Tableau Training

Project 2 - Sales Performance Analysis

1. Understanding the Business and Data

By analyzing the data given in 2 datasets Sample - Superstore and Sales_Target, we can understand that

A retail Products company sells Products in 3 main categories:

- Furniture (chairs, Tables. Office Chairs etc)
- Office supplies (Paper, Binders, Fasteners, Envelopes etc)
- Technology (Phones, Accessories, Various machines)

The 3 main type of Segments to which products are sold are Home Office, Corporate and Consumer.

The sales of each product are mentioned in Sample - Superstore datasheet and their expected Sales Target in Sales_Target datasheet.

Duration of sales Details: Over a period of 4 years from 2014 to 2017.

2. Understanding the Target Audience or End User

Mike Goodman who is the head of Product Management of the retail products company is the End User/Target Audience. We have to make data visualization regarding monthly sales Vs Target for each Category of data SEGMENTwise to help him determine which products his company should continue to offer for sale and which products should be discontinued.

3. Understanding which chart to create for the purpose.

 To help client identify the segments and categories that have met or exceeded their sales targets, as well as those that have not met their sales targets, we can use Bullet Chart Which contains The Target Sales as Reference Line

Steps

1. Open the dataset Sample – Superstore in Tableau Public.
2. In Data Source → Drag and Drop 'Orders' to Drag Tables here
3. Go to Sheet1→Drag and Drop 'Category' from LHS to Sheet1
4. Go to Data→New Data Source→ open Sales_Target Datasheet
5. To Blend Data, in LHS Click on linkage symbol besides the dimensions Category, Order Date and Segment of Sales_Target dataset.
6. We have to make data visualization regarding monthly sales Vs Target for each Category of data SEGMENTwise. So Drag and Drop the following to Rows and Columns from LHS of in Sample – Superstore dataset.
   Columns - Category, SUM (Sales)
   Rows – Month (Order Date), Segment

7. Create a calculated filed naming Color Code with code:
   if SUM([Sales]) > SUM ([Sales Target (Sales_Target)]. [Sales Target (Sales Target)])
   Then 'Above Target'
   Else 'Below Target'
   END
8. Right click on Colours→Edit Colours→Select Green colour for above target and Red colour for below target.
9. Drag and Drop Order Date to Filters→Right click in it and Select Show filter to select different years which appears in RHS.
10. To get the Reference line of Sales Target, Drag and Drop Sales Target Measure from Sales_Target dataset to Details.
11. Go to Analytics→Drag and Drop Reference line to Sheet→Per Cell. In Edit Reference Line Box → Value= Sales Target →Average.
12. To edit the Title, Double click on the Sheet1 title in Top→ Change title to Sales Performance Vs Target.
13. Go to Dashboard and Drag the respective sheet to Dashboard