

Tableau User Story | Sales Performance

Introduction

This user story outlines the specifications for building two interactive Tableau dashboards to help stakeholders, including sales managers and executives, analyze sales performance and customer behavior.

Sales Dashboard | Requirements

Dashboard Purpose

The Sales Dashboard provides an overview of key sales metrics and trends, enabling stakeholders to analyze year-over-year performance and identify sales patterns.

Key Requirements

KPI Overview

- Display a summary of total sales, profit, and quantity for the current and previous year.

Sales Trends

- Present monthly sales trends for each KPI, comparing the current and previous year.
- Highlight months with the highest and lowest sales for easy recognition.

Product Subcategory Comparison

- Compare sales performance across different product subcategories for the current and previous year.
- Include a sales vs. profit comparison for better insights.

Weekly Trends for Sales & Profit

- Display weekly sales and profit trends for the current year.
 - Show average weekly values as benchmarks.
 - Highlight weeks performing above and below the average to draw attention to trends.
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Customer Dashboard | Requirements

Dashboard Purpose

The Customer Dashboard provides an overview of customer trends and behaviors. It helps marketing teams and management understand customer segments and improve engagement and satisfaction.

Key Requirements

KPI Overview

- Display a summary of total customers, sales per customer, and total orders for the current and previous year.

Customer Trends

- Track monthly trends for key customer-related metrics, comparing the current and previous year.
- Highlight months with the highest and lowest sales for easy identification.

Customer Distribution by Number of Orders

- Analyze customer behavior based on order frequency to gain insights into customer loyalty and engagement.

Top 10 Customers by Profit

- Display the top 10 customers who have generated the highest profits.
- Include details such as rank, number of orders, current sales, profit, and last order date.

Design & Interactivity Requirements

Dashboard Dynamics

- Allow users to select historical data for any desired year.
- Provide seamless navigation between dashboards for better usability.
- Make charts and graphs interactive, enabling users to filter data through visual elements.

Data Filters

- Enable filtering by product details (category, subcategory).
- Allow filtering by location details (region, state, city).