Sales Analysis using Revenue Filter

A Data-Driven Insights Report

Introduction

Stakeholders across various departments lack a consolidated view to analyze sales performance across U.S. states, customers, employees, and products over different time windows. This limits their ability to identify geographic trends, top customers, high-performing employees, and key products that drive business revenue. There is also limited visibility into how performance differs across Gross, Net, and Profit revenue metrics.

This dashboard is especially valuable for:

- Regional Managers – To assess performance by state and allocate resources more efficiently.
- Sales Leaders – To monitor top-performing employees and customers for recognition or support.
- Marketing Teams – To focus promotions on products and regions that show the highest potential.
- Finance Teams – To switch between gross, net, and profit views for financial clarity.

Objective

- Analyze State-Level Revenue Contribution
- Identify Top Performing Customers and Employees
- Monitor Product Performance
- Enable Multi-Metric Revenue Comparison
- Empower Time-Based Filtering

Key Questions

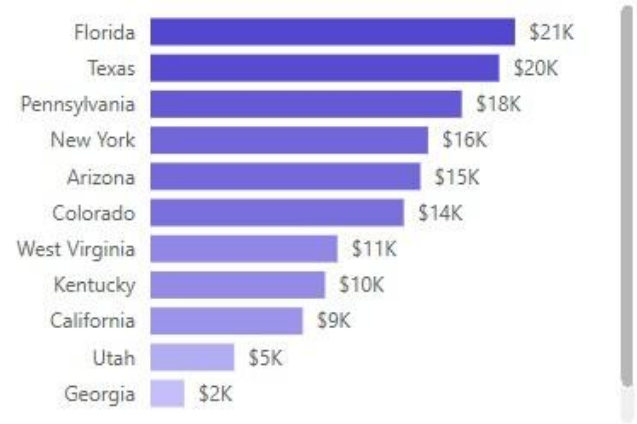
- Which states generate the highest sales revenue?
- Who are the top 10 customers and what is their individual contribution?
- What are the top 5 products and their share of total revenue?
- How does performance differ when viewing Gross vs Net vs Profit revenue?

Gross | Net | Profit

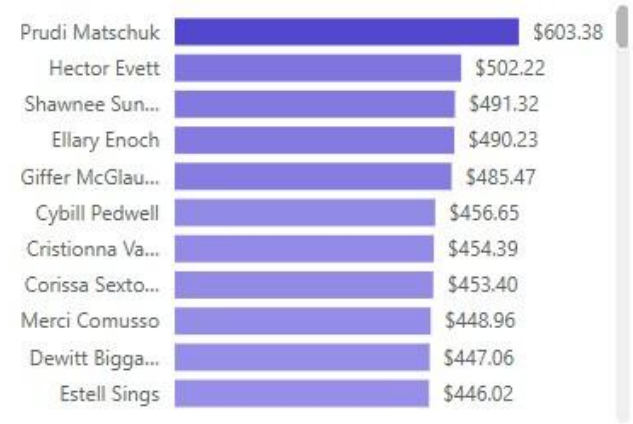
Sales Analysis

3 Days | 7 Days | 30 Days | 1 Year | Total

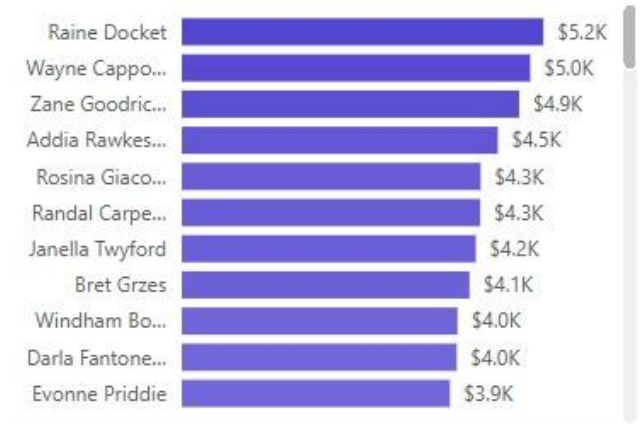
State

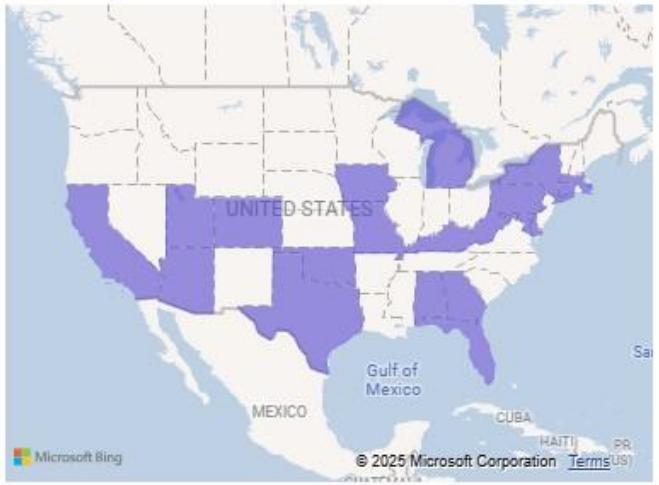


Customer Name

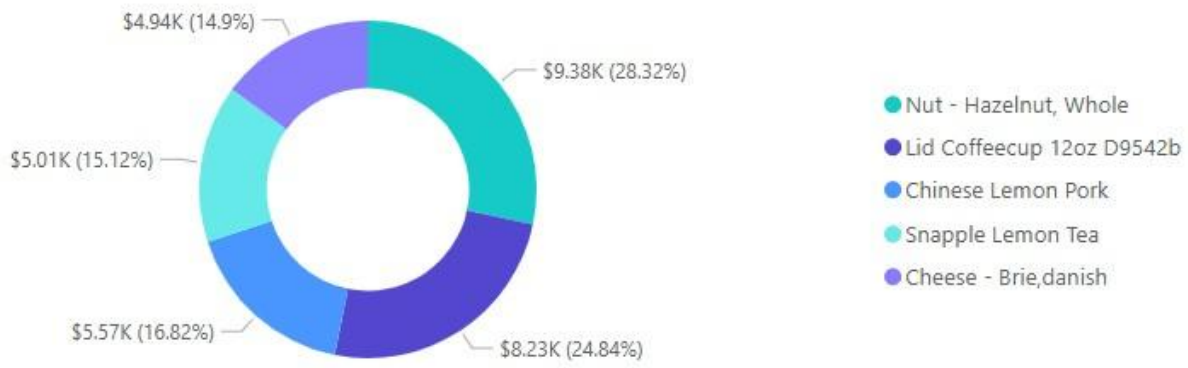


Employee Name





Top 5 Products



Revenue by State

Insights

- Florida ($21K) and Texas ($20K) are the top-performing states, contributing the highest revenue.
- Mid-performing states include Pennsylvania, New York, Arizona, and Colorado, ranging from $14K to $18K.
- States like Georgia ($2K), Utah ($5K), and California ($9K) contribute significantly less, indicating revenue concentration in certain regions.

Challenges

- Geographic Imbalance - A large portion of revenue is generated from just a few states, creating overdependence on specific markets.
- Underutilized Territories - Several states have low revenue potential (e.g., Georgia, Utah)

Recommendations

- Expand sales initiatives or campaigns in mid- and low-performing states to reduce dependency on top contributors.
- Perform a root-cause analysis in low-revenue states to uncover barriers (e.g., product availability, logistics, competition).

Revenue by Customer (Name)

Insights

- The top 10 customers all contribute closely in the $446–$603 range, showing a tight cluster of high-value clients.
- Prudi Matschuk is the top revenue-generating customer, contributing $603.38, significantly higher than the rest.
- The chart reveals a clear concentration of revenue among a small number of customers, useful for strategic targeting.

Challenges

- Heavy reliance on a few customers (like Prudi Matschuk) can pose a business continuity risk if those clients churn.
- The chart only shows top contributors, masking the performance of mid- and low-tier customers who may have growth potential.

Recommendations

- Develop strategies (loyalty programs, targeted outreach) to nurture mid-tier customers and reduce overdependence on a few individuals..
- Introduce customer segmentation in the dashboard (e.g., by frequency, tenure, region) to better understand and serve different customer groups.

Running Total By Date

Insights

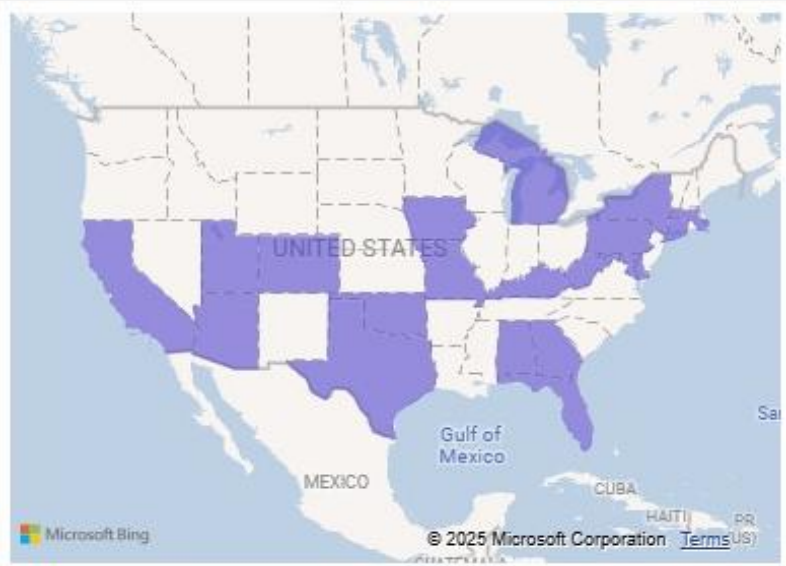
- The map highlights key revenue-generating states like Texas, Florida, Michigan, and Pennsylvania, providing a geographic overview of business presence.
- There is a noticeable concentration of activity in the South, Midwest, and East Coast, suggesting these regions are strategic revenue zones.

Challenges

- A significant portion of the U.S., shows no shading—indicating zero or minimal revenue activity in those areas.

Recommendations

- Investigate the untapped states to determine feasibility for expansion—through lead generation, partnerships, or regional campaigns.



Top 5 Products by Revenue

Insights

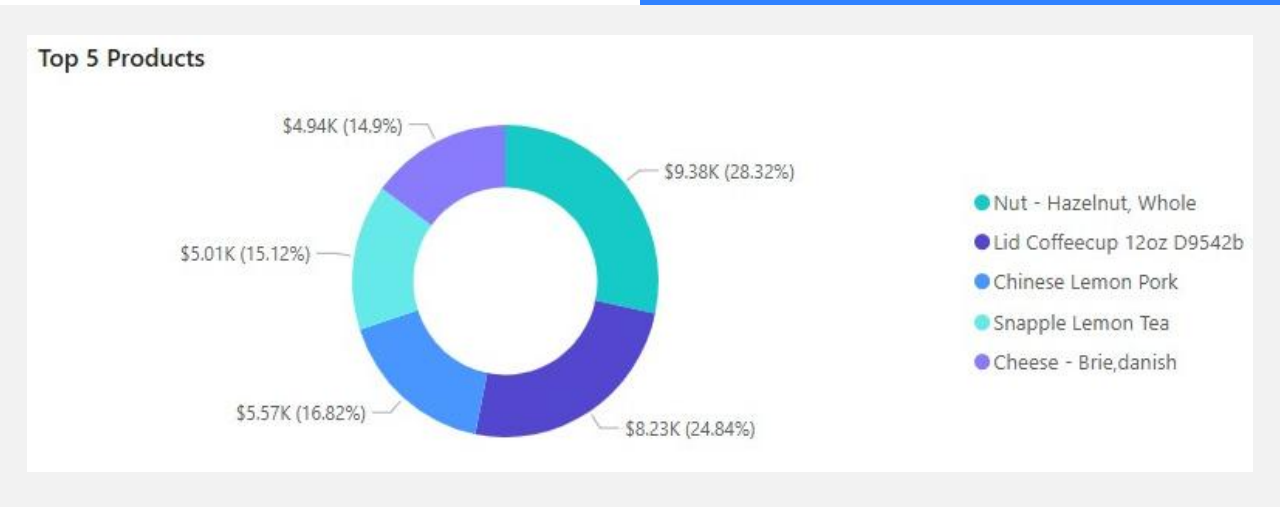
- Nut - Hazelnut, Whole leads with $9.38K (28.32%), followed by Snapple Lemon Tea ($8.23K, 24.84%), together accounting for over 50%
  of the top product revenue.
- All five products are fairly strong performers, each contributing between 14.9% to 28.3%, indicating a diverse and profitable product mix.

Challenges

- The top two products make up more than half of the revenue, posing a risk if demand drops or supply issues arise.
- The chart shows a static snapshot—it doesn't reveal whether these products are gaining or losing momentum over time.

Recommendations

- Add a line or column chart alongside this visual to monitor product sales trends monthly or quarterly for early signals of change.
- Pair this chart with a gross margin or net profit breakdown to ensure decisions are based on profit, not just revenue.



Outcome

By taking action on these insights and recommendations, stakeholders, senior level leadership and managers can benefit in many ways such as:

- Geographic Sales Insights Enable Strategic Expansion - The state-wise revenue bar chart and filled map reveal key sales regions like Florida, Texas, and Pennsylvania. This helps stakeholders identify top-performing territories and spot underperforming regions for targeted marketing, sales rep allocation, or new business development.

- Customer-Level Visibility Aids Retention and Upselling - The Customer Name bar chart highlights high-value customers like Prudi Matschuk and Hector Evett, making it easy to prioritize retention efforts and develop personalized upselling strategies for top contributors.

- Employee Performance Comparison - The Employee Name visual ranks employees by revenue generated, enabling stakeholders to reward top performers and identify those who may need additional support or training, which boosts morale and overall productivity.

- Product Mix Analysis Drives Inventory and Promotion Planning -The Top 5 Products donut chart showcases leading items like Nut - Hazelnut, Whole and Snapple Lemon Tea, providing insights for inventory optimization, pricing strategies, and seasonal promotions to maximize revenue from bestsellers.

Leveraging the insights from this dashboard, stakeholders across sales and marketing can prioritize high-value customers and top-selling products, while also pinpointing low-performing states, employees, or segments that require attention. The built-in interactive slicers, such as time filters (3 Days to 1 Year) and metric toggles (Gross, Net, Profit), enable users to dive into specific performance areas and effortlessly adjust their view for different business scenarios. This streamlined, user-friendly experience facilitates faster, data-backed decision-making, helping teams track trends, optimize campaigns, and align efforts to drive sustainable revenue growth.

Thank You!