

# The Coffee Cup - Executive Dashboard

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## Executive Dashboard

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Table of Contents

About “The Coffee Cup” .....2

Mission statement: .....2

Corporate Values:.....2

Core Values: .....2

Data Analysis: .....3

    About the data: .....3

    Data Analysis and Data Quality:.....3

Executive Dashboard – The Coffee Cup .....5

Summarized Report - Dashboard .....6

## About “The Coffee Cup”

Coffee Cup provides coffee connoisseurs with a wide array of choices that satisfy discriminating palates, while providing prompt and courteous service. The Coffee Cup’s goal is to be the neighbourhood coffee house you know and love, and you think of when you desire a freshly brewed cup of hot coffee or desire a speciality tea selection.

## Mission statement:

**“To provide the world’s ultimate coffee shop experience with the highest-quality products, most inviting stores, friendliest staff and best value.”**

## Corporate Values:

The Coffee Cup corporate values is to earn the trust and loyalty from their guests by showing what they believe in everyday by knowing what they stand for and acting in a way that supports it.

Being Real - Staff will their authentic and unique self to every situation and opportunity to serve one another and guests better than anyone else.

Be Exceptional – Staff will challenge themselves and others around them to exceed expectations.

Be Passionate – Staff will personalize service for our guests.

## Core Values:

PASSION FOR PEOPLE - Respecting one another and creating a harmonious Bon environment

PASSION FOR SERVICE - Delivering our uncompromising Integrity, Quality, and Service with a Smile.

PASSION FOR KNOWLEDGE - Always staying relevant and ahead of the rest.

PASSION FOR BUSINESS - Providing the best in everything Bon.

## Data Analysis:

### About the data:

The dataset from the coffee cup company has two types of data present in it.

- 1) Financial Data
- 2) Sales Data

- The financial data has the data related to few financial elements of the Coffee Cup company like, Profit, Margin, Sales, Cost of Goods Sold, Total Expenses, Marketing, Inventory, Budget Profit, Budget Margin, Budget Sales, Budget COGS that are presented for each month reported on last day of the month.
- The Sales data has information about the stores, market and geographical information including the market type and product types that were sold in those stores.

### Data Analysis and Data Quality:

The analysis is done by looking into Coffee Cup's 2019-year product performances across provinces and moved onto sales and as well as its inventory. The data is a summation of monthly tallied financials and sales data. However, it does not cover the seasonal, holiday or day wise data which would be further helpful to understand the question which products are consumed on weekends/ weekdays etc. Few performance metrics that are taken into account for the data analysis are Cost of Goods, Coffee Store Performance, Customer Loyalty, Profits and Sales, Product Inventory etc.

Upon analyzing further, we can discern that,

- 1) The data just holds the financial and sales data for 2 years – 2018 and 2019, however **there are outliers in the data which belongs to the year 2012** which is not relevant to the data analysis for this project.

-340	-245	32	245	127	93	2449	-240	-160	0	160	31/03/2012	Central	Ontario	London	775	Small Market	Tea	Green Tea	Regular
-208	-62	63	125	146	113	1118	-190	-60	60	120	31/03/2012	Atlantic	PEI	Summerside	607	Major Market	Espresso	Caffe Mocha	Regular

- 2) **The date field format is wrong** in multiple records as there is no unified format for few of the records in which the month has been provided in different formats which is hard to identify when the date is a singular digit if the date is D/M/YYYY format or M/D/YYYY.

Sample date formats present in the Coffee Cup dataset: DD/MM/YYYY and DD/M/YYYY.

Two date format examples are shown side-by-side. The first is '31/01/2018' in black text inside a green-bordered box. The second is '28/2/2019' in red text inside a green-bordered box.

### **Data Quality:**

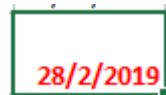
Assessing the data quality, the data from the Coffee Cup is adequate in terms of size and quality to perform a basic level analysis of the Coffee Cup product performance and market level analysis of its products, profits, sales, and Inventory. The data answers the questions from the financials point of view with adequate information of profit, sales, inventory, cost of goods and budget values.

### **Data Fixes/ Patches:**

The data for the months has been fixed for better correlating data in each year which is needed for the data visualization tool for effectively generating insights with correct data lineage.

The date has been fixed for few records where the month was in wrong format.

Before:

A date format example is shown inside a green-bordered box. The text is '28/2/2019' in red.

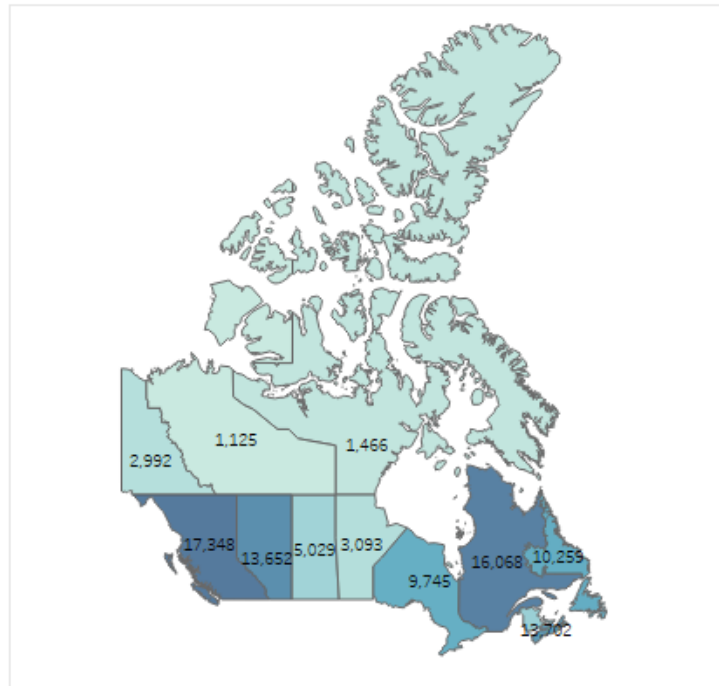
After:

28-02-2019

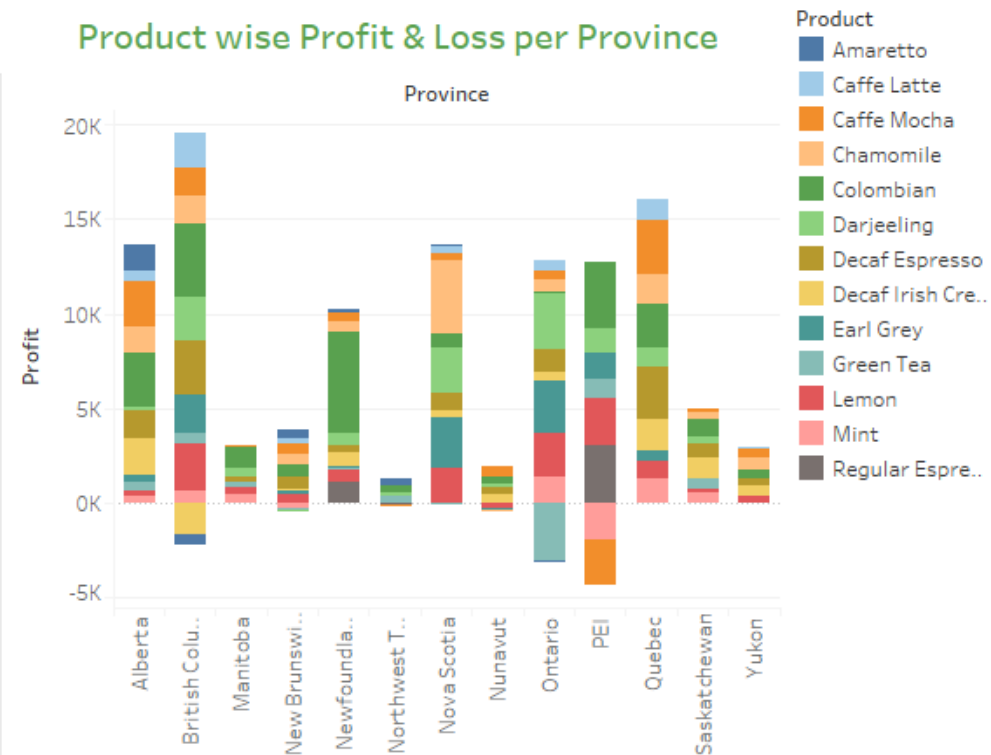
We can say from the data analyzed from the year 2018 and 2019, we can say that the 2020 data must include the product data from weekly or bi-weekly point of view which makes the analysis easier by understanding the product interests on seasonal levels or weekday/weekends level and also the data can be further looked in terms of expenses point of view.

## Executive Dashboard – The Coffee Cup - 2019

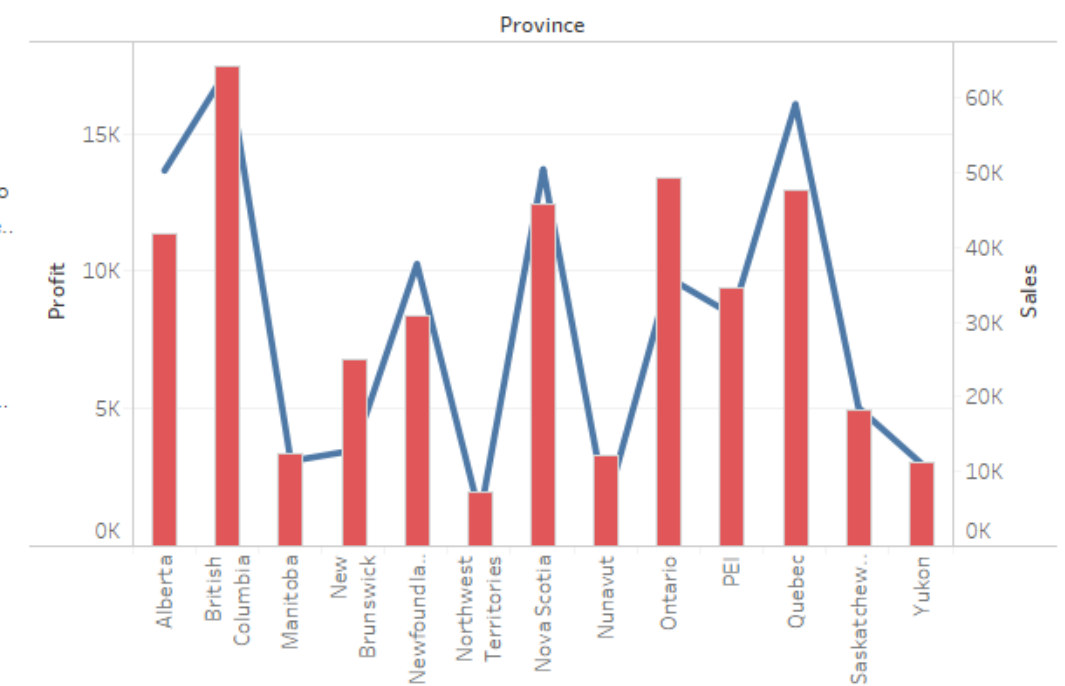
### Total Profit Per Province



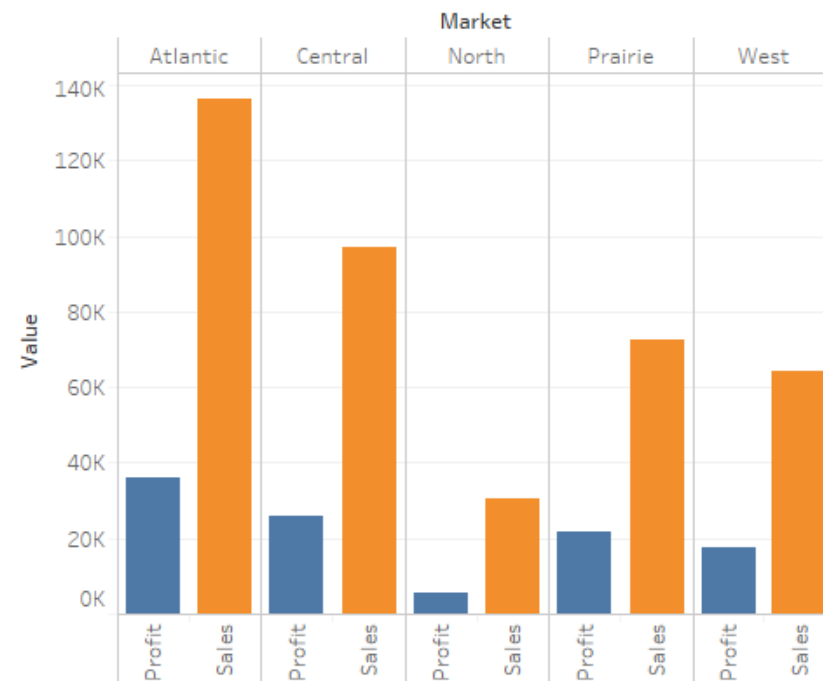
### Product wise Profit & Loss per Province



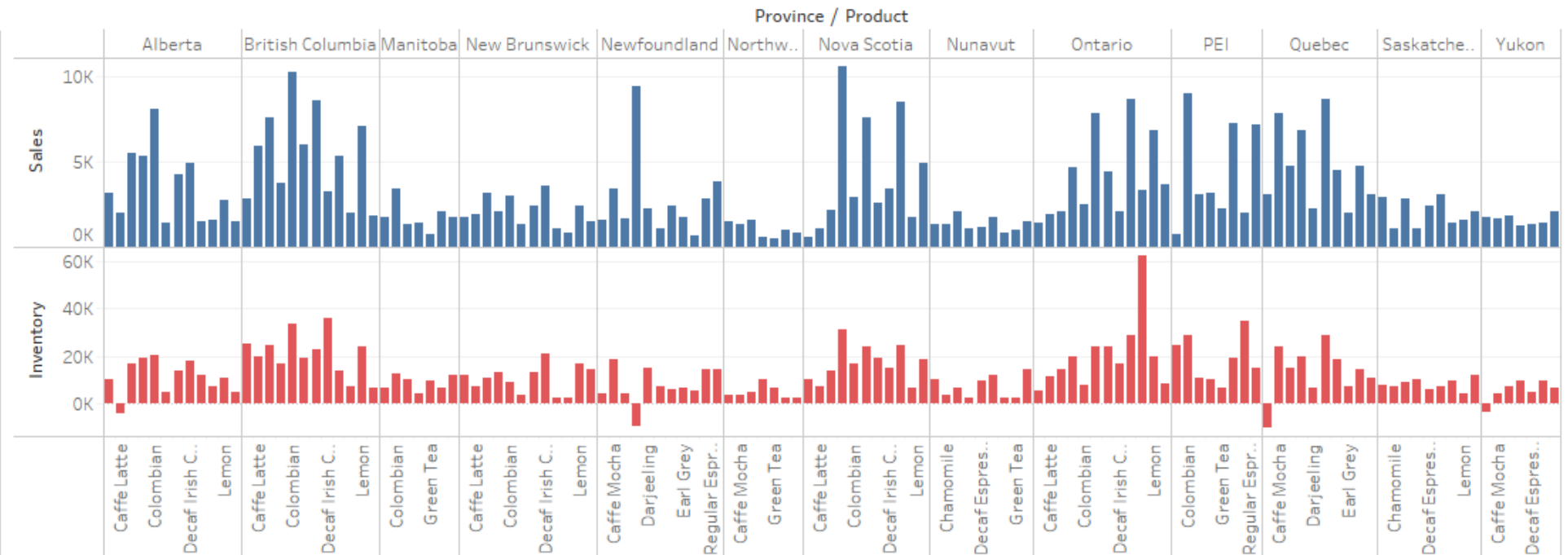
### Profit v/s Sales



### Market wise Sales per Product Type

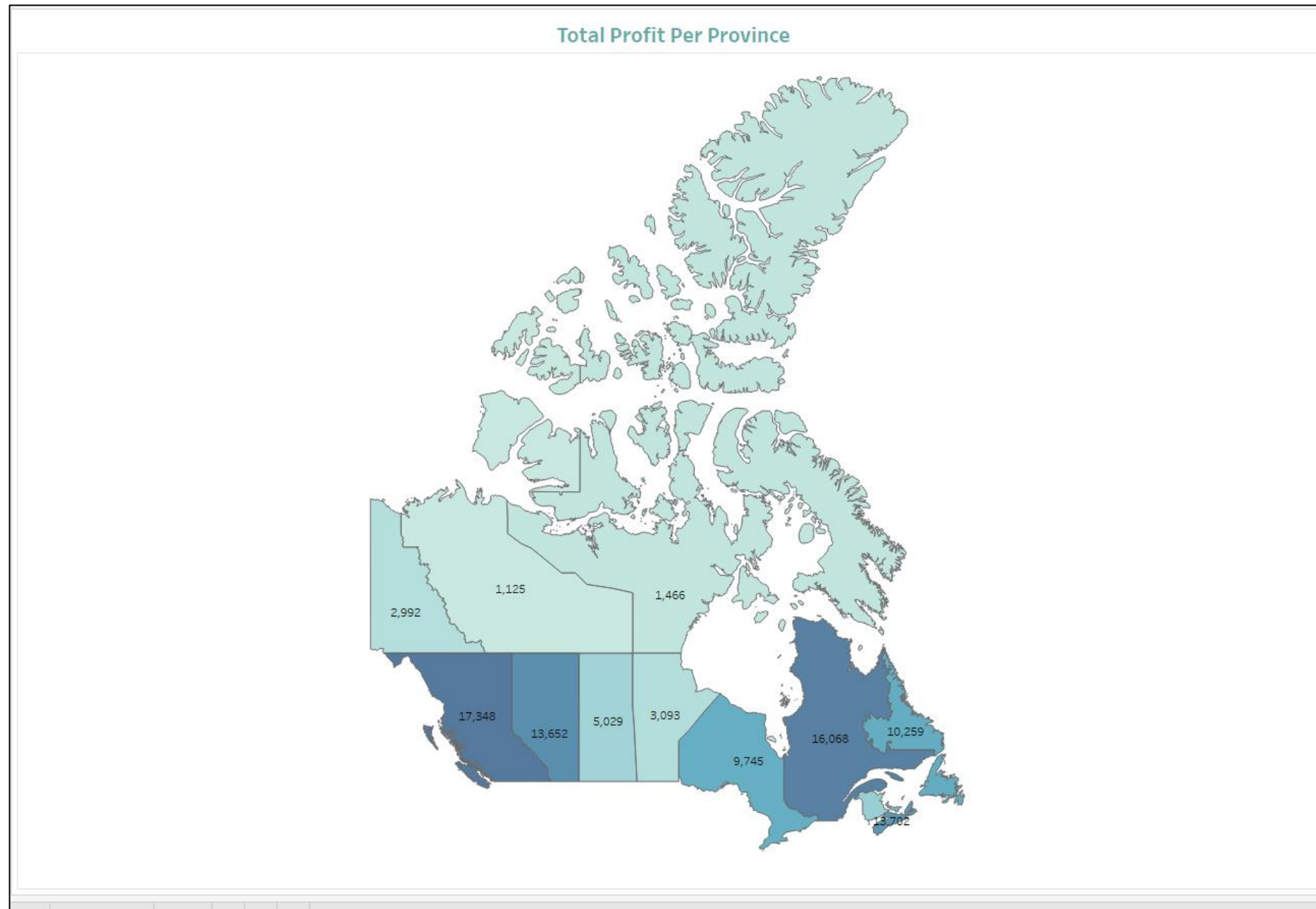


### Inventory / Sales Comparison per Province



## Summarized Report – Dashboard -2019

The first visualization in the dashboard depicts the profit per Province. The visualization shows the most profitable and least profitable Provinces in Canada for “The Coffee Cup” company.



British Columbia is the most profitable province in Canada for “The Coffee Cup” company raking \$17,348 in profits, and the second most profitable province is Quebec, with a total profit of \$16,068, and Nova Scotia is the third most profitable province having \$13,702 in profits. Northwest Territories, Nunavut and Yukon are the least valuable provinces for “The Coffee Cup” company as they earn a profit of \$1125, \$1466, \$2992, respectively in the year 2019.

The second visualization shows us the Product wise profit and loss for each province. Looking at the performance of each product according to the Provinces to gain a better understanding and when observing the chart below, we can figure out that the top 5 products, in terms of profitability, are Colombian, Lemon, Decaf Espresso, Darjeeling and Chamomile.

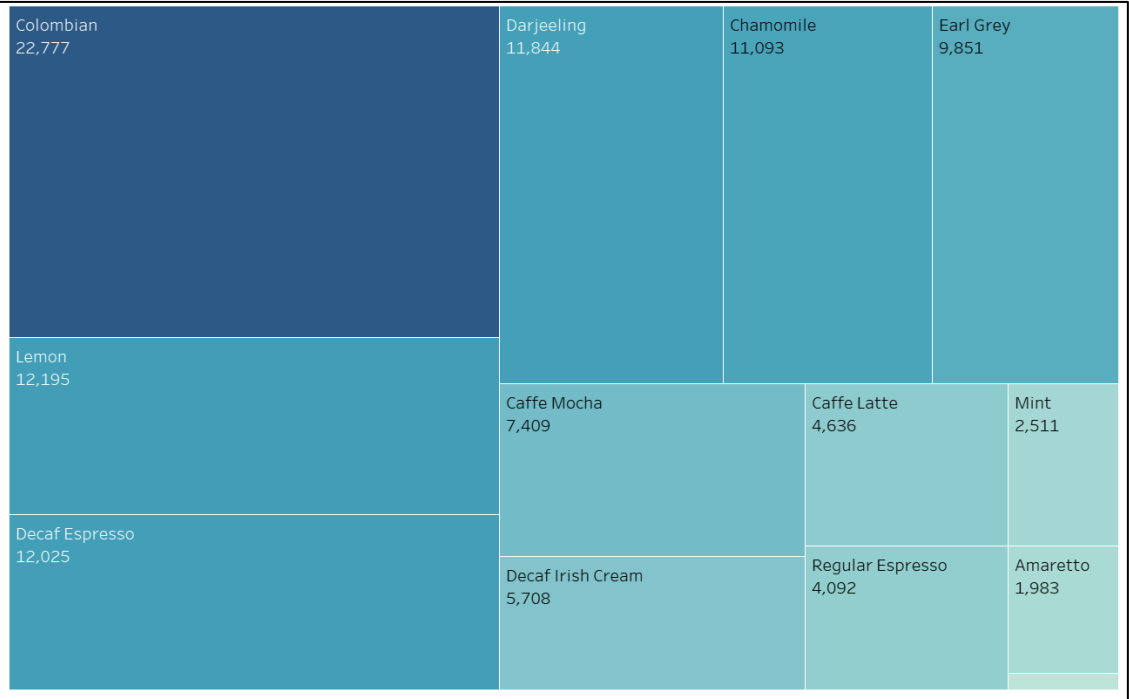
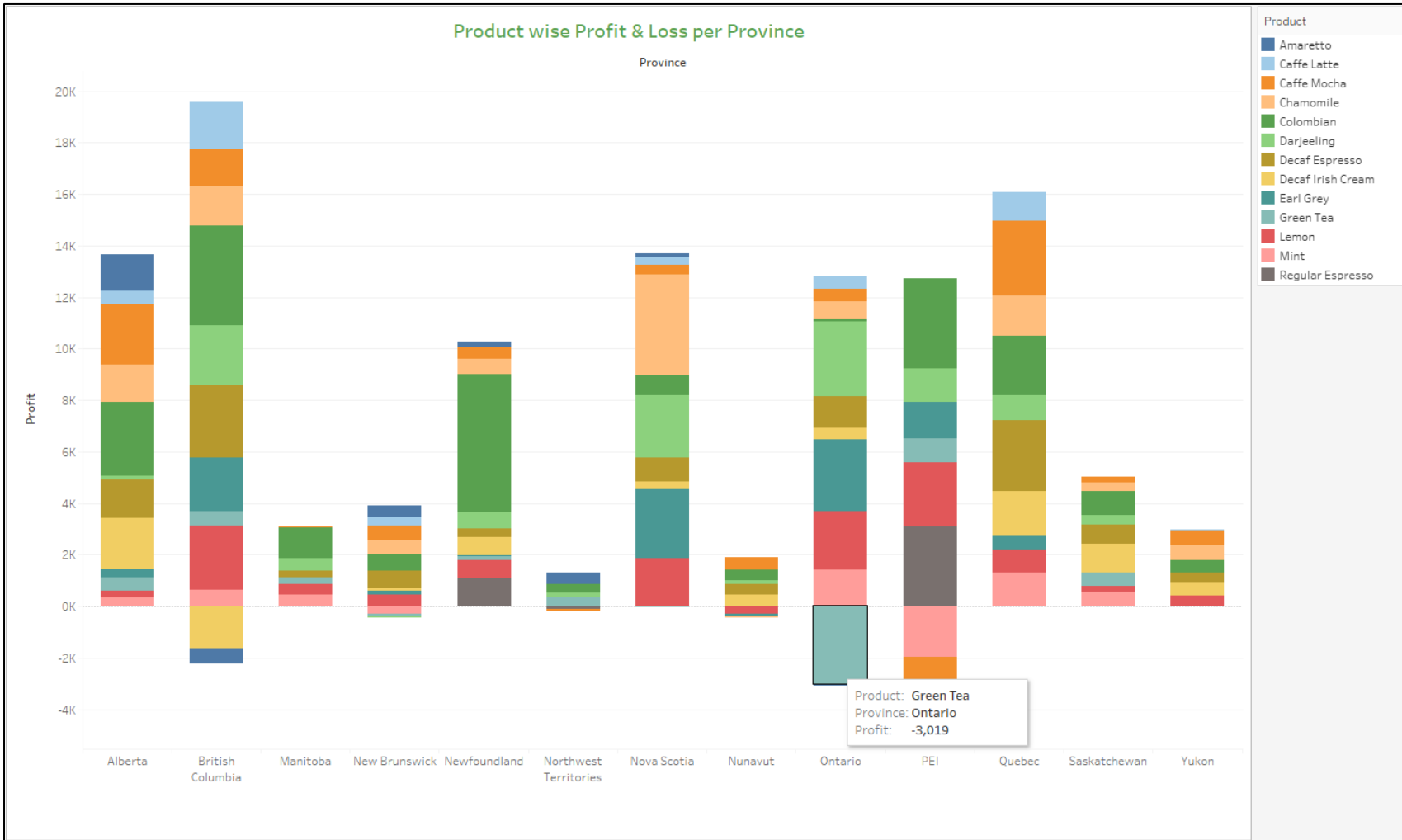
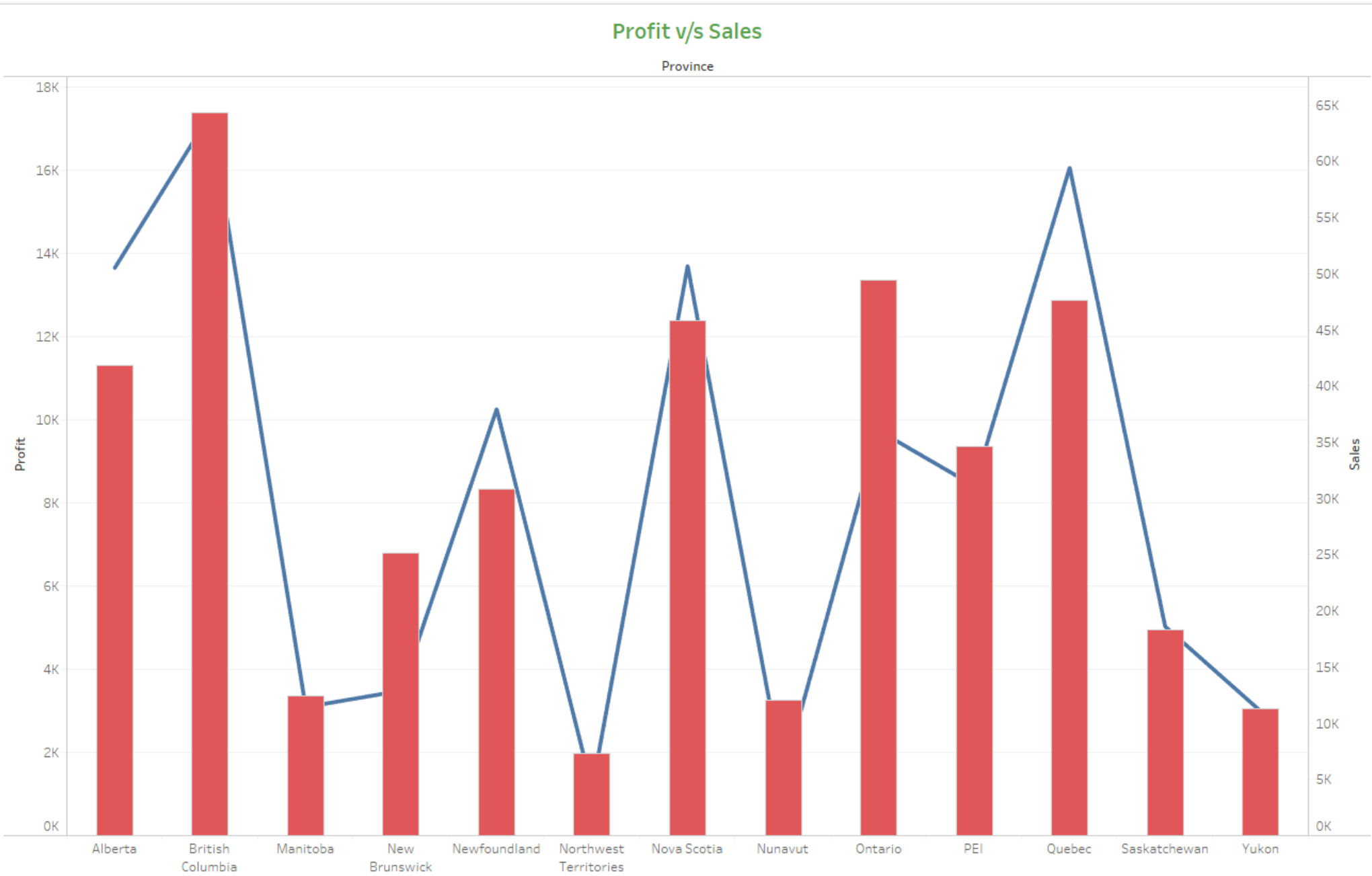


Figure showing total product profit in 2019.

It can be observed that Green Tea is having a poor run in the Ontario Province and therefore, can be considered as an underperforming product. Similarly, Mint tea and Caffè Mocha are a couple of more negatively performing products in the province of Prince Edward Island(PEI). In British Columbia, the Decaf Irish Cream and Amaretto are another couple of products that are not generating any profits for the Coffee Cup company.



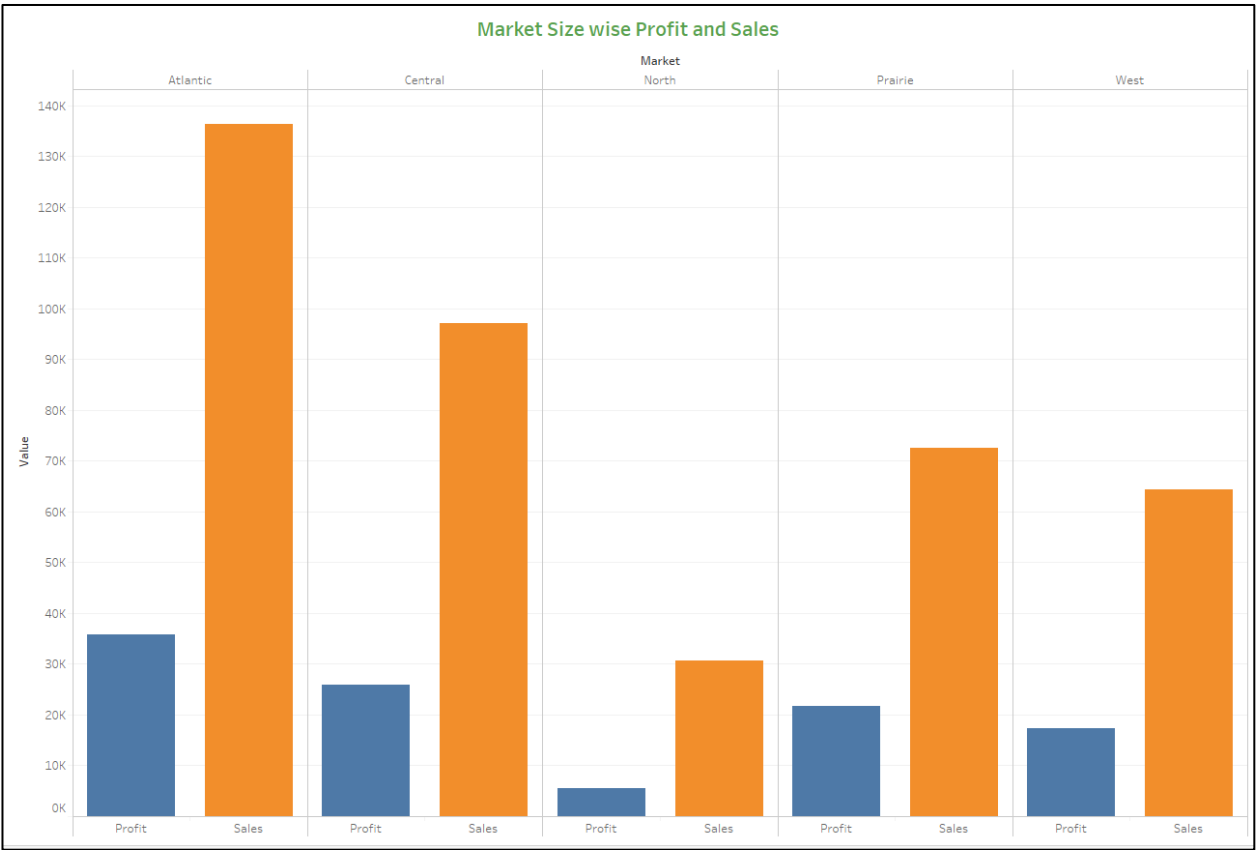
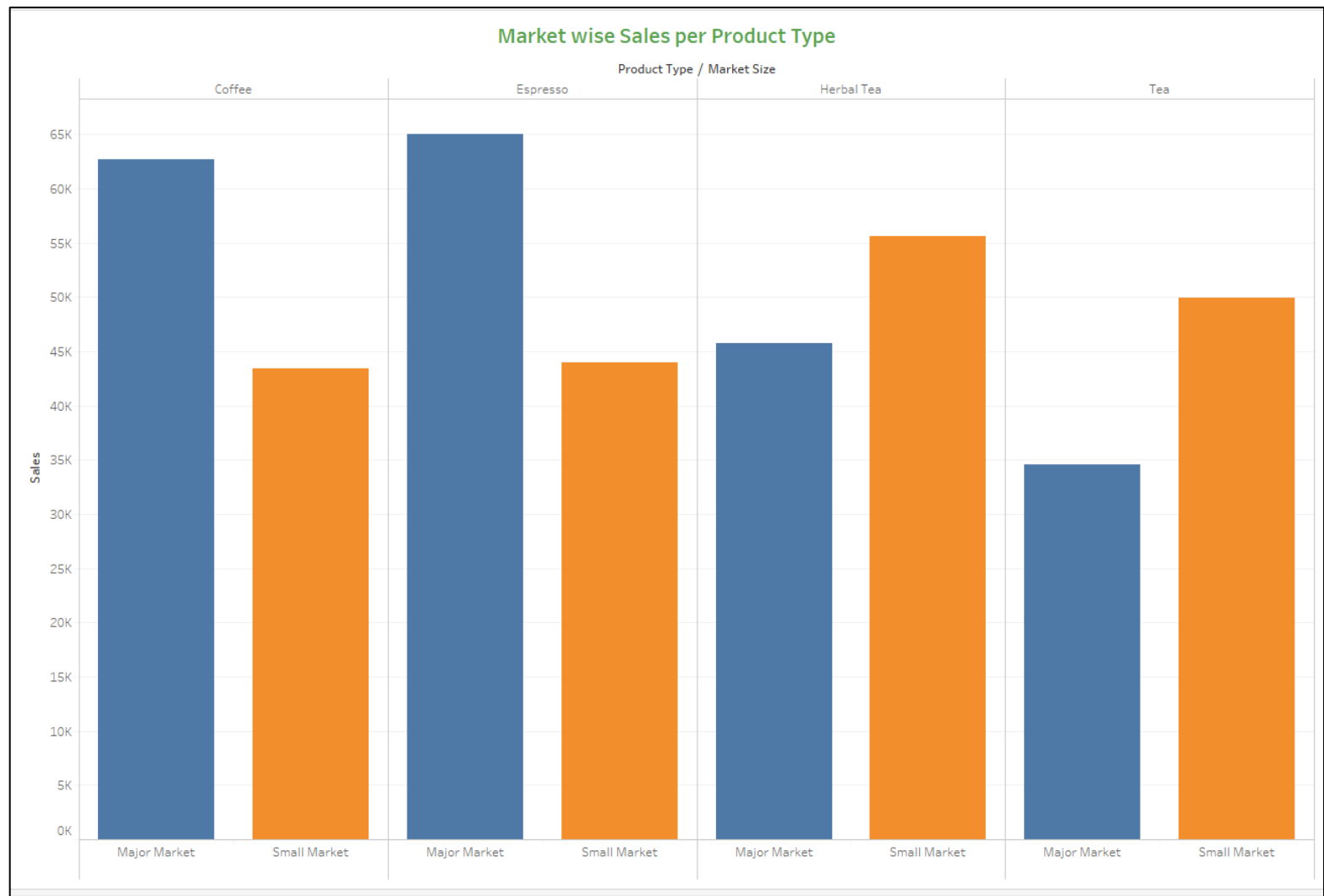
The third visualization shows us the comparison between the Profits and Actual Sales for the Coffee Cup company in individual provinces.



From the visualization above it is evident that a **higher number of sales do not lead to significant profits for some provinces**. This instance can be mainly observed in the province of Ontario as it has a 49,420 in sales, but the profit is only \$9,745.

A similar situation can be observed in New Brunswick, where it has sales of 25,091 but has a profit of \$3,485 only — **indicating that the sales are affecting the profit due to some unknown factors** which cannot be known using the dataset.

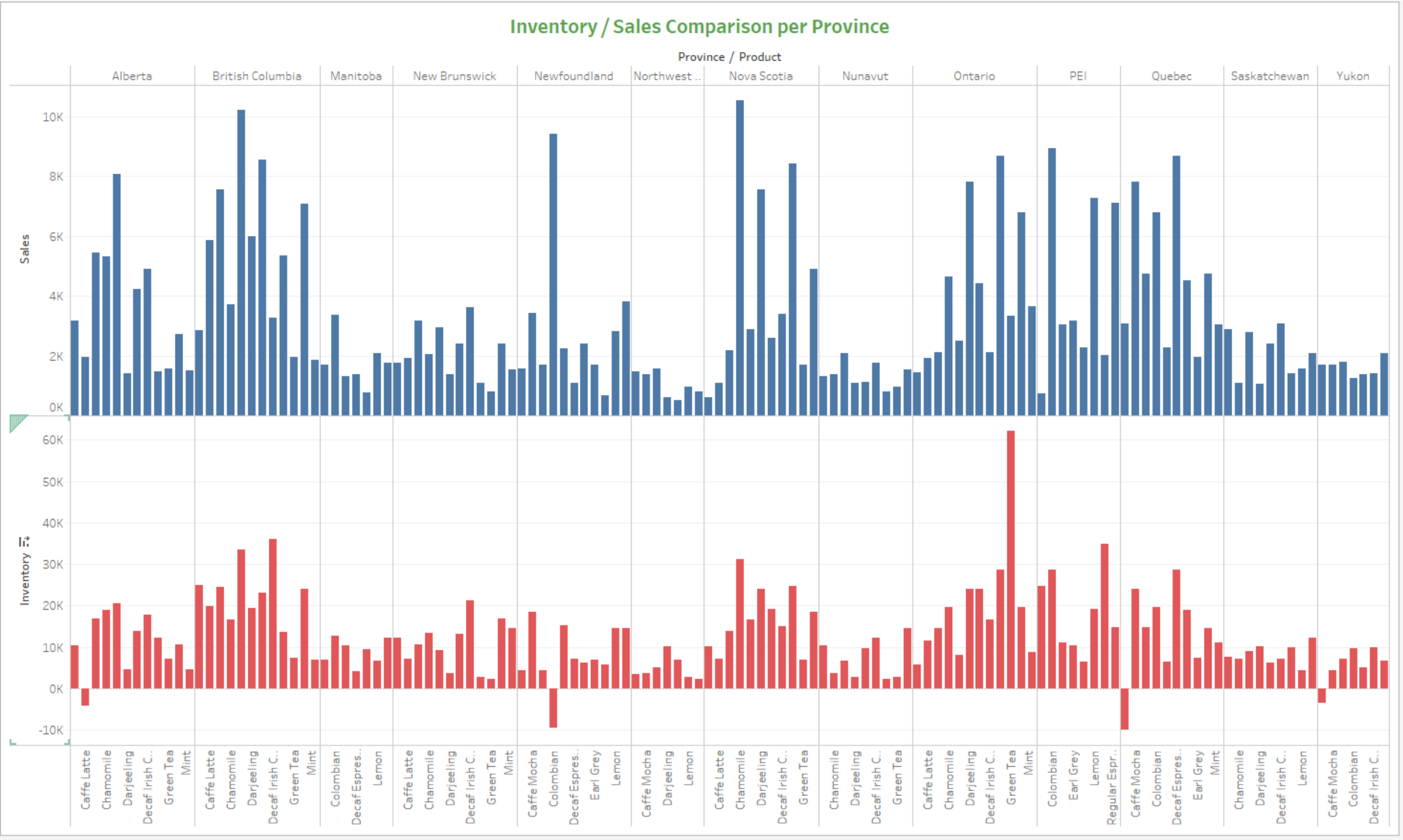
The fourth visualization from the dashboard is the bar chart depicting the market wise sales per product type. Also shown is the market size wise Profit and sales.



Here, we can see the distribution between the market sales per product, ie. Segregated between the Major market and small market for main products which are Coffee, Espresso, Herbal Tea, Tea.

We can discern from the chart that, the Coffee and Espresso are the ones that are ruling the Major market and Tea products, Herbal Tea and Tea are the ones which are ruling the small market.

In the final visualization of the dashboard, we can see the Inventory and Sales comparison for each product per Province.



To dig deeper into the inventory of the different products per Province, from the inventory/sales comparison graph above, it is clear that **in the province of Ontario, the inventory level is exceptionally high for Green Tea**. Also, from the previous data visualization, it is evident that the green tea is an underperforming product in the Ontario Province, **So the inventory level affects the profitability as the stock is not sold out**.

Furthermore, **Colombian in Newfoundland province and Caffe Latte in Quebec have negative inventory**. They however might not be the most profitable provinces, but they do earn a decent profit. Therefore, **the inventory levels should be maintained accordingly to increase the profits steadily**.

**In Conclusion**, from the data analyzed from the Coffee Cup company, we can say that Coffee Cup should focus more on its marketing efforts based on that provinces which are most profitable and also according to product interests in those provinces.

Furthermore, it is needed to look into **backing up its inventory levels** by appropriate distribution of the high demand products so that the marketing efforts can increase the overall sales and in turn revenue. They need to **focus more on inventory efficiencies in few provinces** which are causing the wrong calculation of Cost of Goods Sold which will help maintain stability between the Sales and Inventory. The Coffee Cup company can **also drop the poorly performing products** like Green tea and also limit some products like Decaf Irish Crème, Amaretto, Mint and Caffe Mocha etc. in markets which are performing poorly in specific provinces.