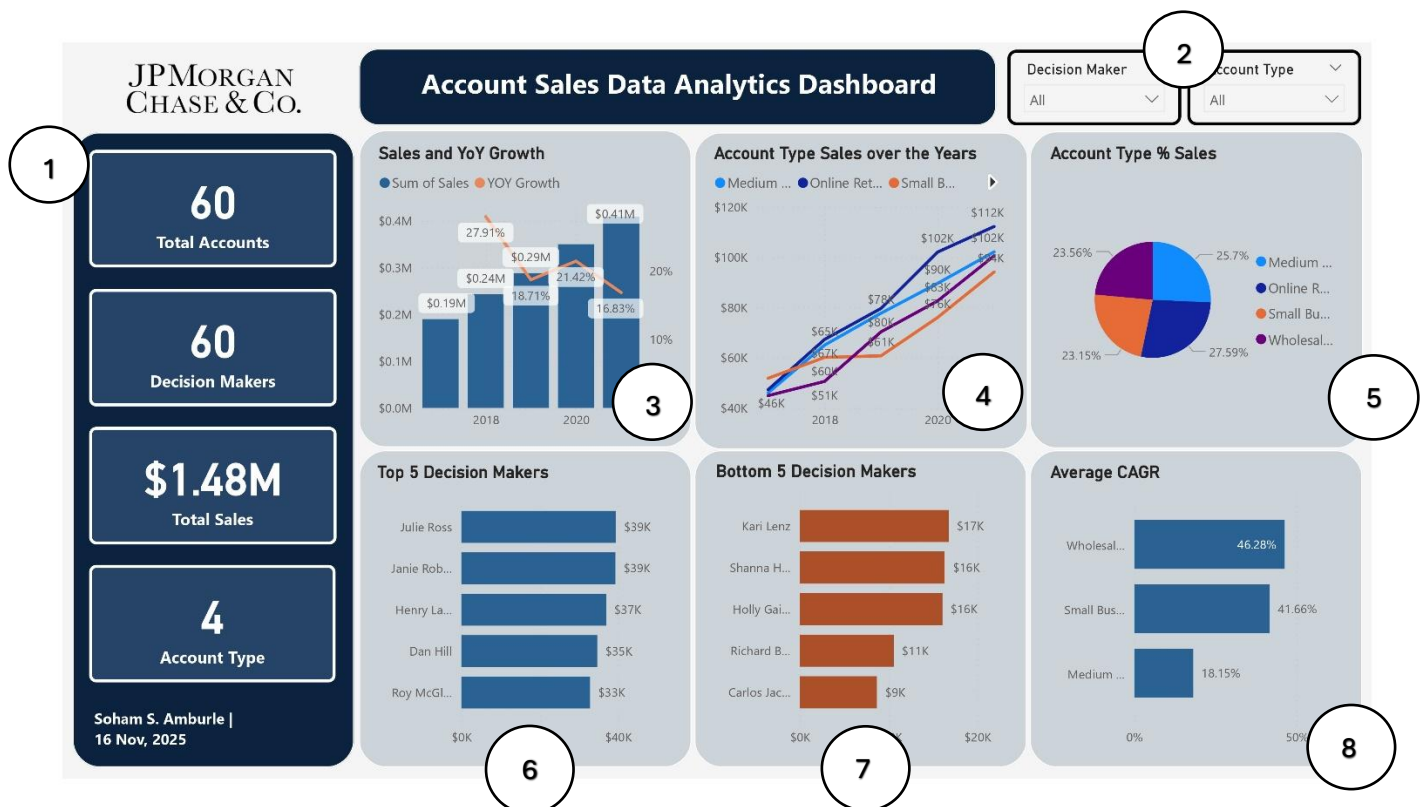# JPMorgan Chase & Co. – Account Sales Data Analytics Dashboard

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The **Account Sales Data Analytics Dashboard** is a complete business intelligence project designed to analyze multi-year sales performance at JP Morgan Chase & Co. Using structured account-level data, the dashboard transforms raw sales information into meaningful insights through dynamic visualizations.

The goal of this project is to identify trends, understand performance across different account types, evaluate the contributions of decision-makers, and support strategic decision-making through clear and interactive analytics.

This dashboard was built using **Power BI**, with the dataset sourced from an Excel financial database.

Description -

1. **Cards (KPI Indicators):** These four key metrics summarize the overall structure of the dataset and business volume -
   o **Total Accounts**: Displays the total number of accounts handled.
   o **Decision Makers**: Indicates the number of unique decision makers contributing to sales.
   o **Total Sales**: Shows the aggregate sales value across all years.
   o **Account Type**: Displays the number of account categories in the dataset.
   These KPIs provide a quick overview of the business scale and segmentation.
2. **Slicers**: These Slicers allow users to filter the dashboard dynamically -
   o **Decision Maker**: View performance for specific individuals.
   o **Account Type**: Compare segments such as Medium Business, Small Business, Online Retailer, and Wholesale Distributor.
   These filters enhance interactivity and allow for customized analysis.
3. **Sales and YoY Growth (Line and Stacked Column Chart)**: This visualization shows the year-wise sales performance alongside the corresponding YoY growth percentages. It highlights a strong upward trend in total sales from 2017 to 2021, with the highest YoY increase occurring in 2018. Although sales continue to rise each year, the YoY growth rate gradually declines after 2018, indicating slower acceleration despite overall revenue improvement.

This chart provides a clear view of both absolute sales performance and the pace at which the business is growing over time.

4. **Account Type Sales Over the Years (Line Chart)**: This chart tracks how each account type performs across the years, revealing distinct growth patterns for Medium Business, Online Retailer, Small Business, and Wholesale Distributor. It makes it easy to compare segment trajectories and identify which categories show consistent growth, stability, or need strategic focus.

5. **Account Type Sales Over the Years (Pie Chart)**: The pie chart presents the overall contribution of each account type to total sales. It clearly shows the proportional share of segments such as Online Retailer, Medium Business, Small Business, and Wholesale Distributor, helping identify which areas drive the most revenue and which hold opportunities for expansion.

6. **Top 5 Decision Makers (Stacked Bar Chart)**: This visualization highlights the highest-performing decision makers by showing their total contribution to sales. It helps identify key individuals who play a major role in driving revenue, making it easier to prioritize relationship management and recognize high-impact accounts.

7. **Bottom 5 Decision Makers (Stacked Bar Chart)**: This chart displays the lowest-performing decision makers in terms of sales contribution. It is useful for spotting accounts that may need additional support, strategic engagement, or further analysis to understand underlying performance issues.

8. **Average CAGR (Stacked Bar Chart)**: The CAGR chart compares long-term growth rates across different account types. It highlights which segments show strong sustained growth and which lag behind, offering a clear understanding of long-term performance potential and areas where strategic efforts may be required.

The **Account Sales Data Analytics Dashboard** provides a complete, data-driven perspective on JP Morgan's account performance over five years. Through interactive filters, KPI indicators, and trend-based visualizations, the dashboard highlights:

- Strong overall revenue growth

- High-performing account segments

- Key decision makers driving the business

- Areas where performance improvement is possible

- Long-term growth potential across account categories

This dashboard serves as a powerful tool for strategic planning, performance tracking, and informed business decisions.

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