
Coffee Sales & Financial Dashboard

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Objective & Dataset Description

Objective of Dashboard

- Provide business stakeholders with an interactive view of sales, profit, and inventory metrics across different product lines, regions, and states to make informed decisions.

Dataset Description

- **Source:** Coffee Chain Sales Dataset (source: [Coffee Chain Sales Analysis](#))
- **Time Period:** 2012 – 2015
- **Metrics In The Dataset:** Area Code, Cost Of Goods Sold, Profit Gap: Target Vs Actual, Date, Inventory Margin, Profit Margin Percent, Market Size Category, Market Region, Product Line, Product Type, Product Name, Profit, Sales Volume, State, Target COGS, Target Margin Percent, Target Profit, Target Sales Volume, Total Expenses, Product Category.
- **Calculated Metrics From The Dataset:** COGS Performance Percent, Profit Achievement Percent, Sales Achievement Percent.

KPI Definitions

- **Sales Volume:** Total units sold
- **Profit:** Revenue after deducting costs
- **Total Expenses:** Operating and production expenses
- **Profit Achievement %:** $(\text{Actual Profit} / \text{Target Profit}) * 100$
- **COGS Performance:** Ratio of actual to target cost of goods sold
- **Inventory Margin:** Difference between product value and cost

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|--------------------|---------------|----------------------|---------------------------------|---------------------------------|------------------------|------------------------|
| Sum of SalesVolume | Sum of Profit | Sum of TotalExpenses | Sum of ProfitAchievementPercent | Sum of ProfitGap_TargetVsActual | Sum of InventoryMargin | Sum of COGSPerformance |
| 203K | 64K | 57K | 96.02K | 411 | 866K | 127.16 |

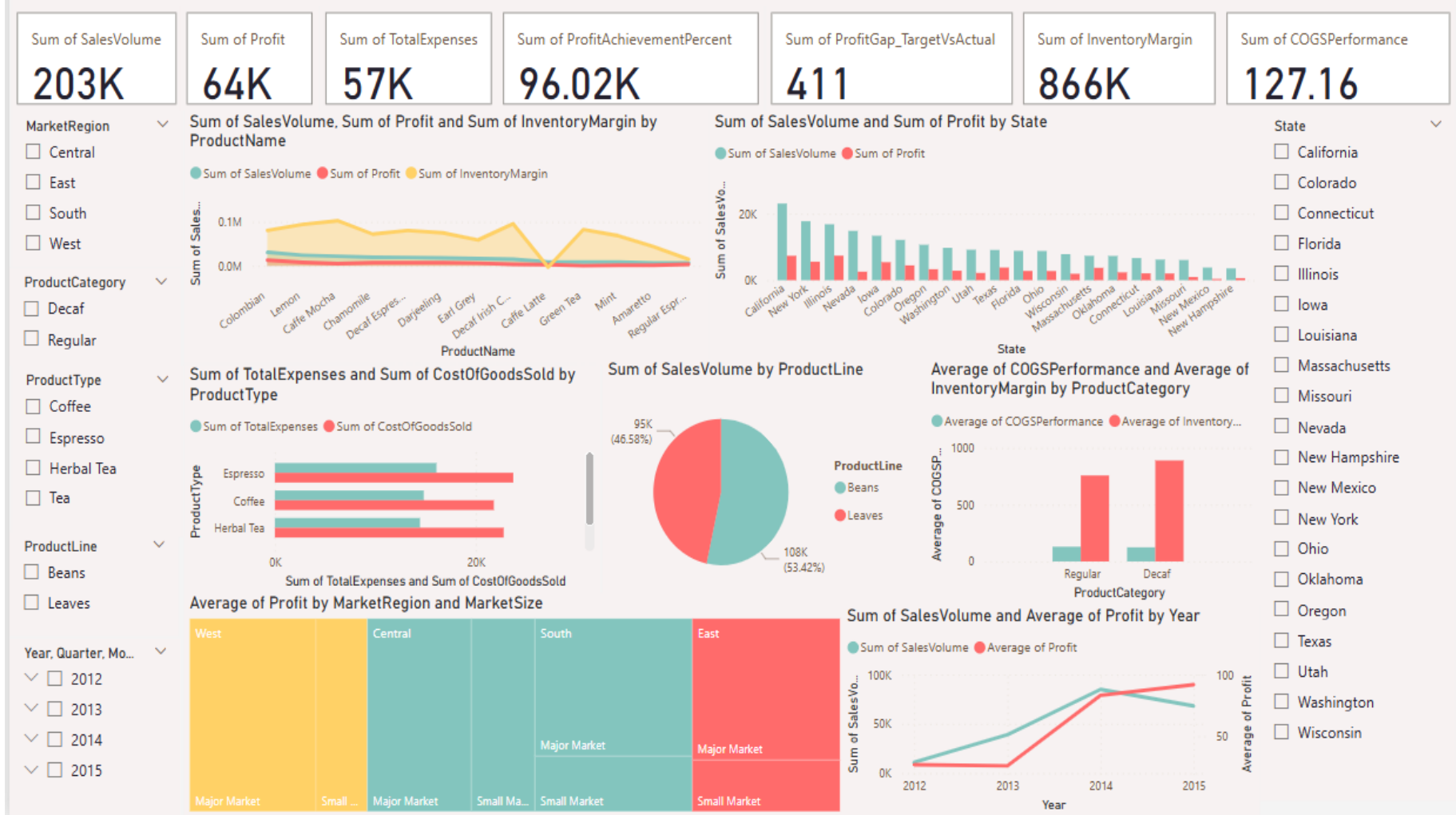
Features Of Dashboard

- Slicers for interactivity (Year, Region, Product Category)
- KPIs at the top for at-a-glance overview
- Time-series line charts
- Pie and treemap for product line and market size
- Bar graphs for profit by state and inventory metrics

Snapshots Of the Dashboard

[GITHUB REPO](#) of the
Dashboard.

COFFEE CHAIN SALES FINANCIAL ANALYSIS



Insights Summary

1. **Beans outperform Leaves** in overall sales volume by 7%.
2. **West region leads in average profit**, especially in Major Markets.
3. **California** and **New York** contribute the **most to profit**.
4. **Decaf category** shows **higher inventory margins** and **lower COGS** than **Regular Category**.
5. **2014** was the **Best Year** in terms of **Sales Volume and Profit**.

Next Steps / Recommendations

- **Focus** on understanding **what went wrong** in **2015**.
- **Reallocate inventory** to high-performing states (e.g., **California, New York**).
- **Review COGS** in **Regular category** to improve profitability.
- **Explore pricing and promotion strategies** in underperforming regions.
- **Build monthly forecasts** using dashboard data trends.