

Presentation Script: Tableau Dashboard Walkthrough for CEO & CMO

[Intro – 20 seconds]

Hello, and thank you for your time.

In this presentation, I'll walk you through my findings from the data provided in the Online Retail dataset, based on four key business questions raised by leadership. I'll begin with how I prepared the data, followed by insights specifically tailored to support decisions for both the CEO and CMO.

[Part 1: Data Preparation – 45 seconds]

Before diving into the analysis, I cleaned the dataset to ensure accuracy:

- I identified and excluded any records where the **Quantity was less than 1** or where the **Unit Price was negative**. These likely represented returns or data entry errors.
 - I then created a **calculated Revenue field**, multiplying valid quantities by valid prices.
 - This clean dataset ensured that every insight I present today is based on high-quality, reliable data.
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[Part 2: CEO – Monthly Revenue Trend – Q1 – 1 minute]

Let's begin with the CEO's interest in understanding monthly revenue trends for the year 2011.

I created a **time series line chart** that displays monthly revenue for that year. As expected, we observe clear seasonal peaks, particularly in November and December — likely influenced by holiday shopping behavior. There's also a noticeable dip during the summer months.

These insights can inform our demand forecasting and inventory planning. I recommend aligning marketing and logistics efforts to capitalize on peak periods, especially Q4.

[Part 3: CMO – Top 10 Countries by Revenue (Ex-UK) – Q2 – 1 minute]

Next, for the CMO's request, I analyzed **international sales performance** — excluding the UK.

Using a dual-bar chart, I visualized the **top 10 countries by revenue**, along with **units sold**. The results show strong performance from countries like the Netherlands, Germany, and France. Interestingly, some countries generate high revenue with fewer units sold — indicating a higher average unit price or larger order values.

This can help us tailor marketing strategies per region — for example, promoting premium products in higher-revenue countries.

[Part 4: CMO – Top Customers by Revenue – Q3 – 45 seconds]

For your third question, I focused on **identifying our most valuable customers**.

Using a ranked bar chart, I isolated the **top 10 customers by revenue**. These individuals are vital to our business and should be prioritized for loyalty and retention programs. Targeted engagement — such as early access to sales or personalized promotions — can help deepen these relationships and secure long-term value.

[Part 5: CEO – Demand by Country (Ex-UK) – Q4 – 1 minute]

Finally, returning to the CEO's interest in geographic demand distribution — I built a **global map visualization** showing **total units sold per country**, excluding the UK.

This reveals clear pockets of demand, particularly across Western Europe and select countries in Asia-Pacific. These markets show strong product movement and represent key opportunities for **market expansion**.

With this insight, I recommend conducting feasibility studies to establish localized distribution or marketing channels in these high-performing regions.

[Conclusion – 30 seconds]

To wrap up:

- The data was cleaned and validated for quality before analysis.
- Seasonal revenue patterns, high-performing regions, top customers, and global demand hotspots have all been identified.

- These insights support strategic decisions around forecasting, marketing, customer retention, and international growth.

I look forward to discussing how we can act on these insights to drive business performance.

Thank you.