



# Sales Analysis using Top N Filter

A Data-Driven Insights Report

# Introduction

The Sales Analysis dashboard fills this need by offering an interactive interface that allows users to filter sales data by Top N customers, track running totals by month, and analyze revenue contributions by individual products. With time period slicing (e.g., by quarter) and revenue type switching (Gross, Net, Profit), the dashboard enables clear and flexible insight into revenue dynamics.

The dashboard enables stakeholders to:

- To quickly assess overall performance and identify key growth drivers.
- To focus efforts on high-performing clients and products.
- To refine product strategy based on contribution to revenue.
- To evaluate profit margins across customers and timeframes.

## *Objective*

- Identify Top Performing Customers
- Analyze Revenue Breakdown by Type
- Monitor Monthly and Cumulative Sales Trends
- Evaluate Product-Level Revenue Contribution
- Enable Time-Based Sales Comparison

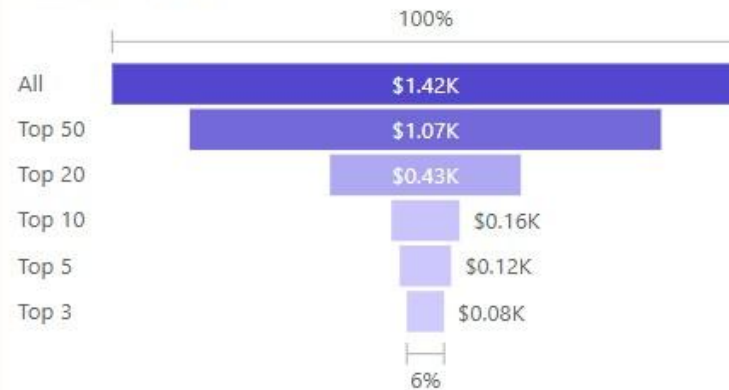
## *Key Questions*

- Which customers are contributing the most to overall revenue in the selected quarter?
- How does revenue differ when filtering by Top 3, Top 10, or Top 50 customers?
- Which products generated the highest revenue in Q2 2017?
- What is the Gross Revenue, Net Revenue, and Gross Profit trend across May and June?

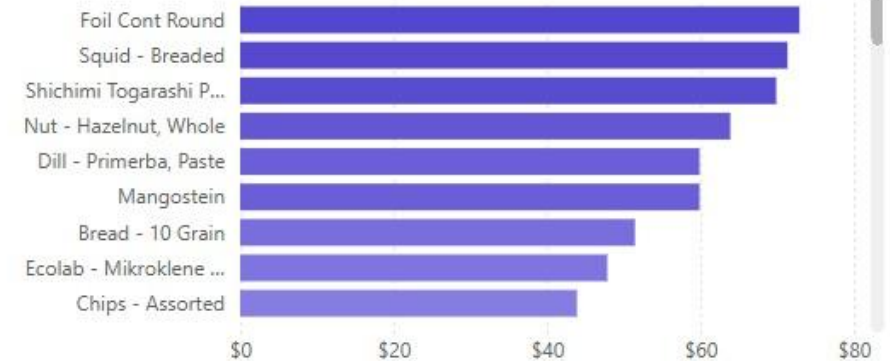
## Sales Analysis

- ☒ Select all
- ☒ Abbe Crecy
- ☒ Adams Delacour
- ☒ Addison Windeatt
- ☒ Adham Bynold
- ☒ Adler Harse
- ☒ Adolpho Bugge
- ☒ Adoree Boram
- ☒ Adrian Wiggall

### Revenue by Top N

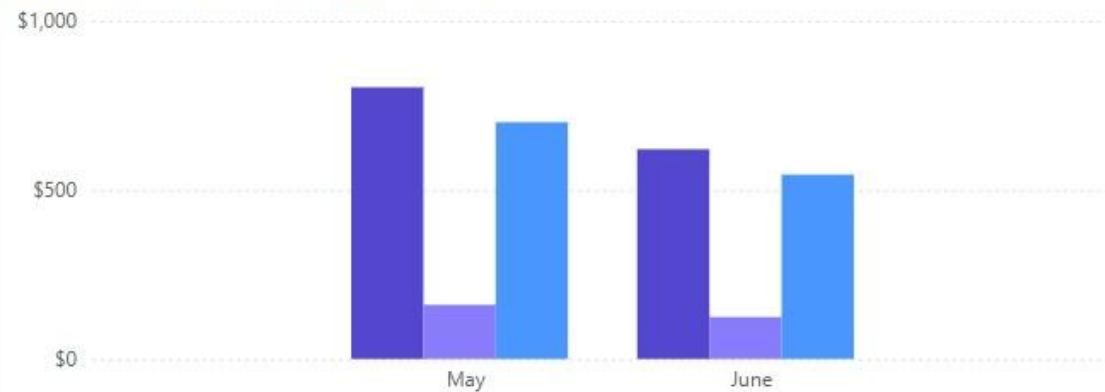


### Products

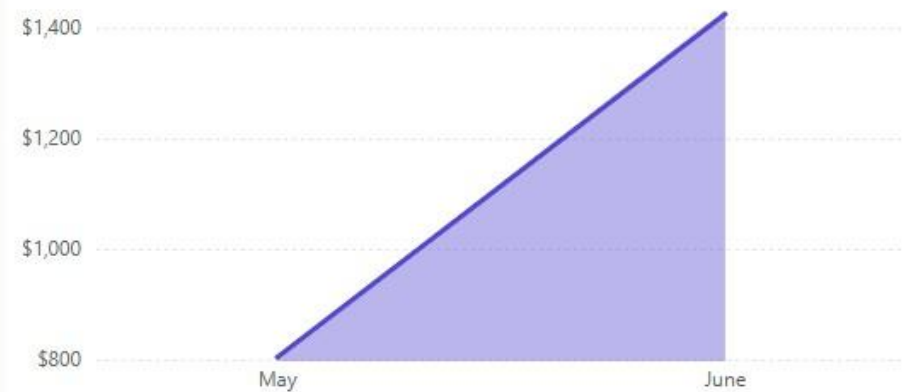


### Revenue by Date

☒ Gross Revenue
 ☒ Gross Profit
 ☒ Net Revenue



### Running Total by Date



# Revenue by Top N

## Insights

- All customers generated approximately \$1.42K in total revenue.
- The Top 50 customers alone contributed ~\$1.07K, which is ~75% of total revenue.
- As the Top N count narrows, the revenue sharply drops, indicating a classic Pareto distribution where ~20% of customers are responsible for ~80% of revenue.

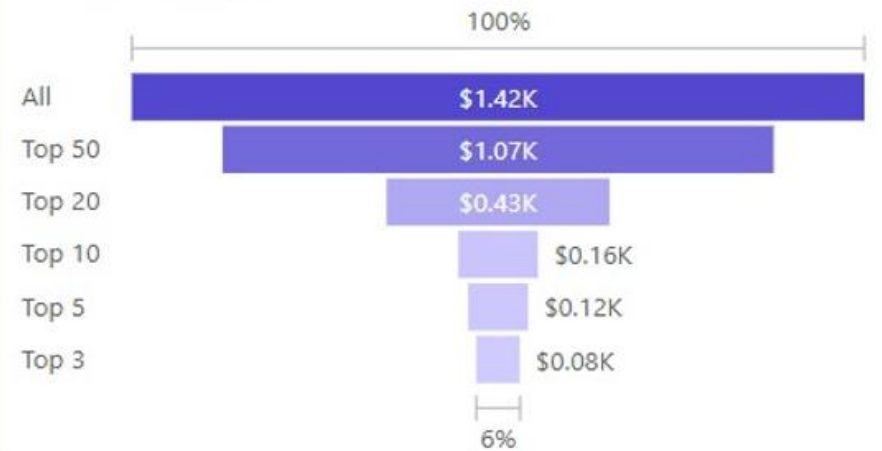
## Challenges

- Long Tail of Low-Contributing Customers, as there is high dependency on top customers.

## Recommendations

- Launch campaigns and loyalty programs to grow revenue from mid-tier or long-tail customers and reduce over-dependence on the Top 50.
- Use product recommendation engines, targeted emails, or promotions to increase average order value for customers outside the Top 20.

Revenue by Top N



# Products List

## Insights

- Foil Cont Round, Squid – Breaded, and Shichimi Togarashi Paste are top sellers.
- These products each generated close to or above \$60 in revenue during the selected quarter.
- Ecolab and Chips were the lowest selling products of the entire list.

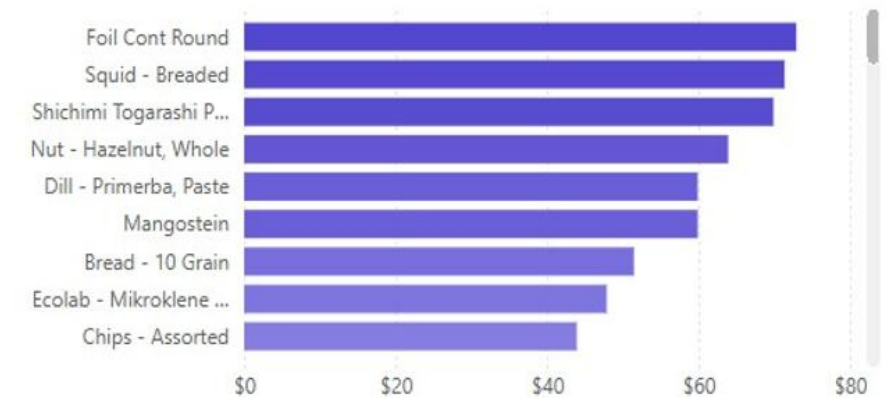
## Challenges

- Revenue Concentration in a Few Products (Top 3)
- Underutilization of Lower-Tier Products (Chips, Ecolab and Bread)

## Recommendations

- Promote mid- and lower-performing products through bundling, targeted campaigns, or discounts to boost overall product portfolio performance.
- Use basket analysis to identify which low-performing products are frequently bought with top performers and bundle them to increase exposure.

### Products



# Revenue By Date

## Insights

- Gross Revenue was higher in May than in June, with May exceeding \$900, and June slightly below that.
- Gross Profit, however, remains significantly lower (~\$100–\$150 range), which could indicate high cost of goods sold (COGS) or operating expenses.
- Net Revenue closely tracks Gross Revenue, suggesting low discounting or operational costs.

## Challenges

- Decline in Revenue Over Time (Gross and Net)
- Low Gross Profit Margin

## Recommendations

- Drill down into sales by product, region, and customer to identify why revenue dropped in June.
- Overlay the chart with previous year values or forecasted revenue to track whether performance is improving or lagging behind expectations.



# Running Total By Date

## Insights

- The cumulative revenue is growing steadily from May to June, reaching over \$1,400.
- This indicates consistent sales performance without revenue drops, although the slope slightly flattens in June, which aligns with lower revenue seen in the bar chart.

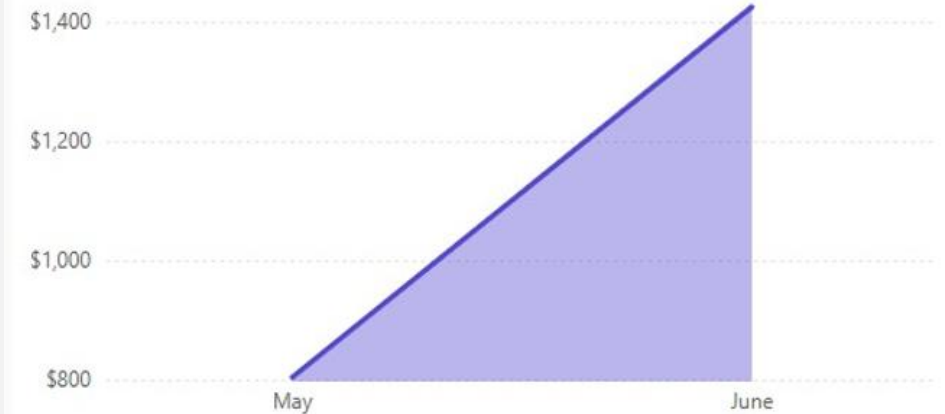
## Challenges

- Limited Time Frame of only 2 months, May and June.

## Recommendations

- Add more months (e.g., a full quarter or year) to visualize revenue accumulation over time and better assess trends, dips, or peaks.
- Overlay the chart with previous year values or forecasted revenue to track whether performance is improving or lagging behind expectations.

Running Total by Date



# Outcome

By taking action on these insights and recommendations, stakeholders, senior level leadership and managers can expect to:

- Prioritize High-Value Customers - Focus efforts on top-performing customers who contribute the majority of revenue, enhancing retention strategies and personalized engagement.
- Maximize Product Profitability - Identify best-selling products and align marketing or bundling strategies to capitalize on high-revenue items while phasing out underperformers.
- Enhance Sales Targeting - Use Top N and quarterly filters to analyze sales trends and performance across time, enabling timely adjustments in campaigns and outreach.
- Drive Data-Backed Decision Making - Access a centralized, interactive view of sales by customer, product, and period—supporting faster, evidence-based decisions across departments.
- Improve Forecasting & Planning - Running totals and time filters offer a clear view of revenue momentum, helping stakeholders set realistic targets and proactively manage resources.

By utilizing the insights from this dashboard, sales and marketing teams can strategically focus on top-revenue-generating customers and high-performing products, while also identifying and addressing underperforming segments with targeted, data-driven actions. The interactive filters—such as Top N selectors and quarterly views - allow users to seamlessly drill into specific metrics and reset views for flexible exploration. This intuitive experience supports quick, informed decisions and empowers stakeholders to monitor performance trends, refine sales strategies, and ultimately contribute to overall business growth.





Thank You!