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Project Title - **Financial Performance Analysis using Tableau**

Report on Financial Performance

I have created a financial dashboard using Tableau, utilizing the data provided.

Objective

- The aim of this Tableau dashboard is to assess and present the financial performance using the available data.

- The goal is to deliver a clear, visually engaging overview of financial metrics.

Dataset Link

[financial_data.csv - Google Drive](#)

Data Cleaning

1. Changed the CSV file to Excel file format.
2. Changed the format of "Date" column from "MM-DD-YYYY" to "DD-MM-YYYY".
3. Changed data types of all numeric columns from string to integer.
4. After cleaning the data in Excel, I saved the file in Excel format under the name "financial_data_cleaned.xlsx".

Overview

The Tableau dashboard presents a comprehensive financial performance analysis across various dimensions including sales, profit, discounts, product and segments. The data spans multiple time frames and geographies, providing a clear insight into the key drivers of the business.

Dashboard Sections

Data Filtering

You can filter the data by different date, segments, products and country to focus on specific information.

Visualization

- **Dual Line Chart:** Shows Total Sales and Total Profit trends over the Months and Years.

- **Bar Chart:** Shows Total Sales and Total Profit by Country and Segment.
- **Bar Chart:** Shows Total Sales and Total Units Sold by Product.
- **Bar Chart:** Shows Total Sales and Total Profit by Discount Band.
- **Scatter Plot:** Shows Total Sales and Total Discounts by Product and Segment.
- **Map:** Shows the map of Countries where Products are sold.
- **Bar Map:** Shows Total Sales and COGS by Product.
- **Bar Chart:** Shows Profit Margin by Segment.
- **Treemap:** Shows Gross Sales and Total Profit by Segments and Products.

Key Insights

Total Sales and Total Profit by Month and Year

- **Sales Trend:** The line graph shows a steady variation in sales throughout the year 2014, with noticeable peaks around May and September.

- **Profit Trend:** Profit follows a similar pattern to sales, suggesting that revenue generation is consistently linked to profit margins across these months. Both sales and profit seem to experience spikes during the second half of the year, possibly due to seasonality or other external factors.

Total Sales and Total Profit by Country

- **Top Countries by Sales:** The bar chart shows the United States and France leading in sales, followed by Germany and Canada. Mexico has the lowest sales and profit figures among the listed countries.

- **Profit Distribution:** The profit closely follows the sales trend in each country. The United States and France demonstrate the highest profitability, which indicates strong market positions in those regions.

Total Sales and Total Profit by Discount Band

- **Impact of Discounts on Sales and Profit:** The analysis highlights that higher sales are associated with products that receive medium to high discounts. However, products with no discounts have the lowest sales but better profit margins. This indicates that discounting strategies have a significant impact on sales volume, though at a cost to profit margins.

Gross Sales and COGS by Product

- **Product Performance:** "Paseo" is the highest-grossing product, followed by "VTT" and "Velo".

- **Cost of Goods Sold (COGS):** COGS reflects the expenses involved in manufacturing these products. "Paseo" also has the highest COGS, which makes sense given its dominant sales figures. Despite high COGS, "Paseo" remains highly profitable due to its market demand.

Profit Margin by Segment

- **Government Segment:** This segment yields the highest profit margins, especially with "Paseo" (24.04%) and "Velo" (17.71%).
- **Channel Partners & Midmarket:** These segments also show healthy profit margins, with consistent performance across various products.
- **Enterprise Segment:** This segment shows the lowest profit margin (ranging between 0.06% to 0.22%), which suggests that enterprise clients might require significant discounts or offer lower profitability per unit sold.

Total Sales and Total Discounts by Product and Segment

- **Sales and Discounts Analysis:** The scatter plot provides a comparison of discounts and sales across different segments. Government clients purchasing "Paseo" appear to benefit from fewer discounts but still lead in sales. Small Business and Enterprise segments have higher discounts, particularly for products like "Velo" and "Carretera", yet their sales remain lower compared to other segments.

Total Sales and Total Units Sold by Product

- **Sales Leaders:** "Paseo" dominates in both total sales (33,011,144 units) and units sold (338,240 units), reaffirming its position as the top-selling product.

- **Other Top Products:** "VTT" and "Velo" follow, contributing significantly to the company's overall sales and unit volumes.

Gross Sales and Total Profit by Segments and Products

- **Profit Distribution by Segment and Product:** The tree map effectively highlights how the government segment, particularly with "Paseo" and "Amarilla", dominates both gross sales and total profit. The small business segment contributes to a lesser extent, mainly driven by products such as "Velo" and "Montana".

Geographical Insights

- **Regional Sales Overview:** The map visualization highlights that North America (USA and Canada) and Europe (France, Germany) are the primary sales hubs.

- **Opportunities for Growth:** Mexico shows potential for growth, given its relatively low sales and profit compared to the other countries.

Strategic Recommendations

- **Focus on High-Profit Segments:** The government and channel partner segments consistently deliver strong profit margins. Efforts to further optimize product offerings and expand these segments could yield higher returns.

- **Reevaluate Enterprise Discounts:** The enterprise segment appears to generate low profit margins, which might be due to heavy discounting or operational inefficiencies. A deeper dive into this segment could reveal opportunities to improve profitability.

- **Increase Marketing for Top Products:** "Paseo", "VTT", and "Velo" are clear leaders in sales. These products should be the focus of marketing and distribution efforts to maximize market penetration and drive revenue growth.

- **Explore New Opportunities in Mexico:** With its low sales and profit, Mexico presents an opportunity for growth. A focused marketing or distribution strategy could help capture a larger market share in this region.

Conclusion

The dashboard provides a clear and comprehensive view of the company's financial performance. With key insights into sales, profit, and segment performance, the data emphasizes the importance of targeted marketing strategies, effective discounting, and a focused approach on high-profit regions and segments.

The company should continue leveraging data-driven insights to refine its strategy, optimizing for both short-term sales growth and long-term profitability.
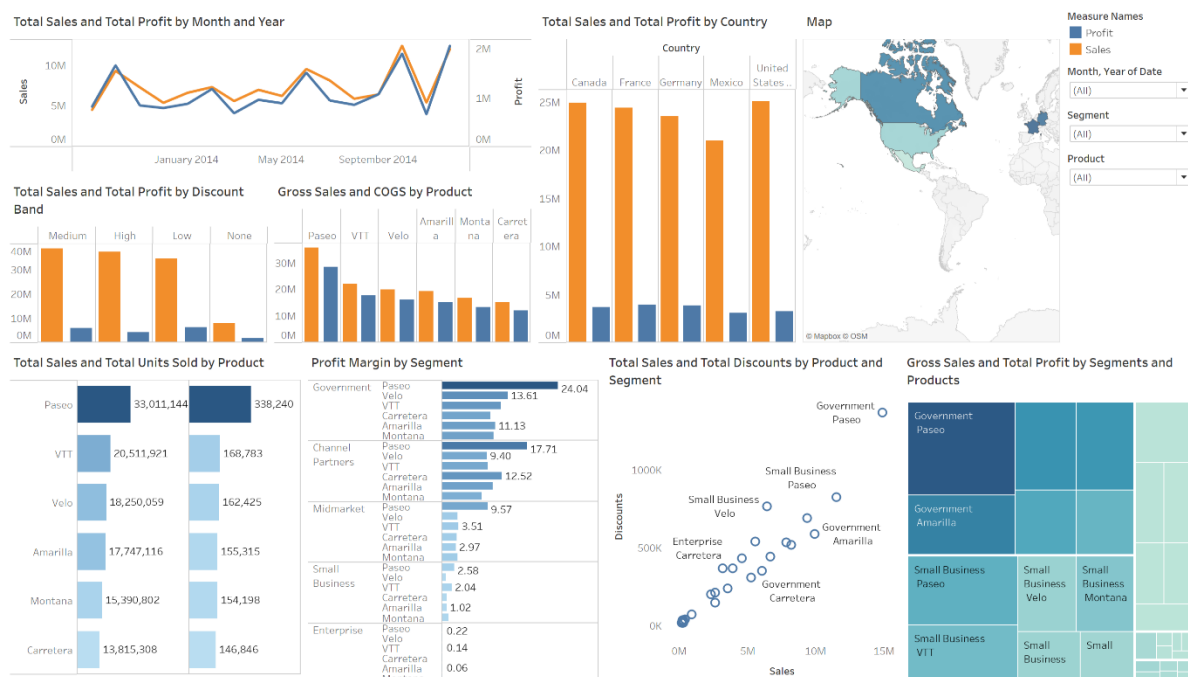
Tableau Dashboard

Tableau Dashboard Link

https://public.tableau.com/views/FinancialPerformanceDashboard_17259501143300/FinancialPerfo rmaneDashboard?:language=en-US&publish=yes&:sid=&:redirect=auth&:display_count=n&:origin=viz_share_link