



Retail Sales Dashboard Analysis

Project Objective

01

Analyze retail dataset to
simulate a real business case

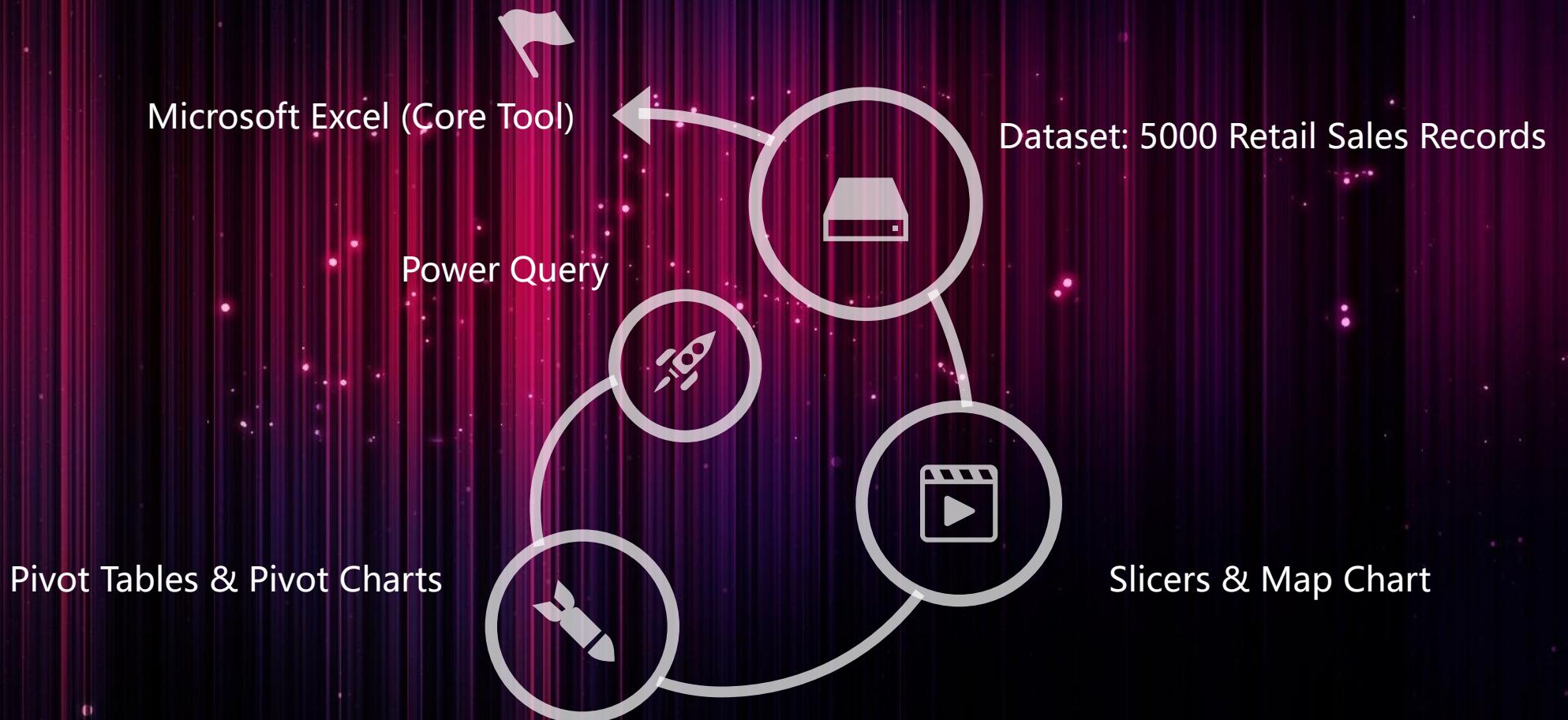
02

Solve decision-making
problems through Excel
dashboard

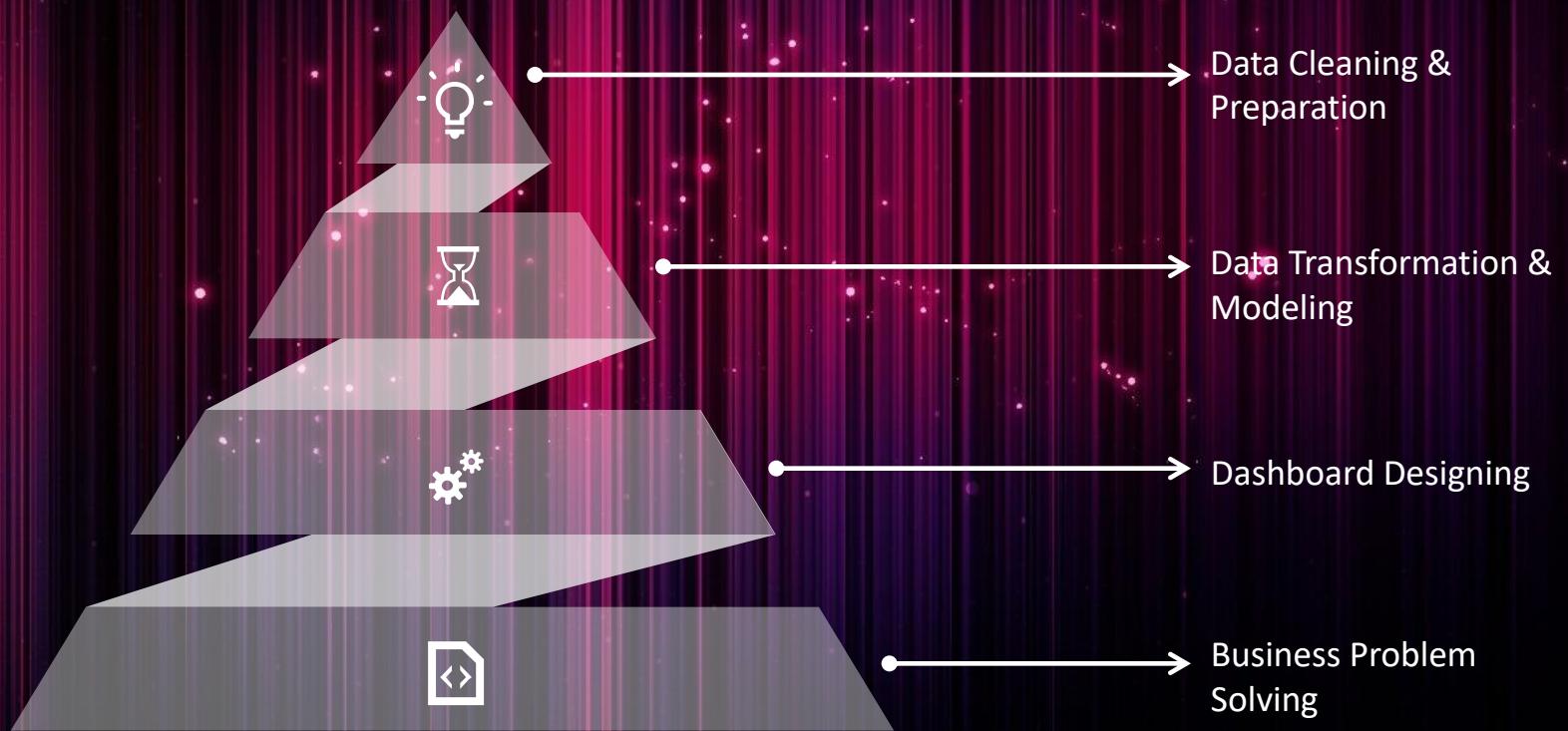
03

Deliver dynamic, slicer-
controlled insights

Tools & Technologies Used



Skills Applied



Business Challenges → Actionable Insights

● Category Performance

Identify which categories drive the most sales and profit.

● Profit Trends

Analyze how profit changes across years.

● Sales Seasonality

Understand monthly and seasonal sales patterns.

● Top Customers

Highlight the most profitable customers.

● Geographical Insights

Discover which states contribute the most to sales.

● Customer Growth

Track total customer count across years.

● Dynamic Summary

Enable interactive filters (Category + Year) for deeper insights.



Problem Insights



Data Import & Cleaning



Imported CSV in
Power Query



Removed duplicates,
filled nulls



Fixed data types &
formatted columns



Data Transformation

01

Split Order Date →
Year & Month

02

Created calculated
fields

03

Structured dataset
for Pivot Tables

Pivot Table Creation



Interactive Controls



- Made dashboard dynamic & user-driven

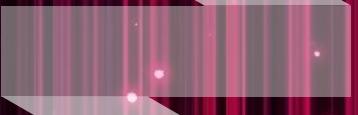
- Slicers for Year & Category

- Linked across multiple pivots

Visualizations Used



Bar Chart → Category-level sales



Line Chart → Profit over time



Area & Pie Chart → Monthly/Category mix

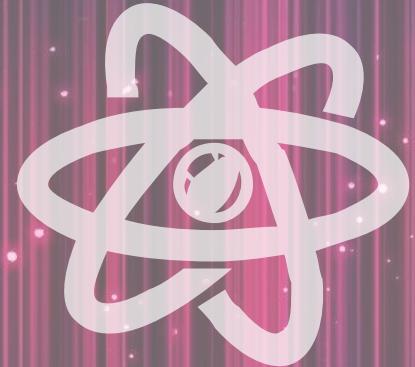


Map Chart → State-wise sales



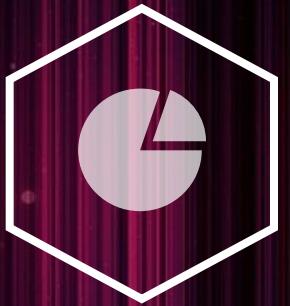
Funnel Chart → Sales by Category

Dashboard Layout



- Clean, professional design
- Visuals grouped by business area
- Balanced colors for easy interpretation

Dashboard Features



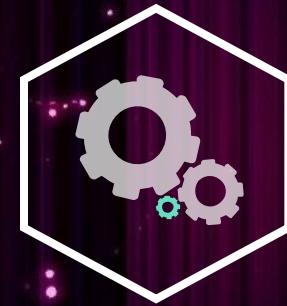
Slicers for real-time
filtering



Segmented visuals for
clarity

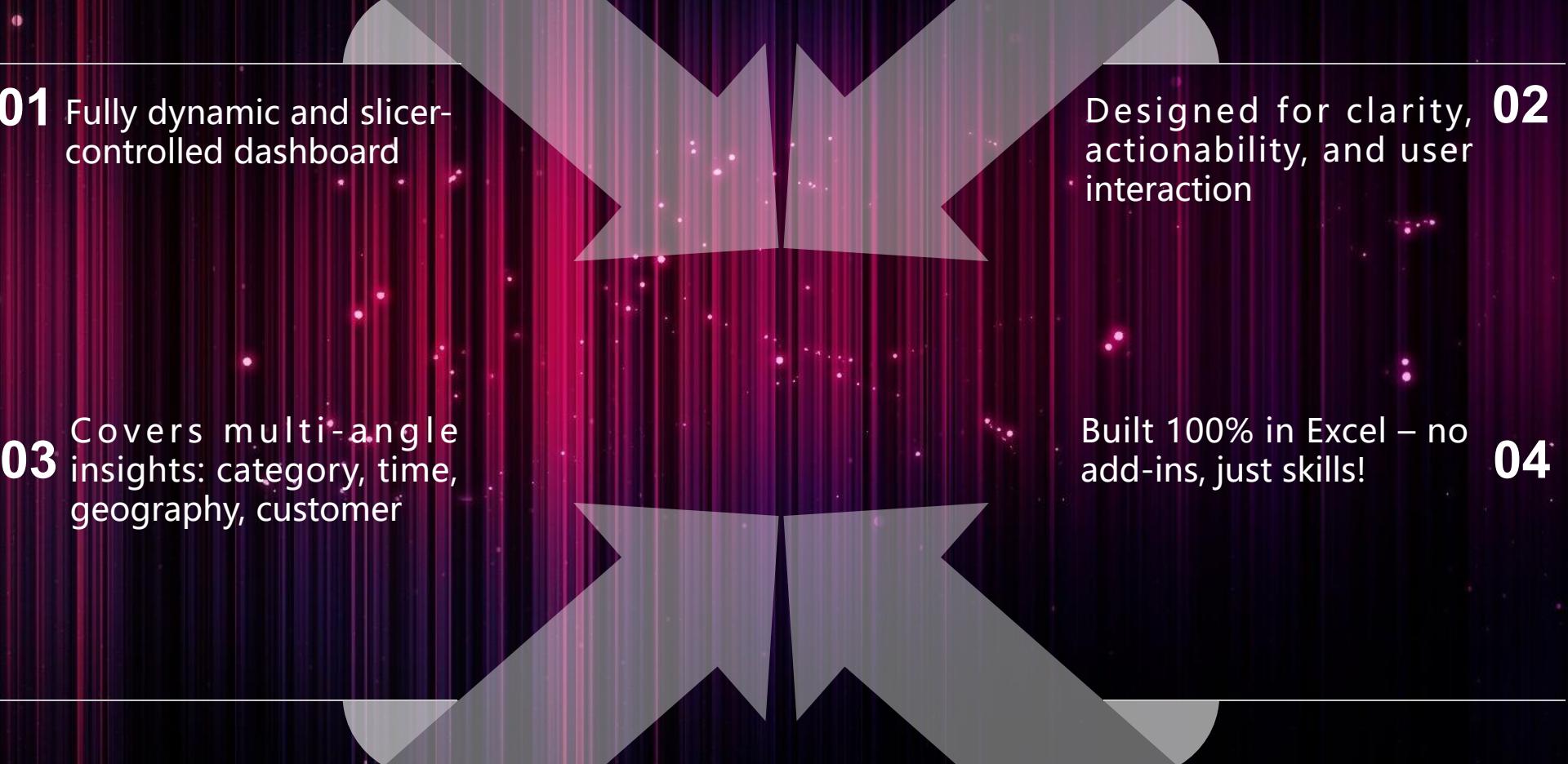


Minimalist design with
professional palette



Built 100% in Excel – no
macros/plugins

Dashboard Highlights



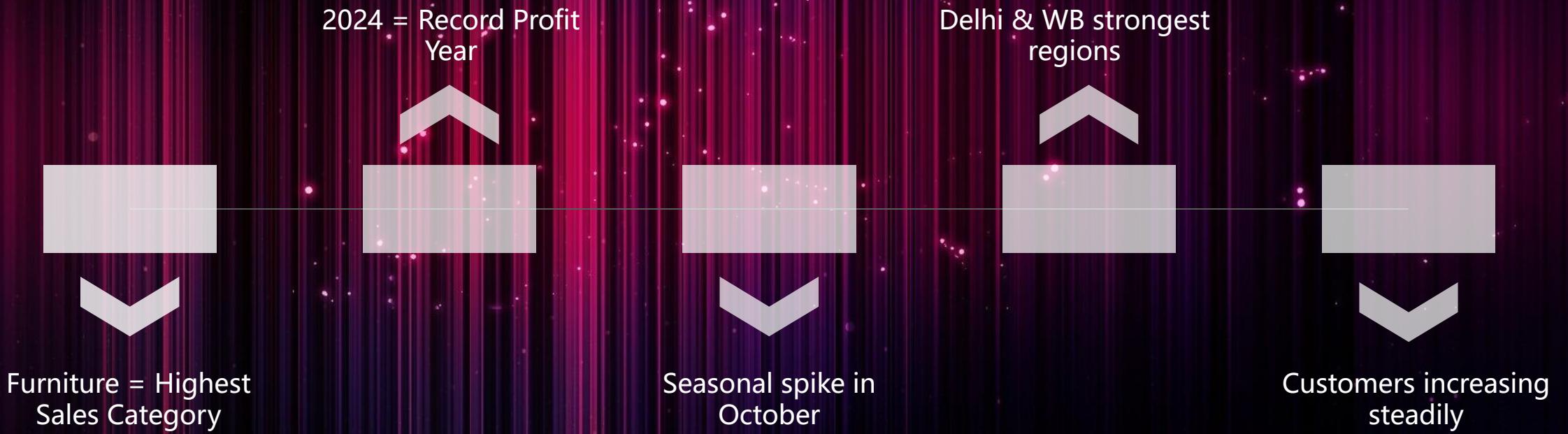
01 Fully dynamic and slicer-controlled dashboard

02 Designed for clarity, actionability, and user interaction

03 Covers multi-angle insights: category, time, geography, customer

04 Built 100% in Excel – no add-ins, just skills!

Key Insights



Business Impact



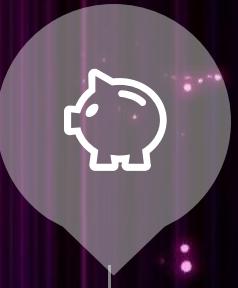
Decision-makers can track category & regional sales drivers



Identify loyal, high-profit customers

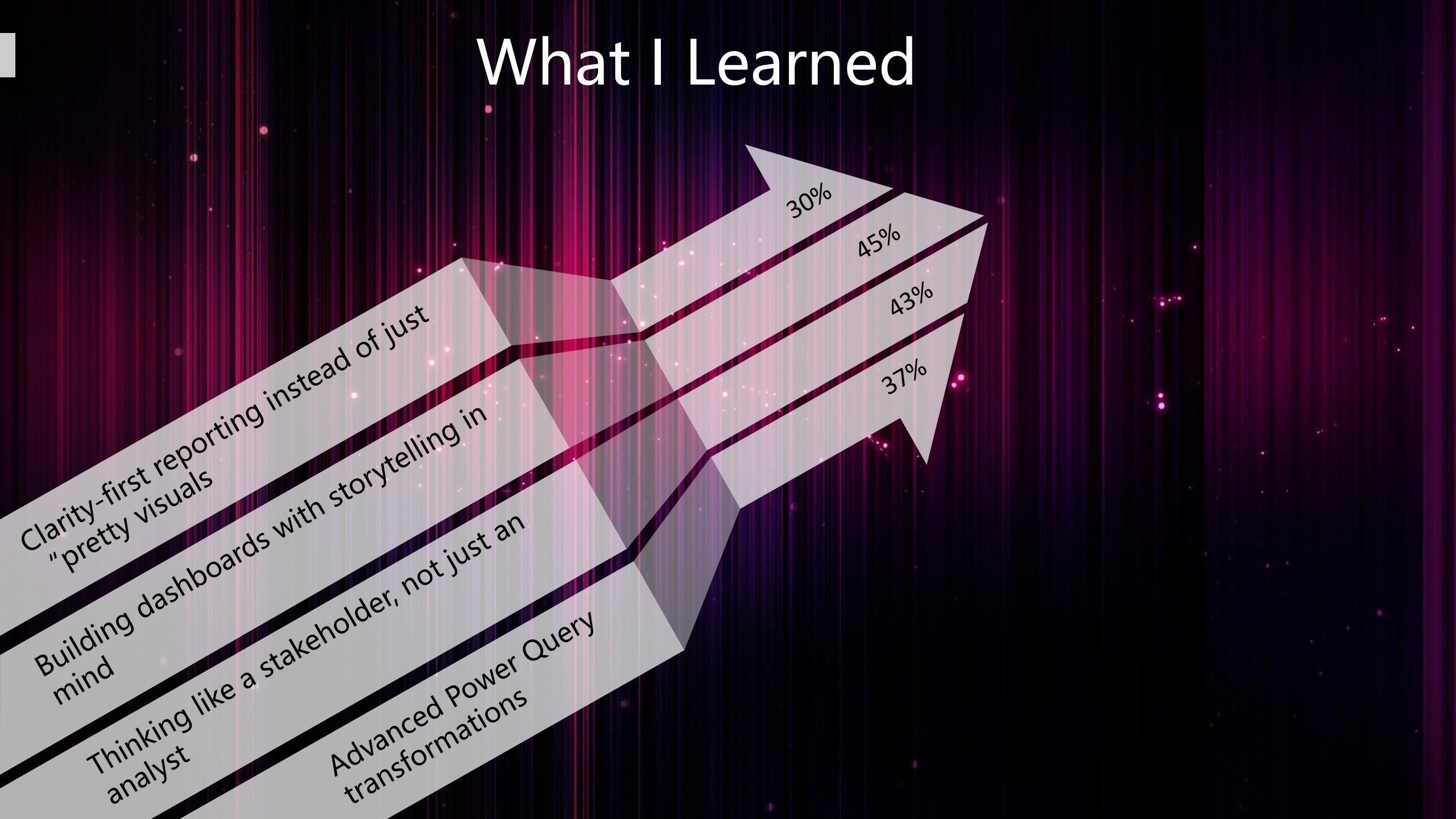


Detect seasonality for planning inventory & promotions



Spot growth opportunities in emerging regions

What I Learned



Clarity-first reporting instead of just "pretty visuals"

Building dashboards with storytelling in mind

Thinking like a stakeholder, not just an analyst

Advanced Power Query transformations

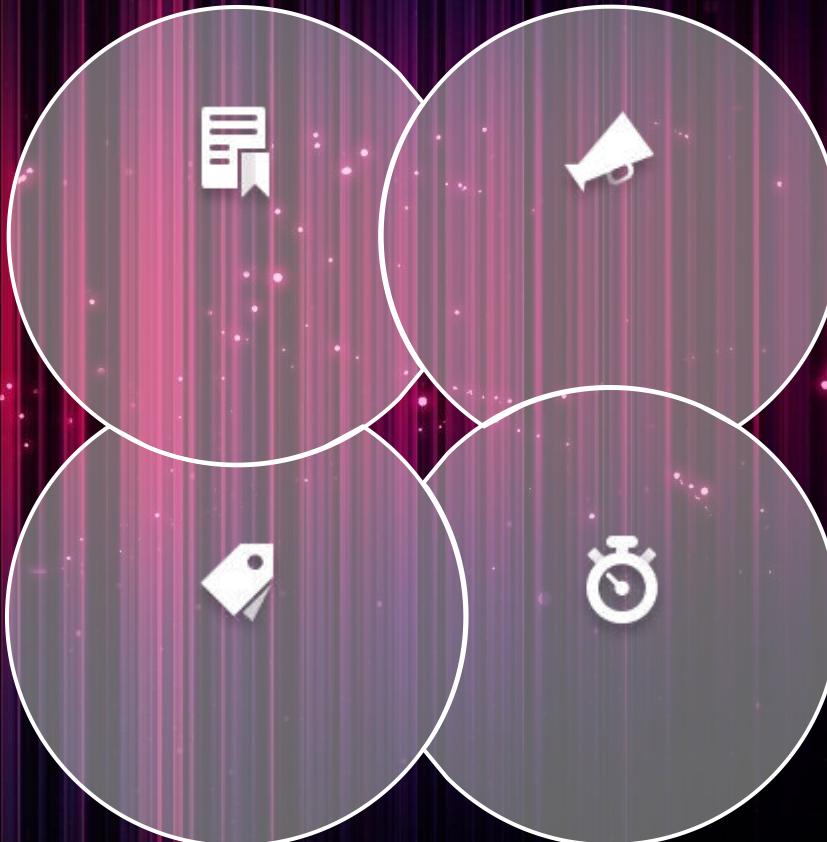
Challenges Faced

01

Handling inconsistent & missing data

02

Optimizing pivot performance on 5000+ rows



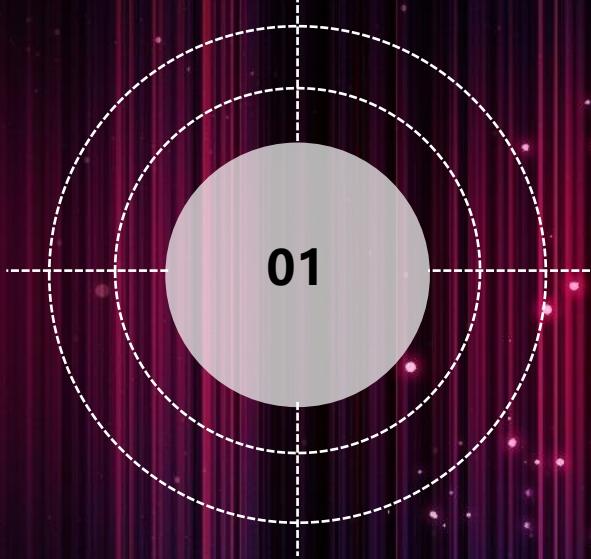
03

Designing for clarity instead of clutter

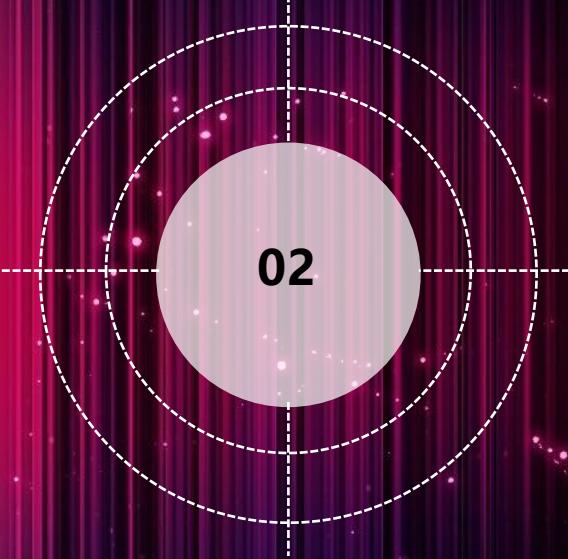
04

Choosing the right chart for the right story

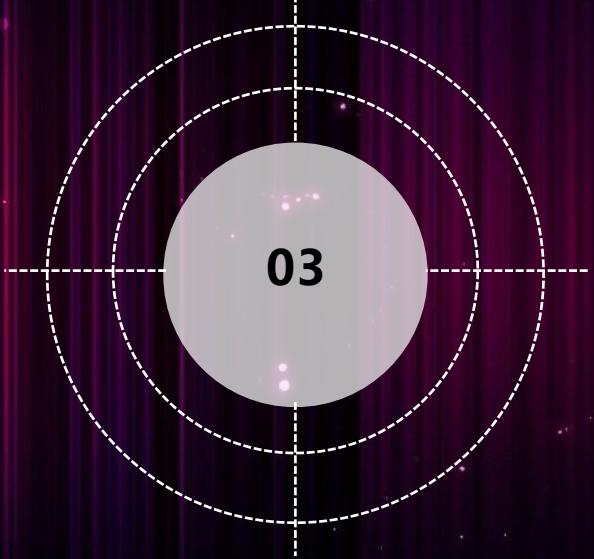
Stakeholder Value



Sales Teams → Target
profitable
categories/customers



Marketing → Run seasonal
campaigns in October peaks



Management → Track
customer growth & future
expansion areas

Storytelling with Data



Structured dashboard to answer “business questions, not just show numbers”



Insights flow from Category
→ Time → Customer →
Region → Growth



Built narrative helps decision-makers act quickly



Future Improvements

Automate refresh with
Power Query



Add KPIs like Customer
Retention & Avg. Order Value



Expand dataset with external
sources (e.g., demographics)



Build comparison view: Planned
vs. Actual sales



Conclusion

01

Transform & Model Data
using Power Query

02

Extract Business Insights
with Pivot Analysis

03

Design Dashboards that
tell stories, not just
numbers

04

Think Critically from a
decision-maker's
perspective

05

Connect Data with
Decisions for practical
impact

06

Use Excel as a Strategic
Tool rather than just a
calculator

07

Work with Clarity, Intent
& Creativity in every
analysis



Retail Sales Dashboard Analysis

