



Welcome

Greetings, I'm Amanda, a proud Wisconsinite. I'm a born and raised city girl now living the country lifestyle. My travels across the United States fostered an appreciation for nature and the world around us. I'm passionate about expanding my skill set and applying it to real-world challenges. Through a self-paced learning journey with Maven Analytics, I've honed my Excel skills in this **Coffee Sales Dashboard**. For a closer look at my educational background and professional experience, please visit my [LinkedIn](#) page or review my resume. You can also reach out via email. Thriving in cross-functional teams allows me to share perspectives, learn from others, and deliver results. My mission is to make data a driving force for transformation in today's business landscape. Let's connect and embark on a journey where data isn't just information; it's a catalyst for positive change. Remember to cherish each day whenever you can.

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COFFEE SHOP SALES DASHBOARD ANALYSIS

THE SITUATION

I've recently become a franchise owner at **Maven Roasters**, a coffee shop chain with three locations in New York City.

THE ASSIGNMENT

To better understand purchase behavior and streamline operations you've collected transactional data from Jan-Jun 2023.

Your goal is to transform the data into a dynamic dashboard that franchise owners can use to identify patterns, trends and opportunities for the business.

THE OBJECTIVES

1. Profile and prepare the raw data for analysis.
2. Explore the data with Excel PivotTables
3. Build a dynamic dashboard to visualize patterns and trends.

THE DATA

Transaction records from **Maven Roasters** (fictitious coffee shop) in New York City

File Type : Excel

Data Structure: Single Table

of records: 149116

of fields: 11

For this Guided Project, data was given cleaned. Only added calculated fields.
added 4 columns

Objective 1: Profile and prepare the raw data for analysis.

I took a look at the data as a whole.

Added filters to headers

ALT H S F

Row count 149456

Time Period: January to June 2023

Checked out different product categories and types]

Coffee & Tea drinks

Beans

Syrups

Baked Goods

Adding columns

adding to end of dataset

Revenue (L)

L2 = H2*D2

copied down, formatted as currency (\$) no decimals

Month (M)

M2 = TEXT(B2,"mmm")

Weekday (N)

N2 = TEXT(B2,"ddd")

copied both down, formatted as general

Hour (O)

O2 = HOUR(C2)

copied down, formatted as number with no decimals

Additional Formatting

formatted new columns to show difference from raw data

shades of blue

Added filters to all headers

Set columns to auto fit width

Objective 2: Explore the data with Excel PivotTables

Ctrl A to select all data on 'Transactions - Calculated' sheet

Insert PivotTable on new tab

Rename 'Dashboards'

Show Revenue by month

formatted currency (\$) no decimals

Copy PivotTable & Paste 4x

1st

Count of Transactions by Day of Week

formatted as number with "," and no decimals

2nd

Count of Transactions by Hour of day

formatted as number with "," and no decimals

3rd

Count of Transactions by Product Category

sorted DESC by Transactions

formatted as number with "," and no decimals

4th

Count of Transactions and Revenue by Product Type

formatted as number with "," and no decimals; currency (\$) and no decimals

sorted DESC by Transactions

filtered to Top 15 by Transactions

Objective 3: Build a dynamic dashboard to visualize patterns and trends

Added PivotCharts to show

- Revenue by Month as a Line Chart
- Day of Week & Hour of Day as Column Charts
- Transactions by Product Category as a Bar Chart

Add Slicer

- by store location
- Connected to all PivotTables

Moved Top 15 PivotTable under slicer

Hide columns with other PivotTables

Hide gridlines

Formatting

- Dark Blue Pallet
- Chart & Plot Area
 - No fill and no border
- Hide Field buttons on charts
- Data Series
 - Solid Fill, no border, 80% gap
 - Data Labels
- Added Chart Titles
- Adjusted alignment of charts

Changed Slicer

- Each store alone and with all three

Formatting Top 15

- Duplicate both fields
- Conditional Formatting
 - Data Bars
 - Solid fill, dark blue, only show data bars
 - formatted header custom ";;;" to make invisible
 - checked box to show on all Transactions and Revenue for Top 15 for each store location

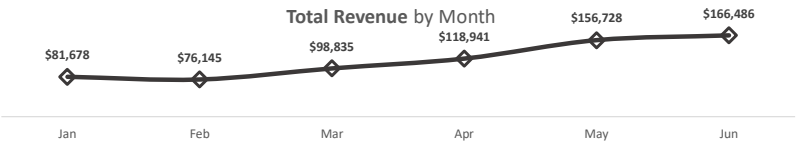
Check out my Insights & Recommendations

store_location

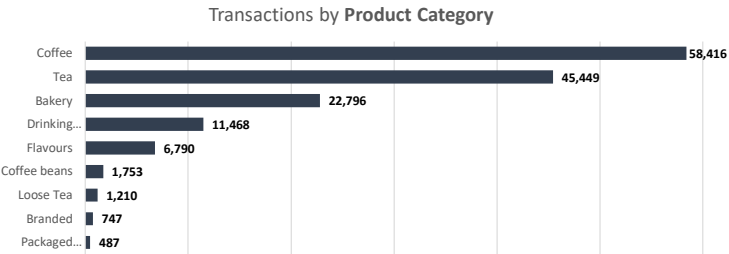
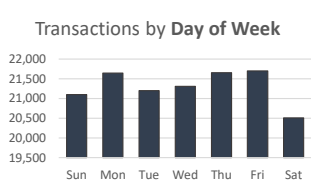
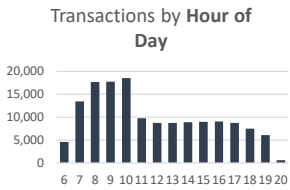
Astoria

Hell's Kitchen

Lower Manhattan



Row Labels	Transactions	Revenue
Brewed Chai tea	17,183	\$77,082
Gourmet brewed coffee	16,912	\$70,035
Barista Espresso	16,403	\$91,406
Hot chocolate	11,468	\$72,416
Brewed Black tea	11,350	\$47,932
Brewed herbal tea	11,245	\$47,540
Scone	10,173	\$36,866
Organic brewed coffee	8,489	\$37,747
Drip coffee	8,477	\$31,984
Premium brewed coffee	8,135	\$38,781
Pastry	6,912	\$25,656
Biscotti	5,711	\$19,794
Brewed Green tea	5,671	\$23,853
Regular syrup	4,979	\$6,085
Sugar free syrup	1,811	\$2,324



Disclaimer

As part of the guided project for Maven Analytics, this only scratches the surface of this analysis of **Maven Roasters**.

Additional investigation of:

Revenue per product and category - could show some products might have high transaction volumes but lower profit margins.

Customer Behavior - digging deeper to understand why these patterns exist. Are these times driven by commuters or locals?

Inventory Management - are any products out of stock during peak hours? Could be a lead to lost sales.

Promotional Impact - If there have been any promotions or marketing campaigns, how did they affect sales? If not, start to increase sales in non-peak hours.

Lower Manhattan

Based on # of Transactions

Top Product: Barista Espresso 5,320

Top Category: Coffee 18,204

Busiest Hours: 7am to 11am

Busiest Day: Monday 7,136

Sales drop around 11am to 3,000 and lower for the afternoon. After 7pm sales drop to almost no sales. Sunday being the slowest day with 6,679 transactions.

Recommendations:

Leverage Espresso Popularity:

Espresso Hour: Create a daily "Espresso Hour" (e.g., 10 am-11 am) with a slight discount on espresso drinks to encourage sales during the peak hour and transition into the slower afternoon.

Espresso Flight: Offer an "Espresso Flight" experience where customers can sample different espresso variations or preparations.

Barista Expertise: Highlight your baristas' skills and knowledge by offering educational sessions or tastings focused on espresso.

Maximize Morning Rush (7 AM - 11 AM):

Staffing & Efficiency: Ensure adequate staffing during this period and optimize workflow to handle the high volume of transactions quickly. Consider an express lane for coffee-only orders.

Grab-and-Go Options: Offer pre-made espresso drinks, pastries, and breakfast items in a clearly visible and easily accessible display to cater to the on-the-go crowd.

Loyalty Program: Implement a loyalty program with rewards specifically for morning purchases to incentivize repeat visits.

Combat the Afternoon Lull:

Lunch Menu: Introduce a simple lunch menu with fresh sandwiches, salads, or soups to attract the lunch crowd.

Co-Working Space: Transform your space into a welcoming co-working environment with comfortable seating, Wi-Fi, and charging stations to attract freelancers and remote workers.

Afternoon Specials: Offer discounted prices on selected drinks and pastries or create "Afternoon Pick-Me-Up" bundles to entice customers during the slower hours.

Boost Evening & Weekend Sales:

Happy Hour: Implement a weekday happy hour with discounted drinks and appetizers to attract after-work crowds.

Partner with Local Businesses: Collaborate with nearby restaurants or bars to offer special deals or promotions to their customers.

Evening Events: Host live music, open mic nights, or trivia nights to create a vibrant atmosphere and attract customers in the evenings.

Address Sunday Slump:

Weekend Brunch Menu: Develop a special brunch menu with unique dishes and drinks to cater to the weekend crowd.

Family-Friendly Promotions: Offer family-sized deals or discounts for groups to attract families with children.

Partner with Community: Participate in local events or festivals to raise brand awareness and attract new customers.

Additional Tips:

Outdoor Seating: If possible, set up outdoor seating to create a more inviting atmosphere and take advantage of good weather.

Delivery/Pick-Up: Partner with delivery services or offer online ordering and curbside pickup for added convenience.

Data-Driven Marketing: Utilize customer data to personalize promotions and offers, targeting specific segments based on their preferences and purchase history.

By implementing these recommendations and adapting to the unique needs of the Lower Manhattan location, you can drive sales throughout the day and week, creating a more thriving and successful coffee shop.

Hell's Kitchen

Based on # of Transactions

Top Product: Barista Espresso 6,153

Top Category: Coffee 20,187

Busiest Hours: 8am to 11am

Busiest Day: Friday and Tuesday ~7,500

Sales drop around Noon to ~2,500 for the afternoon, with less than 550 sales around 8pm. Saturday being the slowest day with 6,846 transactions.

Recommendations:

Capitalize on Espresso's Popularity:

Espresso Specials: Introduce daily or weekly specials centered around the Barista Espresso. Consider a "Morning Espresso Boost" discount or a bundled offer with a pastry or snack.

Espresso Variations: Expand your espresso menu with different types of espresso drinks (e.g., macchiato, cortado, latte) or offer customization options (e.g., alternative milk, flavored syrups) to cater to a wider range of preferences.

Highlight Expertise: Promote your baristas' expertise in crafting espresso drinks through signage, social media posts, or in-store demonstrations.

Optimize the Morning Rush (8 AM - 11 AM):

Staffing: Ensure adequate staffing during peak hours to handle the high volume of transactions and maintain service quality. Cross-train staff to handle multiple tasks to improve efficiency.

Grab-and-Go: Offer pre-made espresso drinks, pastries, and breakfast sandwiches in a clearly visible display case to cater to customers in a hurry.

Express Lane: Consider creating an express lane for customers who only want coffee, ensuring a quick and convenient experience.

Address the Afternoon Lull:

Lunchtime Menu: Introduce a simple lunch menu featuring sandwiches, salads, or soups to attract customers during the midday hours.

Afternoon Specials: Offer discounted prices on selected drinks or pastries in the afternoon to incentivize customers to visit.

Workspace Appeal: Create a comfortable workspace atmosphere with Wi-Fi, charging stations, and ample seating to attract remote workers or students.

Boost Evening and Weekend Sales:

Happy Hour: Offer a "Happy Hour" with discounted drinks and appetizers in the early evening to attract the after-work crowd.

Partner with Local Businesses: Collaborate with nearby restaurants or bars to offer special deals or promotions to their customers.

Host Events: Organize evening or weekend events like live music, open mic nights, or game nights to create a lively atmosphere and attract customers.

Extended Hours: Consider extending operating hours on Fridays and Saturdays to capture potential late-night business.

Improve Saturday Performance:

Weekend Brunch: Offer a special brunch menu on Saturdays with unique dishes and drinks to entice customers.

Family-Friendly Promotions: Create special offers for families, such as kids' meal deals or discounts for groups.

Community Events: Host weekend markets, workshops, or other community events to attract local residents and create a buzz around your shop.

By implementing these recommendations, the Hell's Kitchen location can capitalize on its strengths, address its weaker points, and create a more engaging and profitable customer experience throughout the day and week.

Astoria

Based on # of Transactions

Top Product: Brewed Chai Tea 6,293

Top Category: Coffee 20,025

Busiest Hours: 7am to 11am

Busiest Day: Thursday and Monday ~7,400

Sales are consistent throughout the day until closing. Saturday being the slowest day with 6,942 transactions.

Recommendations:

Leverage the Chai Tea Popularity:

Chai Specials: Create weekly or monthly specials featuring the brewed chai tea. Examples include a "Chai Tuesday" discount or a bundled offer with a pastry.

Chai Variations: Introduce new chai flavors (like spiced chai or vanilla chai) or offer customization options (like almond milk or sugar-free syrup) to cater to a broader range of preferences.

Promotional Display: Place chai tea prominently at the counter or create eye-catching signage highlighting its popularity.

Maximize Morning Rush (7 AM - 11 AM):

Staffing Optimization: Ensure adequate staffing during this peak period to handle the high volume of transactions and maintain service quality.

Grab-and-Go Options: Offer pre-made coffee drinks, pastries, and breakfast sandwiches in a clearly visible display case to cater to customers in a hurry.

Morning Combos: Create attractive breakfast combos that pair coffee with a pastry or sandwich at a discounted price.

Pre-Order System: Implement a mobile app or online platform for pre-ordering, allowing customers to skip the line and pick up their order quickly.

Boost Saturday Sales:

Weekend Specials: Offer special discounts or promotions exclusive to Saturdays, such as a "Saturday Brunch Bundle" or a "Weekend Coffee Card" for multiple purchases.

Community Events: Host weekend events like live music, art displays, or book clubs to attract customers and create a vibrant atmosphere.

Partner with Local Businesses: Collaborate with nearby shops or farmers markets to offer cross-promotions and attract new customers.

Extend Hours: Consider extending operating hours on Saturdays, especially if the surrounding area has foot traffic later in the day.

Maintain Consistency Throughout the Day:

Daily Specials: Offer different specials throughout the day to entice customers during slower periods. For example, a "Midday Pick-Me-Up" discount or an "Afternoon Tea Time" promotion.

Refresh Displays: Rotate food and drink items in the display case throughout the day to keep the offerings visually appealing and encourage impulse purchases.

Loyalty Program: Implement a loyalty program to reward repeat customers and incentivize them to visit more frequently, even during off-peak hours.

By implementing these recommendations, Astoria can capitalize on its strengths, address its weaker points, and