

Sales & Customer Insights

Executive Summary - How is my Overall Sales performance at National level?	Regional Insights - How are my Sales at Regional Level? Any interesting insights for Regional Sales Manag..	Customer Insights - How do I better understand my Customer Profile?	Supplemental Information
--	---	---	--------------------------

Executive Summary Dashboard

Data Source: <https://github.com/stanley-george-joseph/Customer-Analysis-Tableau>

<div>\$159.20M</div> <div>Sales for 2021</div>	<div>126,436</div> <div>Orders placed in 2021</div>	<div>42,631</div> <div>Total Customers in 2021</div>	<div>9,023</div> <div>Loyal Customers in 2021</div>	<div>2.97</div> <div>Avg. Orders per Customer in 2021</div>
--	---	--	---	---

Select View

Map View

Tree Map

Year

2021

Sales

\$0.17M

\$10.92M

* Map View

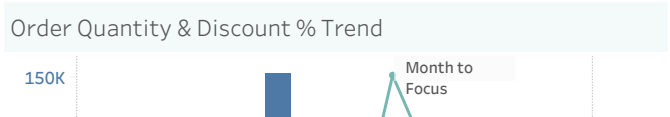
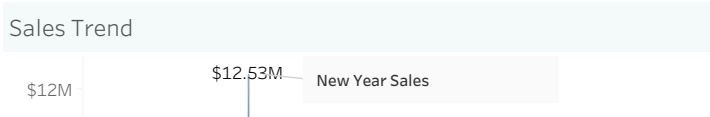
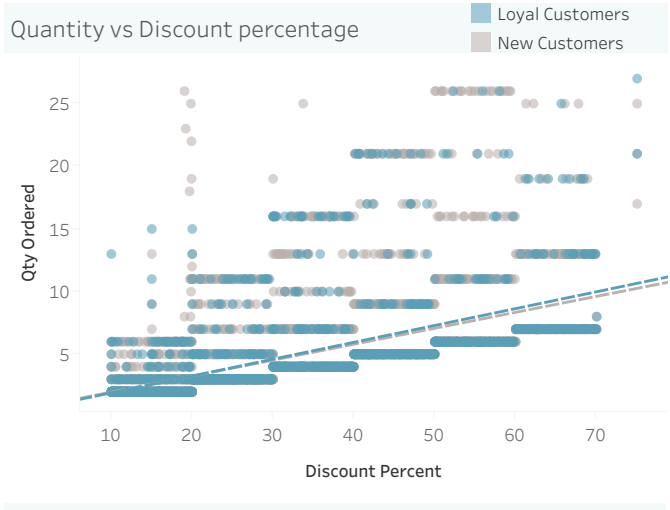
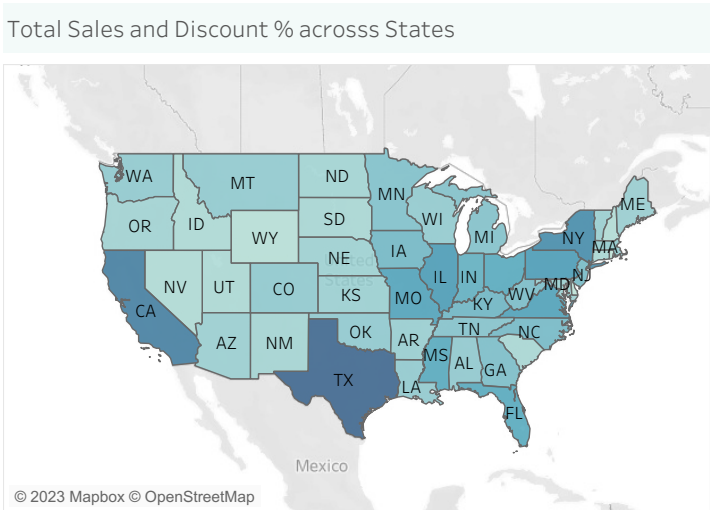
Avg. Discount Amount

* Tree Map

Null

Region

All



Sales & Customer Insights

Executive Summary - How is my Overall Sales performance at National level?

Regional Insights - How are my Sales at Regional Level?
Any interesting insights
for Regional Sales Manag..

Customer Insights - How do I better understand my Customer Profile?

Supplemental Information

Regional Sales Manager Dashboard

Data Source: <https://github.com/stanley-george-joseph/Customer-Analysis-Tableau>

South
\$61.07M


Midwest
\$43.48M

West
\$27.59M

Northeast
\$27.06M

Year
2021

Sales

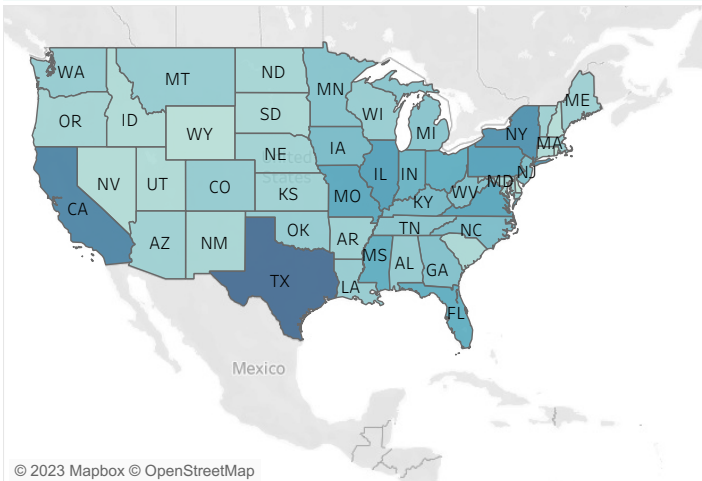


\$169,506.85 11M

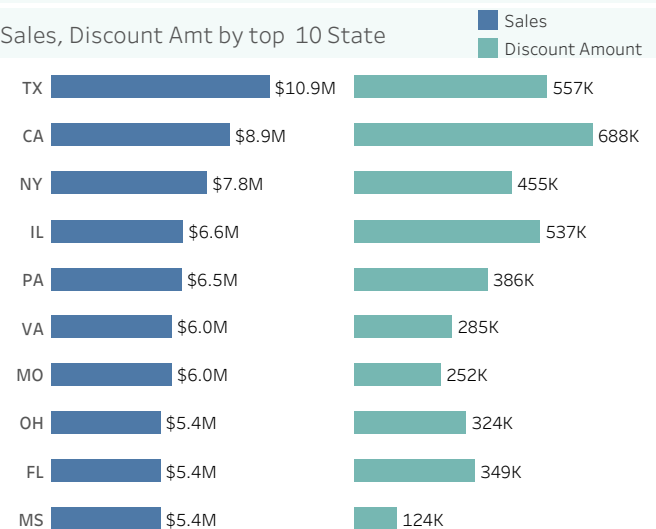
Select Region Level
State

Top N
10

Sales by States



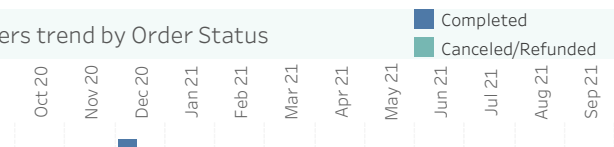
Sales, Discount Amt by top 10 State



Category Heat Map by Time Period



Orders trend by Order Status

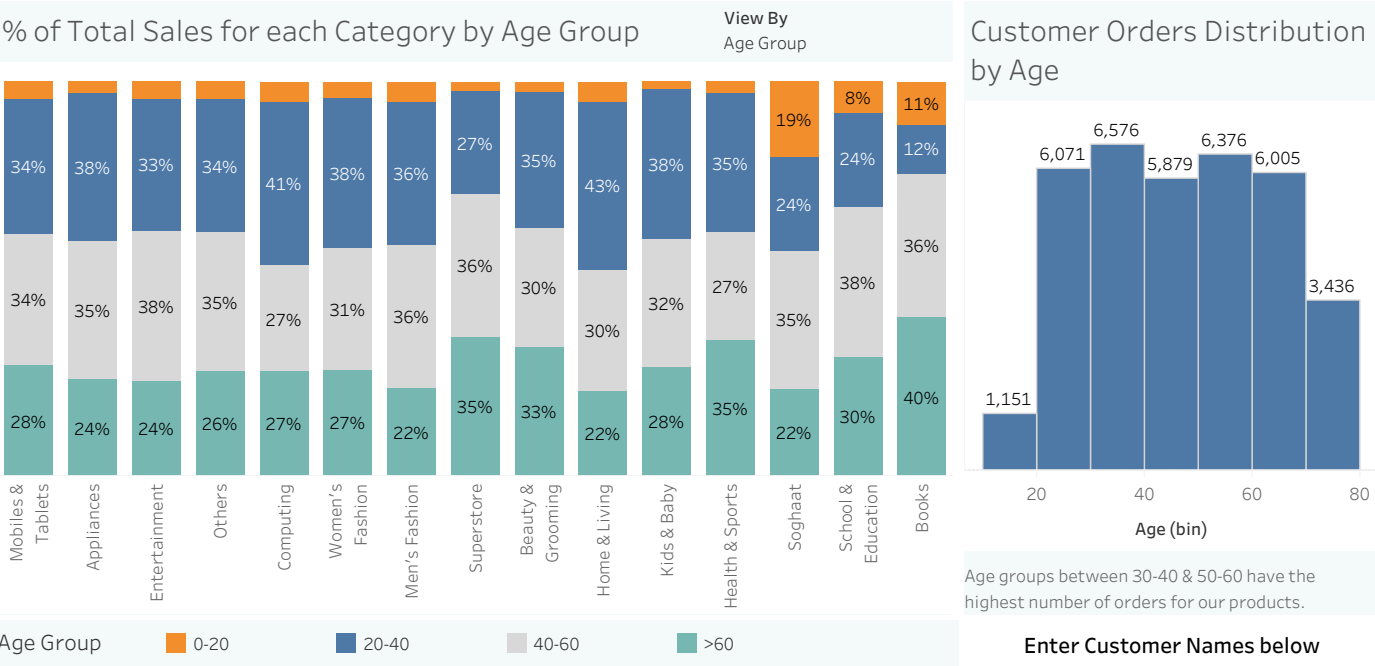


Sales & Customer Insights

Executive Summary - How is my Overall Sales performance at National level?	Regional Insights - How are my Sales at Regional Level? Any interesting insights for Regional Sales Manag..	Customer Insights - How do I better understand my Customer Profile?	Supplemental Information
--	---	---	--------------------------

Customer Insights Dashboard

Data Source: <https://github.com/stanley-george-joseph/Customer-Analysis-Tableau>



Top 10 Customers by Sales			Customer Insights for Cobb, Joleen	
1	Dobbins, Everette	\$1,900.29K		
2	Cobb, Joleen	\$1,628.44K		
3	Bhatt, Graham	\$1,568.18K		
4	Jauregui, Bianca	\$1,368.42K		
5	Beebe, Hortencia	\$1,295.99K		

Customer Details

Customer Full Name: **Cobb, Joleen**
Email Address: joleen.cobb@yahoo.ca
Customer Phone: **228-583-8743**

Customer Insights

Total Sales: **\$1,628,440**
Total Orders placed: **94**

Sales & Customer Insights

Executive Summary - How is my Overall Sales performance at National level?	Regional Insights - How are my Sales at Regional Level? Any interesting insights for Regional Sales Manag..	Customer Insights - How do I better understand my Customer Profile?	Supplemental Information
--	---	---	--------------------------

Supplemental Dashboard

Data Source: <https://github.com/stanley-george-joseph/Customer-Analysis-Tableau>

Background Information

The dataset was created for data analytics purposes, hence it was populated with primarily fictitious data points. The data set is built to replicate one of a retail company, with relevant details of customer and order/product information. Each row represents an order of a particular product by a customer, meaning each order can comprise of multiple rows. Each product belongs to a category. Each order is associated with a date and geographic location.

Summary

We want to create different dashboards that can be leveraged by different levels of management, ranging from executive levels down to day-to-day operational managers.

The "Executive Summary" dashboard provides high level summary of several nation-wide key performance indicators. It offers Chief Executives a snapshot into the health of the company, in terms of sales, across the different years and various measuring characteristics.

The "Regional Sales" dashboard provides a drill-down level of details to the different regions, states, and cities. This offers Regional Managers insights into each product category sales performance across the months.

The "Customer Insights" dashboard provides another layers of details, mainly insights into the composition of company's customer base by age group, gender, and loyalty. This can provide a basis for target advertising to a certain customer profile.

Recommendations

Based on our analysis, we have identified several interesting points that may result in potential actions to take by the company:

1. According to the Executive Summary, the majority of sales occur during the holiday season (Christmas and New Year). Therefore, it may be beneficial to increase promotional offers (or discount percentages) during these seasons to further improve sales.
2. According to the Executive Summary, there is a discrepancy between order quantity and average discount percentage in the months of February and June 2021, unlike the other months. The company may need to investigate whether offering a higher discount percentage will improve sales.
3. According to the Regional Sales Manager, there are more orders with a cancelled status than completed orders in the latter months of June to September 2021. This may indicate that customers are dissatisfied with the company's products and that immediate action is required.
4. Per the Executive Summary, there is a positive correlation with order quantity, and discount percentage. Introducing a Loyalty Program would allow the company could offer higher discounts to loyal customers in order to encourage them to place larger orders.