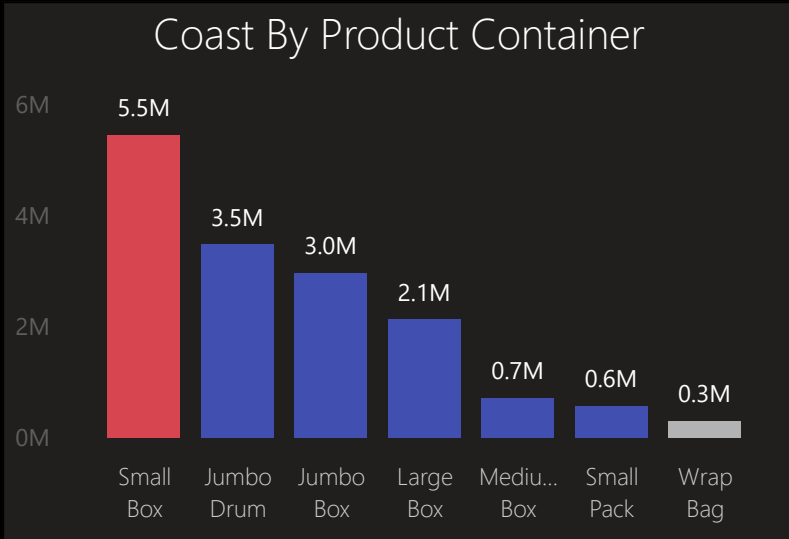
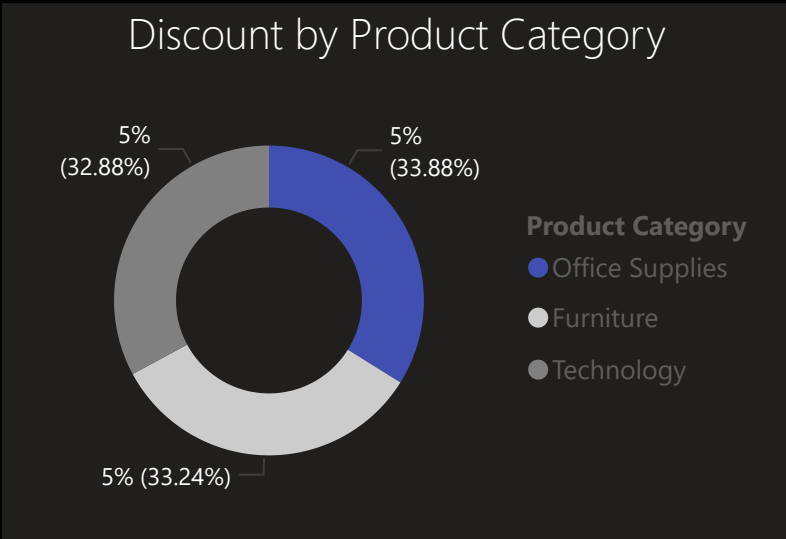
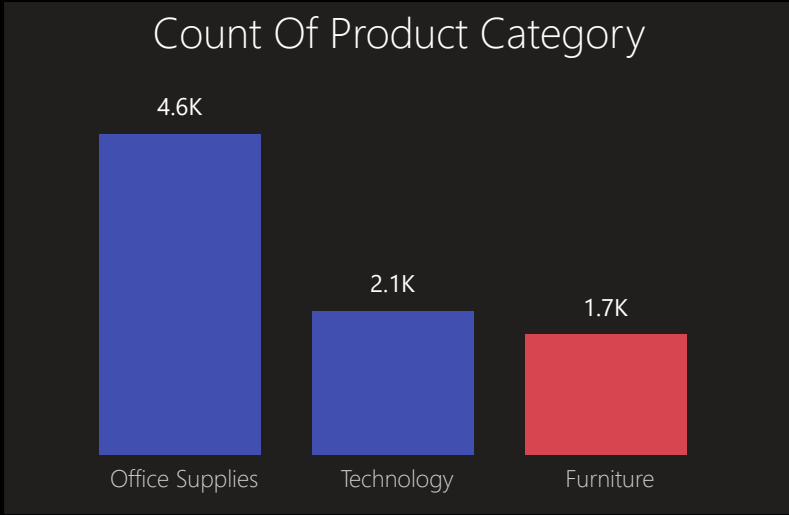
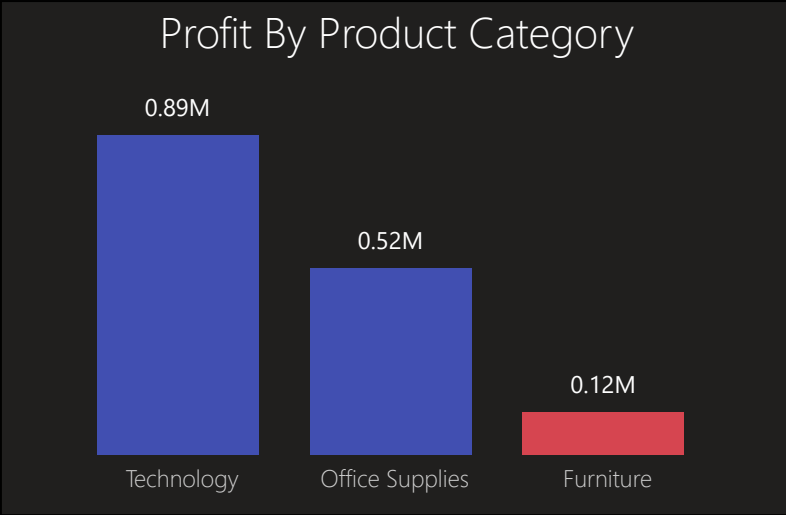
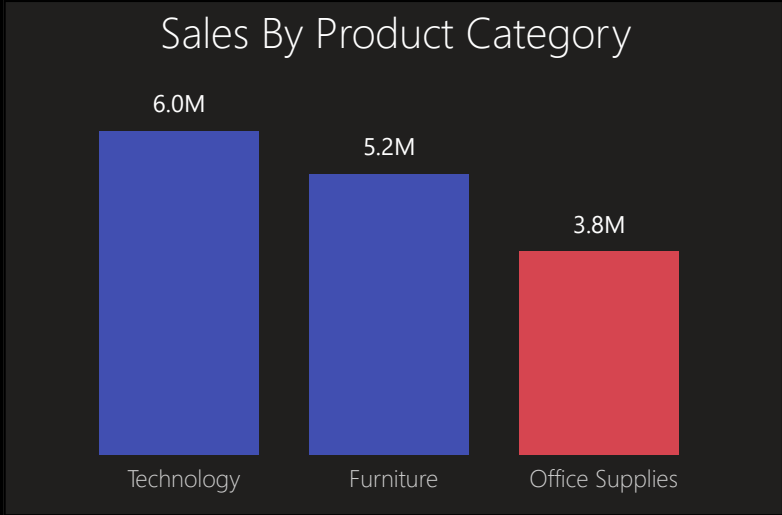
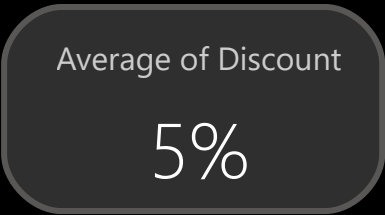
15.62M



Year



2009	2011
2010	2012



Insights

Total Profit Over the Years : The company reached its peak profit in 2009 with **\$4.035M**. Profit declined significantly in the following years, reaching the lowest in 2012 with **\$342K**.

Shipping Cost vs Product Cost : **Product cost** accounts for **99.28%** of total cost. **Shipping cost** contributes only **0.72%**, indicating minimal impact on overall cost.

Actual Margin vs Base Margin : These metrics show a **negative correlation**, indicating that as one increases, the other tends to decrease—this needs deeper investigation.

Cost vs Profit by Year : In every year, **costs exceed profits**, with a particularly concerning gap beginning in 2009.

Shipping Duration by Order Priority : **Low priority** orders take **4 days** to deliver. **Critical orders** take **2 days**, while medium, high, and not specified priorities take only **1 day**.

Order Quantity by Product Category : **Office Supplies** dominate with **118K** units ordered, followed by **Technology** and **Furniture**.

Order Quantity by Region : **West region** leads in orders, while **North-Vet** and **Non-Vet** territories have the lowest.

Customer Trends Over Time : Customer count stayed stable around **2K** across years. Lost ~100 customers in 2011, regained them in 2012.

Customer Segment by Category : **Corporate** has the highest number of customers. **Small Business** has the least.

Customer Segment by Sales : **Corporate** customers generate the highest sales, aligning with their population size.

Customer Segment by Region : **Home Office** and **Small Business** segments are underperforming across all regions.

Product Category Performance : **Technology** leads in **sales and profit**. **Office Supplies** has the highest number of **items sold**.

Shipping Duration by Product : Shipping duration is **similar** across all categories (average of 2 days).

Average Discount by Product Category : All categories have a consistent average discount of **5%**.

Cost by Product Container : **Small box** is the most expensive container. **Wrap bags** are the least costly.

Recommendation

Investigate Declining Profit : Analyze internal/external factors that caused the sharp profit drop after 2009 and take corrective actions.

Optimize Product Costs : Since product cost is the largest expense, consider supplier renegotiations, bulk purchasing, or product design tweaks to reduce cost.

Explore Margin Strategy : Further investigate why actual and base margins are negatively correlated; reassess how base margins are set.

Address Profit-to-Cost Gap : Evaluate cost-saving strategies or revenue improvement initiatives to reduce the yearly gap between cost and profit.

Fix Order Priority Delivery Times : Ensure **critical orders** are shipped faster than other priorities. They should be delivered in less than or equal to 1 day like the others.

Capitalize on Office Supplies Demand : Consider expanding office supplies product line and marketing efforts due to its high order volume.

Target Low-Performing Regions : Reassess marketing and distribution strategies for **North-Vet** and **Non-Vet** to improve sales.

Reinforce Customer Retention : Implement loyalty or feedback programs to prevent customer loss like what happened in 2011.

Analyze Small Business Segment : Understand why **small businesses** are underperforming in both count and sales—perhaps revise pricing or offer targeted bundles.

Learn from Corporate Clients : Distribute surveys to corporate clients to understand their loyalty and replicate successful practices across other segments.

Reconsider Container Usage : Explore shifting from **small boxes** to **wrap bags** where applicable to cut costs without affecting product safety or quality.