

## The "Retail-First" Project Walkthrough

I focused on demonstrating the exact hindsight analysis and B2B partner logic required for the AEO role.

- The Data Engine (The Raw Layer): I started with a granular Retailer Dataset. I engineered this to handle multi-dimensional data, including Retailer IDs, Invoice Dates, and specific Beverage (**Coca Cola- Case Study**) Brands. I ensured every transaction tracks Units Sold, Price per Unit, and Operating Margin, this is the foundational data needed for any Merchandise Financial Plan.
- The Planning Logic (The Pivot Layer): I then built a 'Connected Planning' engine using Pivot Tables. This allowed me to perform Hindsight Analysis by comparing Sales 2022 vs. 2023 to identify volume variances. I specifically focused on Sum of Total Sales across retailers like Amazon and Walmart, which mimics how I would manage AEO's B2B partners like Macy's or Nordstrom on the NuOrder platform.
- The Strategic Insights (The Dashboard): The final output is a Retailer Dashboard. It provides an immediate view of our Operating Profit (\$4.7M) and Total Units Sold (\$24.7M). More importantly, it features a Sales and Operating Profit Margin by Quarter chart. This tells the 'story' of our Assortment Planning, showing exactly when and where our margins spiked so leadership can optimize inventory allocation for the next season.

While I built this in Excel, the data modeling logic, reconciling transaction-level data into high-level business rules, is exactly what powers an Anaplan model. I'm ready to bring this same rigor to AEO.

Raw Data : 10000 Rows

Retailer Dataset											
Retailer	Retailer ID	Invoice Date	Region	State	City	Beverage Brand	Price per Unit	Units Sold	Total Sales	Operating Profit	Operating Margin
BevCo	1185732	1/1/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,000	\$6,000	\$3,000	50%
BevCo	1185732	1/2/22	Northeast	New York	New York	Diet Coke	\$0.50	10,000	\$5,000	\$1,500	30%
BevCo	1185732	1/3/22	Northeast	New York	New York	Sprite	\$0.40	10,000	\$4,000	\$1,400	35%
BevCo	1185732	1/4/22	Northeast	New York	New York	Fanta	\$0.45	8,500	\$3,825	\$1,339	35%
BevCo	1185732	1/5/22	Northeast	New York	New York	Powerade	\$0.60	9,000	\$5,400	\$1,620	30%
BevCo	1185732	1/6/22	Northeast	New York	New York	Dasani Water	\$0.50	10,000	\$5,000	\$1,250	25%
BevCo	1185732	1/7/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,500	\$6,250	\$3,125	50%
BevCo	1185732	1/8/22	Northeast	New York	New York	Diet Coke	\$0.50	9,000	\$4,500	\$1,350	30%
BevCo	1185732	1/21/22	Northeast	New York	New York	Sprite	\$0.40	9,500	\$3,800	\$1,330	35%
BevCo	1185732	1/22/22	Northeast	New York	New York	Fanta	\$0.45	8,250	\$3,713	\$1,299	35%
BevCo	1185732	1/23/22	Northeast	New York	New York	Powerade	\$0.60	9,000	\$5,400	\$1,620	30%
BevCo	1185732	1/24/22	Northeast	New York	New York	Dasani Water	\$0.50	10,000	\$5,000	\$1,250	25%
BevCo	1185732	1/25/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,200	\$6,100	\$3,050	50%
BevCo	1185732	1/26/22	Northeast	New York	New York	Diet Coke	\$0.50	9,250	\$4,625	\$1,388	30%
BevCo	1185732	1/27/22	Northeast	New York	New York	Sprite	\$0.40	9,500	\$3,800	\$1,330	35%
BevCo	1185732	1/28/22	Northeast	New York	New York	Fanta	\$0.45	8,000	\$3,600	\$1,260	35%
BevCo	1185732	1/29/22	Northeast	New York	New York	Powerade	\$0.60	8,500	\$5,100	\$1,530	30%
BevCo	1185732	1/30/22	Northeast	New York	New York	Dasani Water	\$0.50	9,500	\$4,750	\$1,188	25%
BevCo	1185732	1/31/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,000	\$6,000	\$3,000	50%
BevCo	1185732	2/1/22	Northeast	New York	New York	Diet Coke	\$0.50	9,000	\$4,500	\$1,350	30%
BevCo	1185732	2/2/22	Northeast	New York	New York	Sprite	\$0.40	9,000	\$3,600	\$1,260	35%
BevCo	1185732	2/3/22	Northeast	New York	New York	Fanta	\$0.45	8,250	\$3,713	\$1,299	35%
BevCo	1185732	2/4/22	Northeast	New York	New York	Powerade	\$0.60	8,250	\$4,950	\$1,485	30%
BevCo	1185732	2/5/22	Northeast	New York	New York	Dasani Water	\$0.50	9,500	\$4,750	\$1,188	25%
BevCo	1185732	2/6/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,200	\$7,320	\$3,660	50%
BevCo	1185732	2/7/22	Northeast	New York	New York	Diet Coke	\$0.55	9,250	\$5,088	\$1,526	30%
BevCo	1185732	2/8/22	Northeast	New York	New York	Sprite	\$0.50	9,000	\$4,500	\$1,575	35%
Amazon	1185732	2/9/22	Northeast	New York	New York	Fanta	\$0.50	8,500	\$4,250	\$1,488	35%
Amazon	1185732	2/10/22	Northeast	New York	New York	Powerade	\$0.60	8,750	\$5,250	\$1,575	30%
Amazon	1185732	3/3/22	Northeast	New York	New York	Dasani Water	\$0.65	10,000	\$6,500	\$1,625	25%
Amazon	1185732	3/4/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,500	\$7,500	\$3,750	50%
Amazon	1185732	3/5/22	Northeast	New York	New York	Diet Coke	\$0.55	10,000	\$5,500	\$1,650	30%
Amazon	1185732	3/6/22	Northeast	New York	New York	Sprite	\$0.50	9,250	\$4,625	\$1,619	35%
Amazon	1185732	3/7/22	Northeast	New York	New York	Fanta	\$0.50	9,000	\$4,500	\$1,575	35%
Amazon	1185732	3/8/22	Northeast	New York	New York	Powerade	\$0.60	9,000	\$5,400	\$1,620	30%
Amazon	1185732	3/9/22	Northeast	New York	New York	Dasani Water	\$0.65	10,500	\$6,825	\$1,706	25%
Amazon	1185732	3/10/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,750	\$7,650	\$3,825	50%
Amazon	1185732	3/11/22	Northeast	New York	New York	Diet Coke	\$0.55	10,250	\$5,638	\$1,691	30%
Amazon	1185732	3/12/22	Northeast	New York	New York	Sprite	\$0.50	9,500	\$4,750	\$1,663	35%
Amazon	1185732	3/13/22	Northeast	New York	New York	Fanta	\$0.50	9,000	\$4,500	\$1,575	35%
Amazon	1185732	3/14/22	Northeast	New York	New York	Powerade	\$0.60	9,250	\$5,550	\$1,665	30%
Amazon	1185732	3/15/22	Northeast	New York	New York	Dasani Water	\$0.65	11,000	\$7,150	\$1,788	25%
Amazon	1185732	3/16/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,500	\$7,500	\$3,750	50%
Amazon	1185732	3/17/22	Northeast	New York	New York	Diet Coke	\$0.55	10,250	\$5,638	\$1,691	30%
Amazon	1185732	3/18/22	Northeast	New York	New York	Sprite	\$0.50	9,000	\$4,500	\$1,562	35%

## Dynamic Dashboard with Power Pivot and Chart



**Region**

Midwest
Northeast
South
Southeast
West

**Years (Invoice ...**

2022
2023

Last Update Jan 2024

### Coca - Cola USA Retailer Dashboard

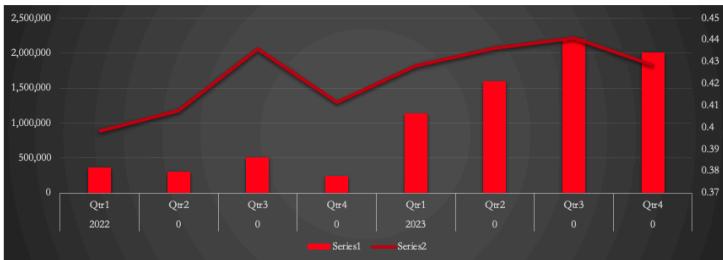
Figures in USD

Total Sales  
\$8,373,616
Units Sold  
17,918,760
Avg Price  
\$0.44
Operating Profit  
\$3,420,987

Sales by Beverage Brand			
Brand	Sales 2022	Sales 2023	Variance
Coca-Cola	294,892	1,734,288	1,439,396
Dasani Water	281,055	1,402,309	1,121,254
Diet Coke	235,912	1,145,765	909,853
Fanta	183,376	781,201	597,825
Powerade	220,368	949,051	728,683
Sprite	206,341	939,058	732,717
<b>Grand Total</b>	<b>1,421,944</b>	<b>6,951,672</b>	<b>5,529,728</b>

Sales by Retailer			
Retailer	Sales 2022	Sales 2023	Variance
Amazon	276,214	845,811	569,597
BevCo	448,933	1,840,257	1,391,324
FizzyCo	161,217	2,097,104	1,935,887
Target	9,252	486,921	477,669
Walmart	339,920	496,927	157,007
West Soda	186,408	1,184,652	998,244
<b>Grand Total</b>	<b>1,421,944</b>	<b>6,951,672</b>	<b>5,529,728</b>

**Sales and Operating Profit Margin by Quarter**



Quarter	Series 1 (Sales)	Series 2 (Margin)
Qtr1 2022	~400,000	~0.385
Qtr2 2022	~300,000	~0.395
Qtr3 2022	~500,000	~0.405
Qtr4 2022	~200,000	~0.395
Qtr1 2023	~1,100,000	~0.415
Qtr2 2023	~1,500,000	~0.425
Qtr3 2023	~2,100,000	~0.435
Qtr4 2023	~1,900,000	~0.425



**Region**

Midwest
Northeast
South
Southeast
West

**Years (Invoice ...**

2022
2023

### Coca - Cola USA Retailer Dashboard

Figures in USD

Total Sales  
\$2,137,538
Units Sold  
4,070,000
Avg Price  
\$0.50
Operating Profit  
\$839,346

Sales by Beverage Brand			
Brand	Sales 2022	Sales 2023	Variance
Coca-Cola	84,858	384,545	299,687
Dasani Wate	76,837	334,150	257,313
Diet Coke	59,943	305,437	245,494
Fanta	48,150	219,270	171,120
Powerade	66,212	252,130	185,918
Sprite	51,427	254,579	203,152
<b>Grand Total</b>	<b>387,427</b>	<b>1,750,111</b>	<b>1,362,684</b>

Sales by Retailer			
Retailer	Sales 2022	Sales 2023	Variance
Amazon	0	133,215	133,215
BevCo	117,390	659,472	542,082
FizzyCo	114,881	589,216	474,335
Walmart	0	299,210	299,210
West Soda	155,156	68,998	-86,158
<b>Grand Total</b>	<b>387,427</b>	<b>1,750,111</b>	<b>1,362,684</b>
	<b>0</b>	<b>0</b>	<b>2,725,368</b>

