Regional Sales Analysis – Tableau Project

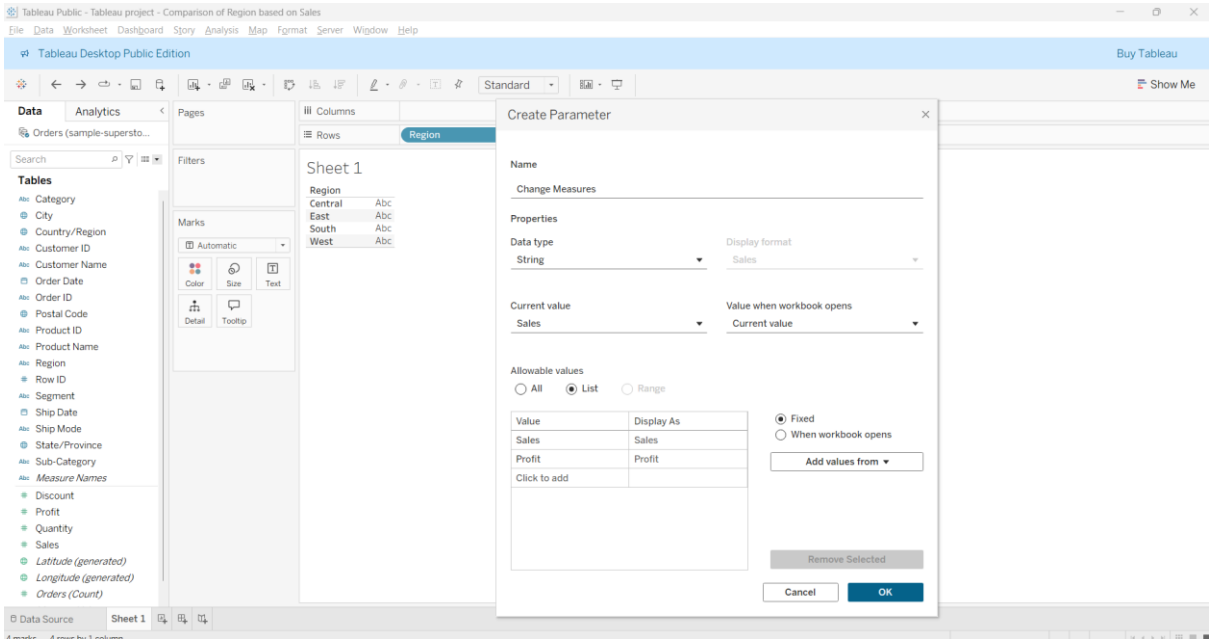
1. Introduction

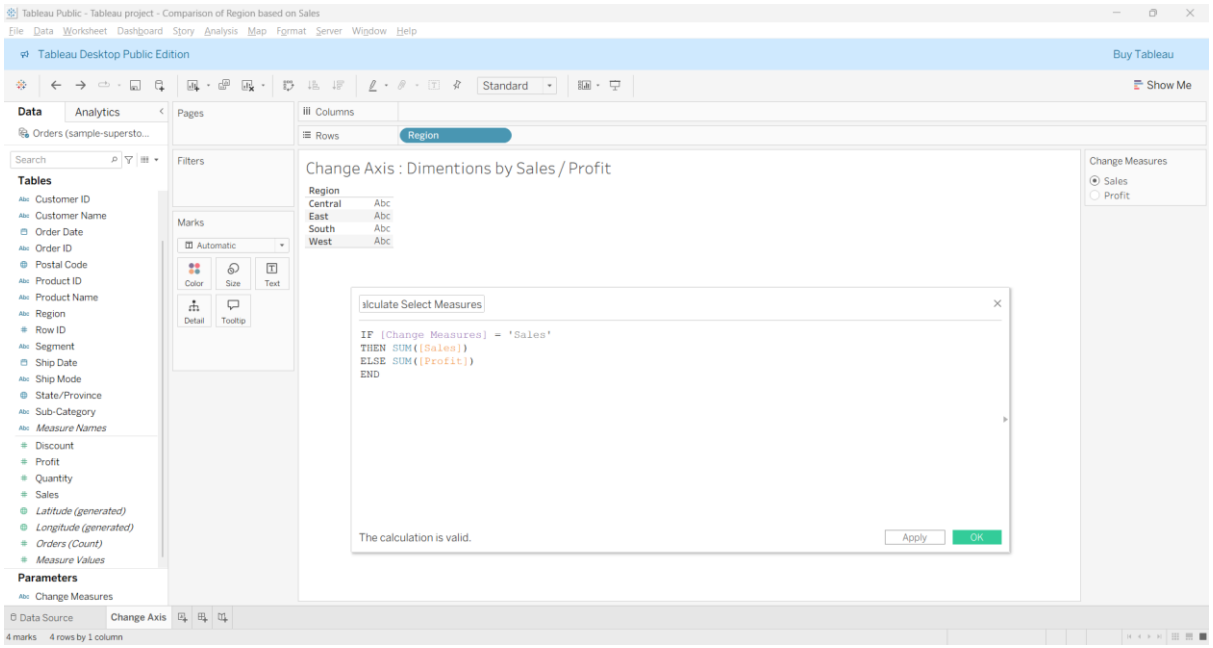
This project aims to analyse and compare the sales performance of two selected regions using Tableau. The dashboard highlights regional trends, KPIs, and areas for improvement, providing actionable insights for management to make informed decisions.

2. Step-by-Step Process

Step 1: Created Parameter for X-Axis

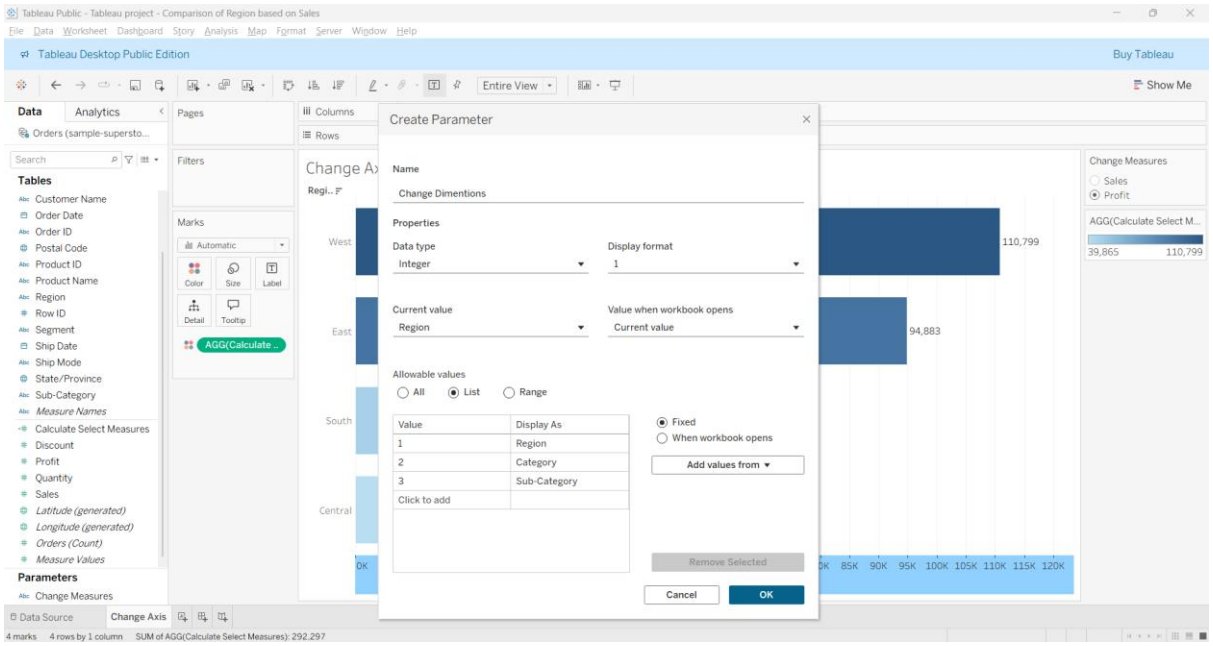
- **Action:** Created a parameter to allow users to switch between different measures on the X-axis.
- **Supporting Work:** Added calculated field linked to this parameter.
- **Value:** Provides flexibility in analysis by enabling measure comparison dynamically.

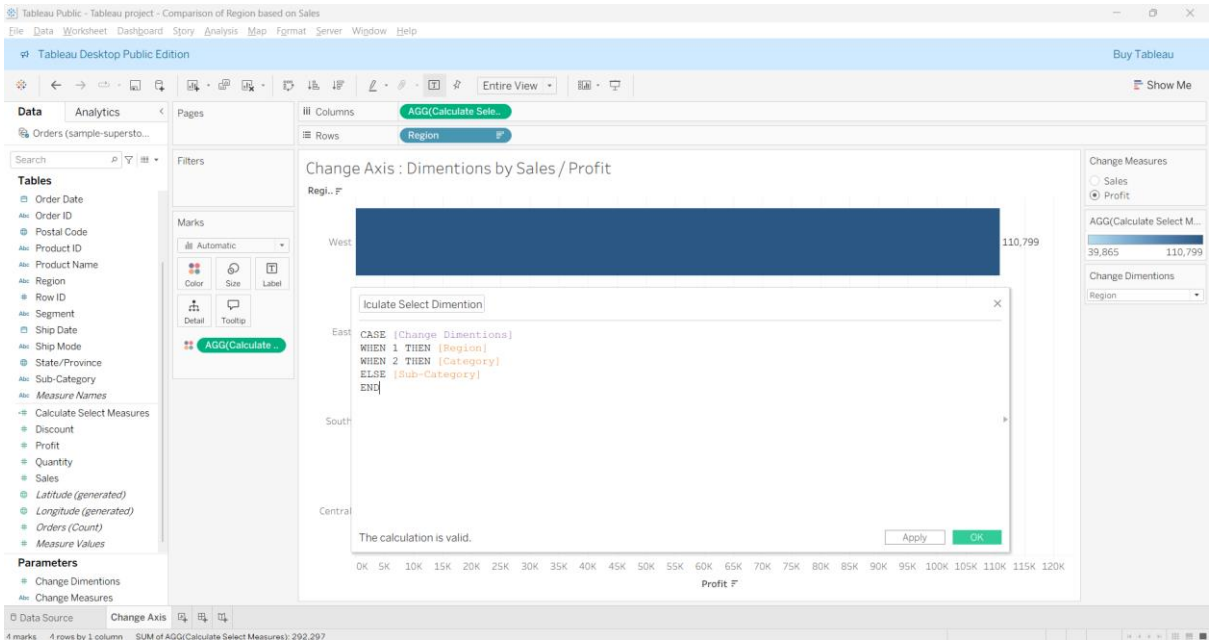




Step 2: Created Parameter for Y-Axis

- **Action:** Created a parameter to allow switching between dimensions for the Y-axis.
- **Supporting Work:** Replaced it with region field in visualizations.
- **Value:** Allows dynamic analysis between different regional categories.



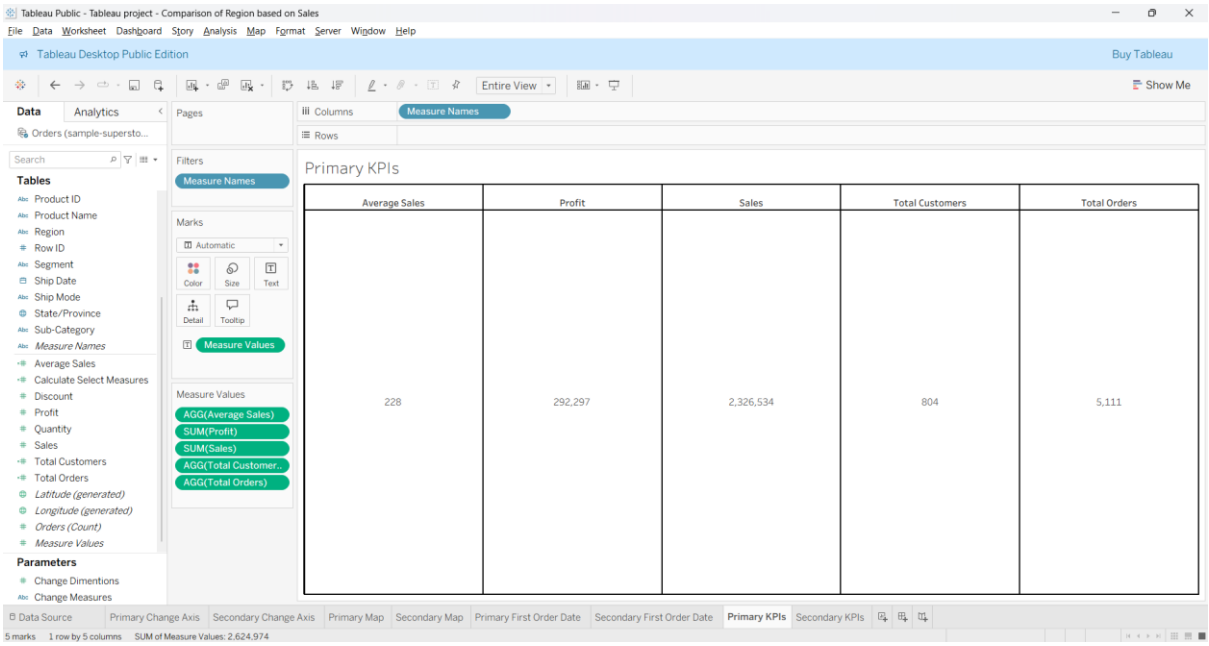


Step 3: Created KPIs and Calculated Fields

KPIs included:

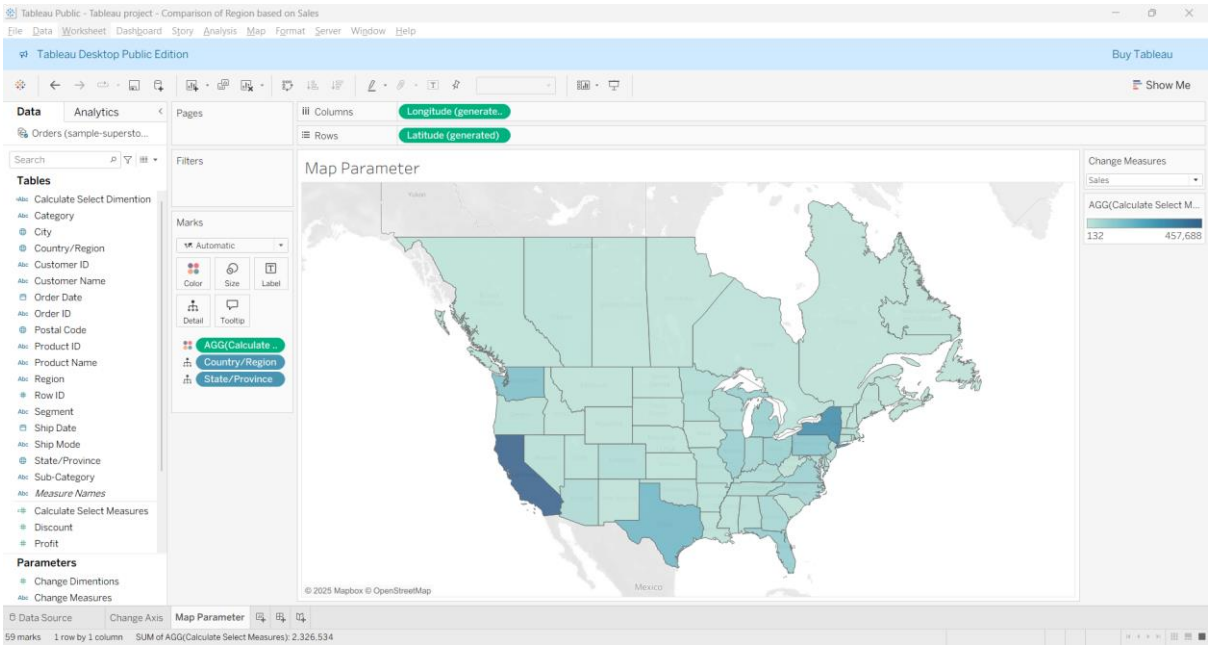
- Total Sales = SUM([Sales])
- Profit = SUM([Profit])
- Total Orders = COUNTD([Order ID])
- Total Customers = COUNTD([Customer ID])
- Average Sales = AVG([Sales])

Value: KPIs provide an executive snapshot for quick decision-making.

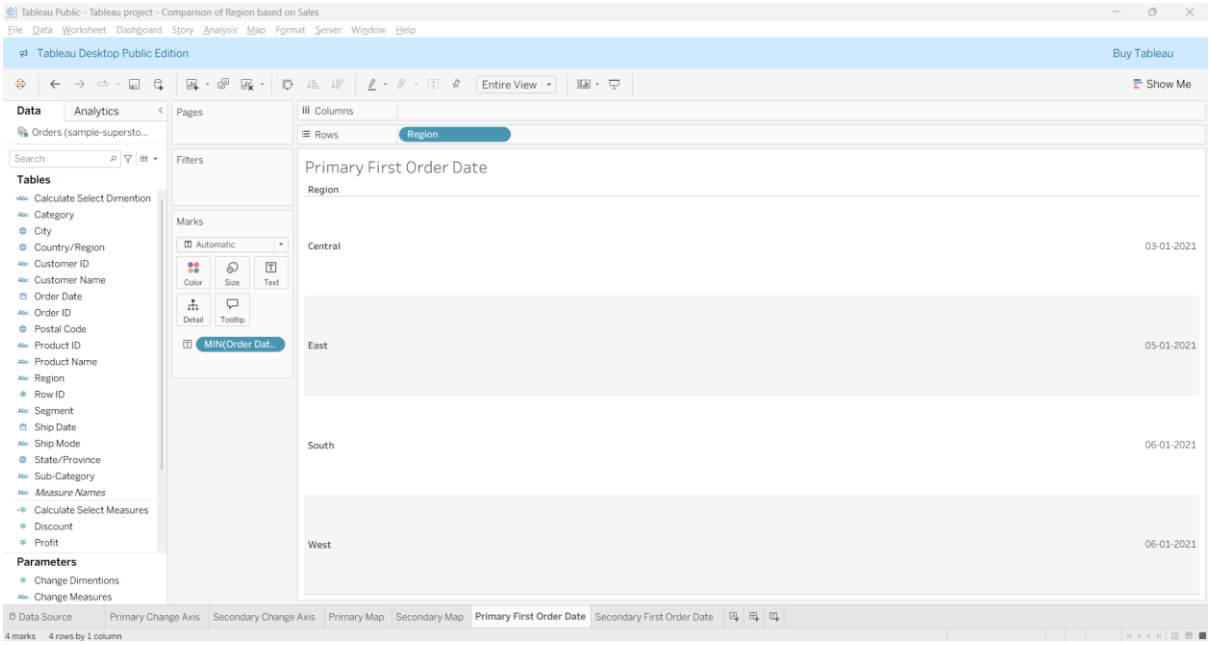


Step 4: Visualization Creation for Comparison of (Primary and Secondary)

- **Map View** – Geographical distribution of sales.

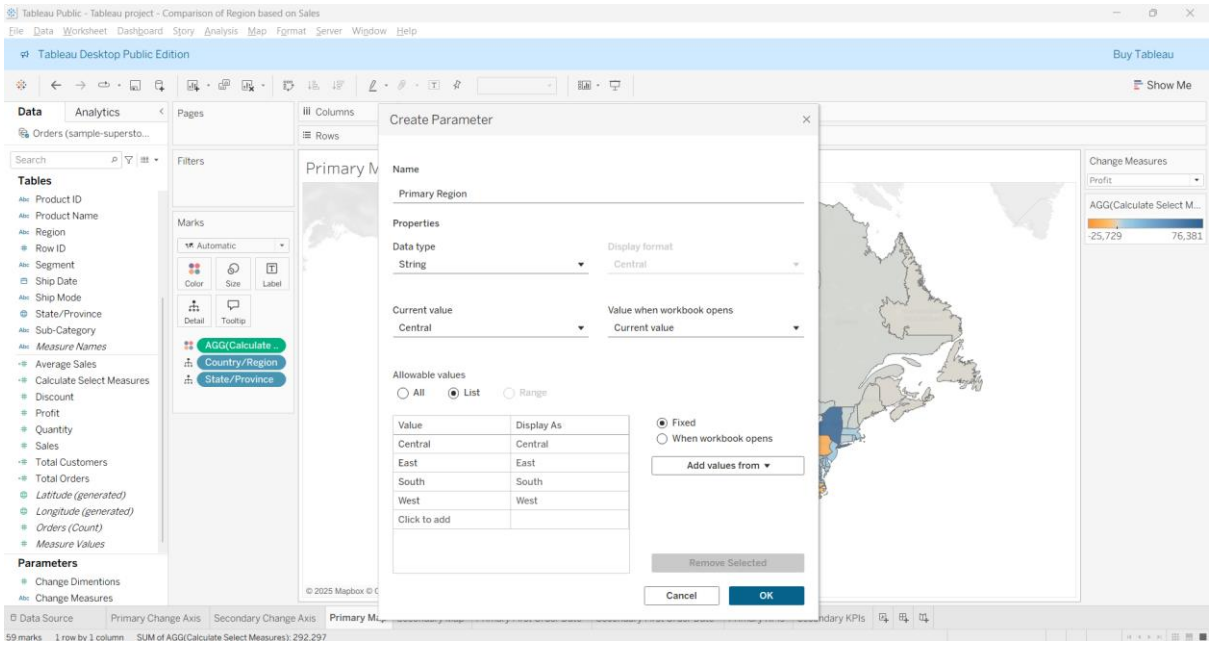


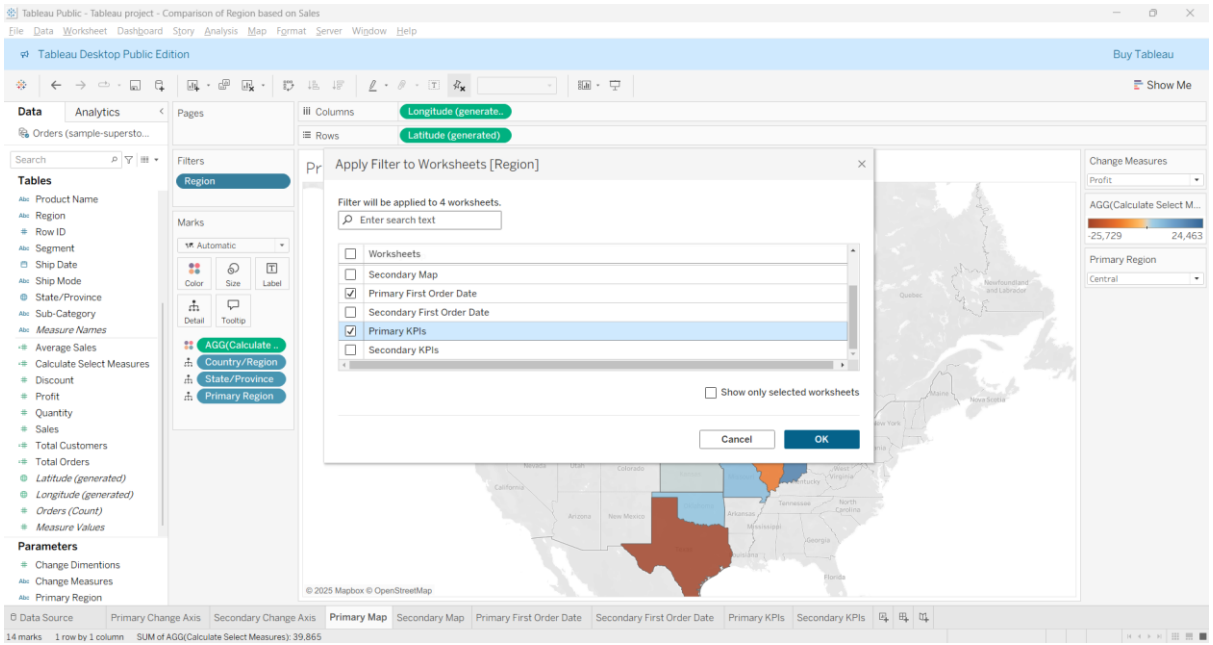
- **First Order Date View** – Timeline of when orders began in each region.



Step 5: Regional Filters (Parameters for Primary & Secondary Regions)

- **Action:** Created Primary and Secondary Region parameters.
- Applied filters across worksheets to dynamically update views.
- **Value:** Enables side-by-side comparison between two selected regions.





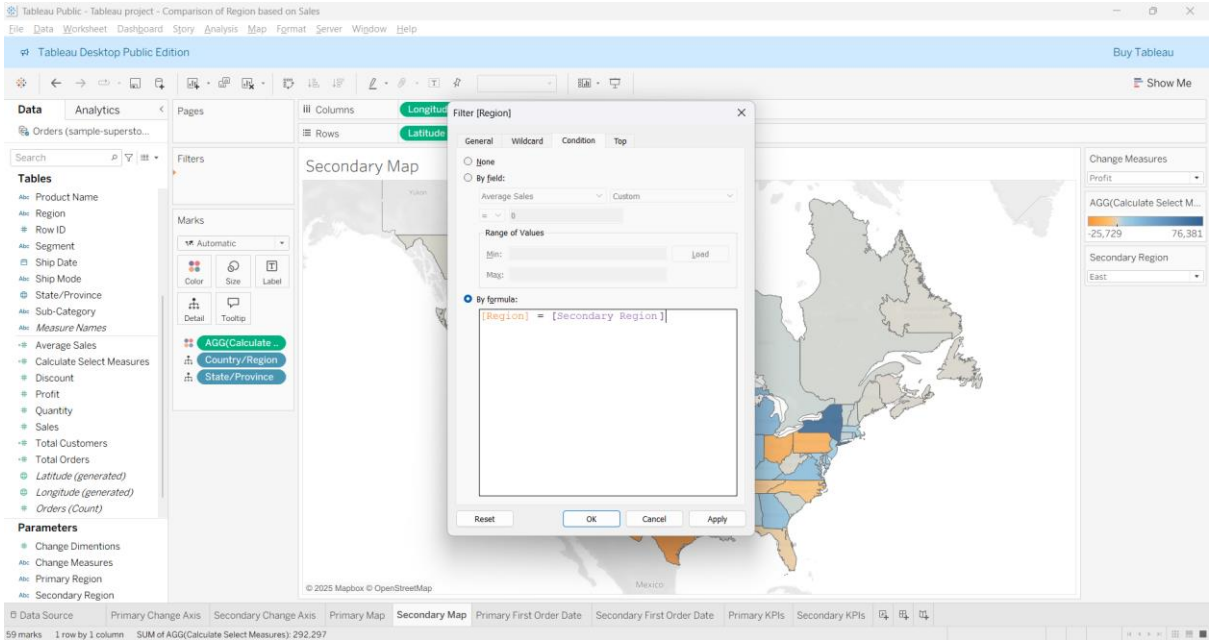


Tableau Public - Tableau project - Comparison of Region based on Sales
Tableau Desktop Public Edition
Buy Tableau
Show Me
Data
Analytics
Pages
Columns
Rows
Filters
Marks
Secondary Map
Filter [Region]
General
Wildcard
Condition
Top
None
By field:
Range of Values
By formula:
[Region] = [Secondary Region]
Reset
OK
Cancel
Apply
Change Measures
Profit
AGG(Calculate Select M...
-25,729
76,381
Secondary Region
East
Tables
Parameters
Change Dimentions
Change Measures
Primary Region
Secondary Region
© 2025 Mapbox © OpenStreetMap
Data Source
Primary Change Axis
Secondary Change Axis
Primary Map
Secondary Map
Primary First Order Date
Secondary First Order Date
Primary KPIs
Secondary KPIs
59 marks
1 row by 1 column
SUM of AGG(Calculate Select Measures): 292,297

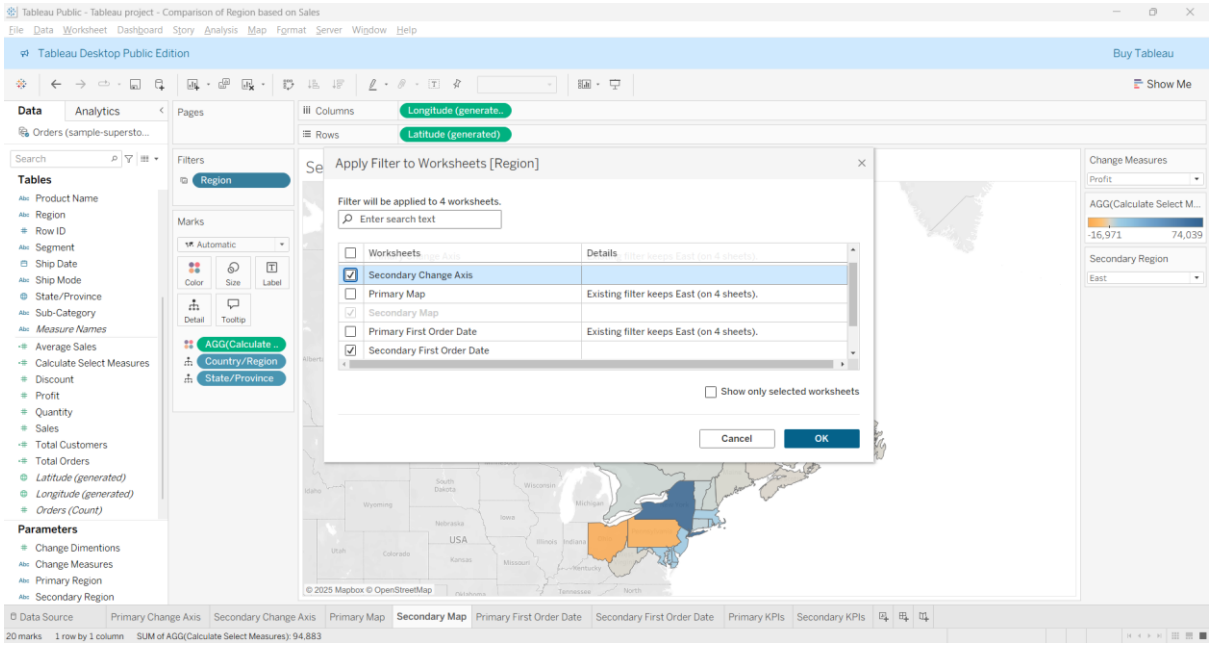
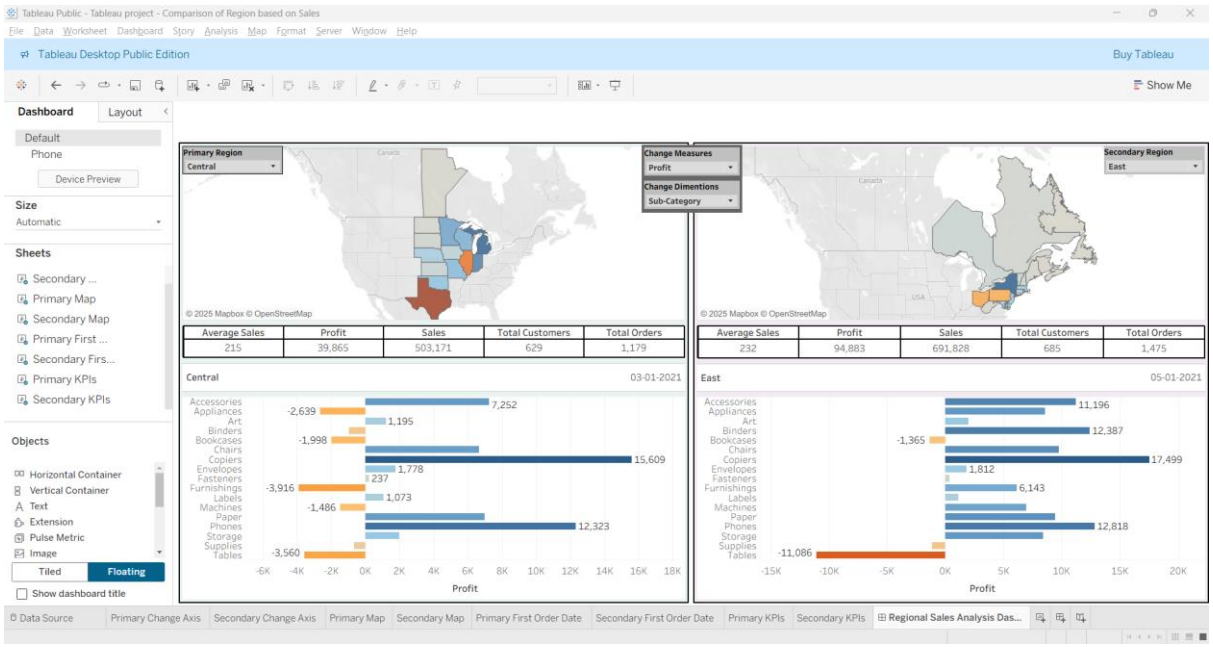
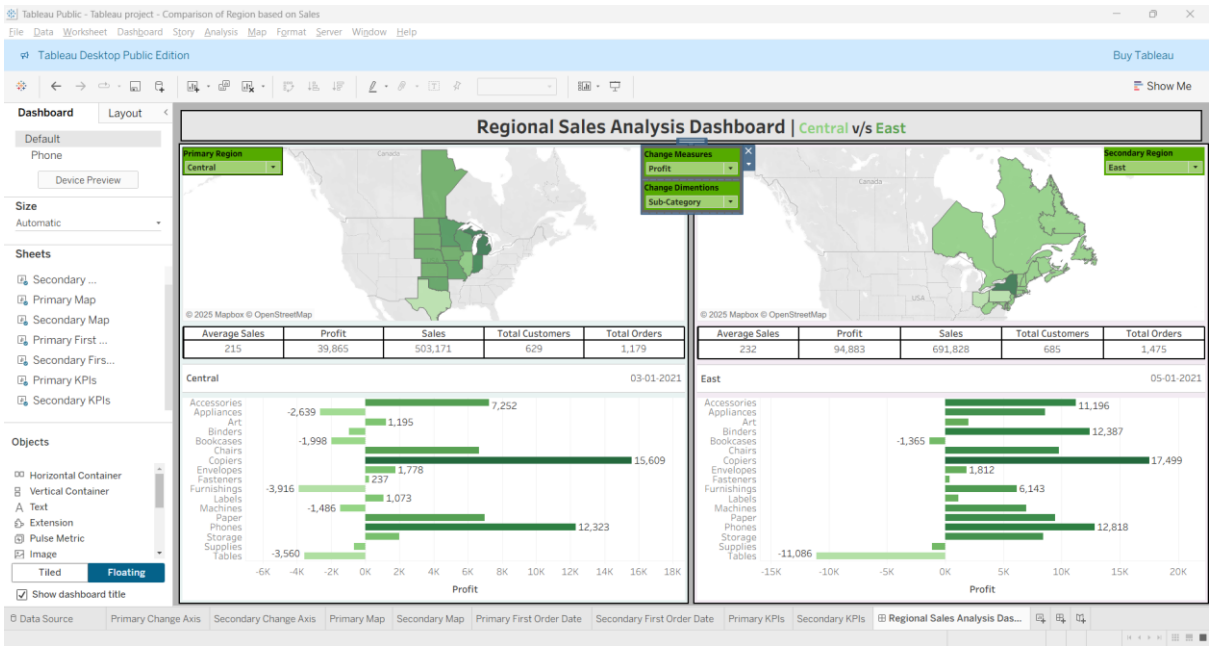


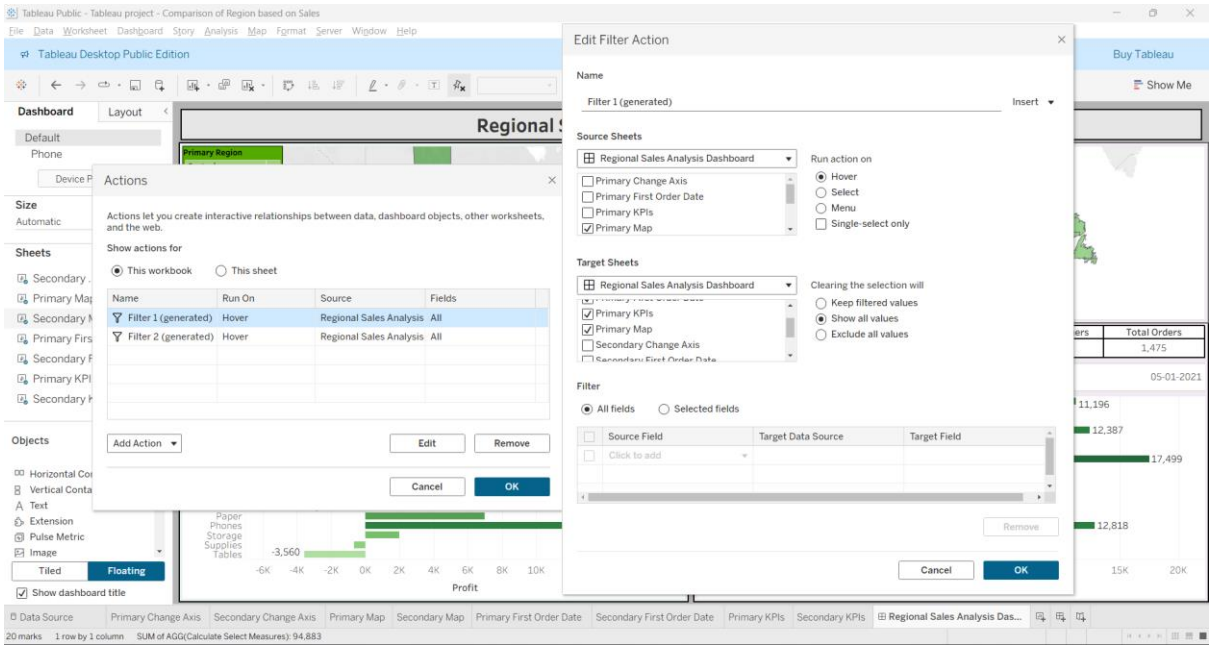
Tableau Public - Tableau project - Comparison of Region based on Sales
Tableau Desktop Public Edition
Buy Tableau
Show Me
Data
Analytics
Pages
Columns
Longitude (generate..
Rows
Latitude (generated)
Filters
Region
Marks
Apply Filter to Worksheets [Region]
Filter will be applied to 4 worksheets.
Enter search text
Worksheets
Details
Secondary Change Axis
Primary Map
Existing filter keeps East (on 4 sheets).
Secondary Map
Primary First Order Date
Existing filter keeps East (on 4 sheets).
Secondary First Order Date
Show only selected worksheets
Cancel
OK
Change Measures
Profit
AGG(Calculate Select M...
-16,971
74,039
Secondary Region
East
Tables
Parameters
Change Dimentions
Change Measures
Primary Region
Secondary Region
© 2025 Mapbox © OpenStreetMap
Data Source
Primary Change Axis
Secondary Change Axis
Primary Map
Secondary Map
Primary First Order Date
Secondary First Order Date
Primary KPIs
Secondary KPIs
20 marks
1 row by 1 column
SUM of AGG(Calculate Select Measures): 94,883

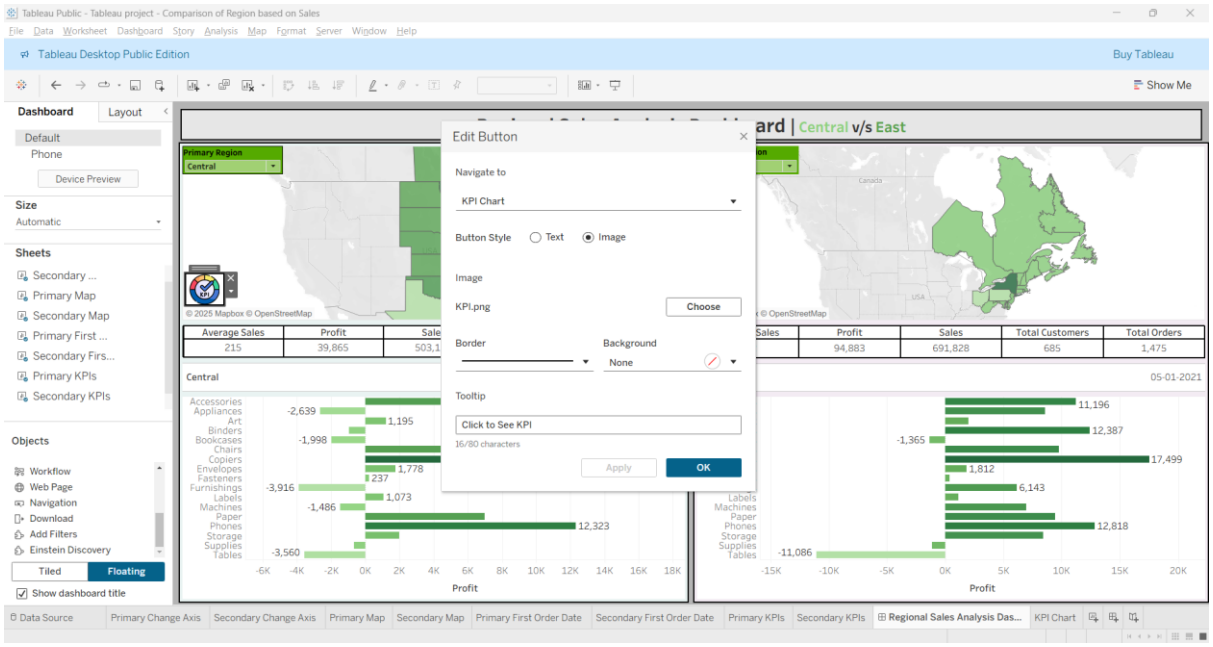
Step 6: Created KPIs and Calculated Fields

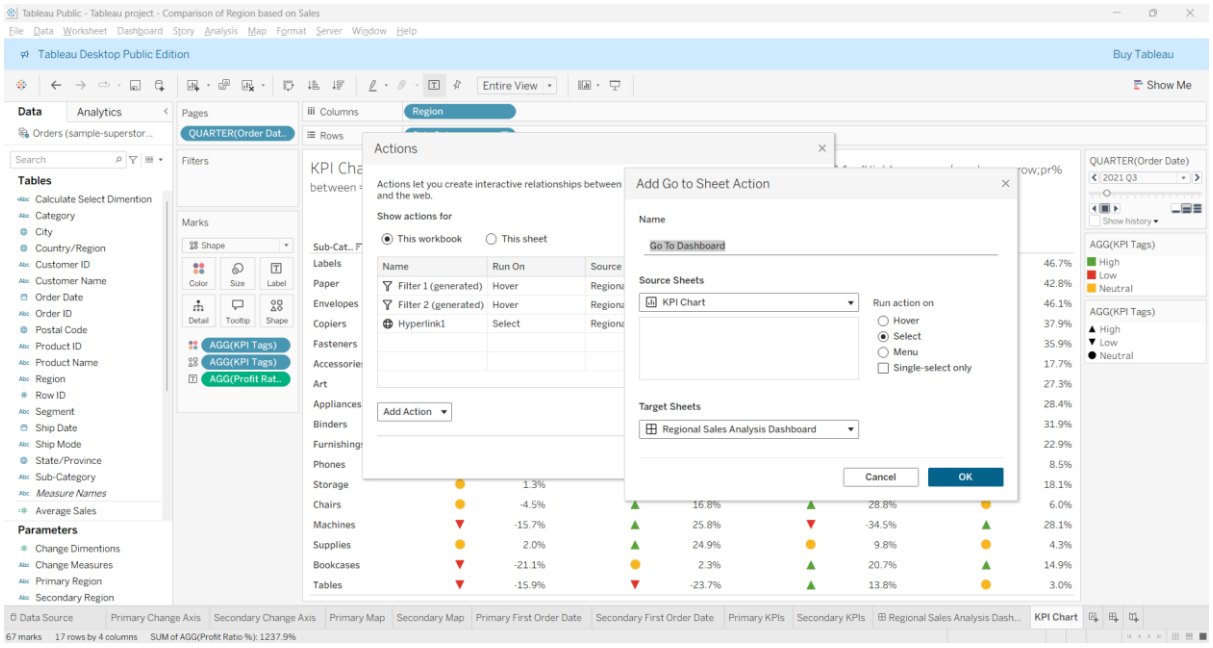
- Created containers for **Primary** and **Secondary** regions.
- Added charts, legends, and formatted titles for clarity.
- Included interactive filters for region, measure, and dimension selection.
- Added **hover filter actions** and **navigation actions** between KPI sheet and dashboard.



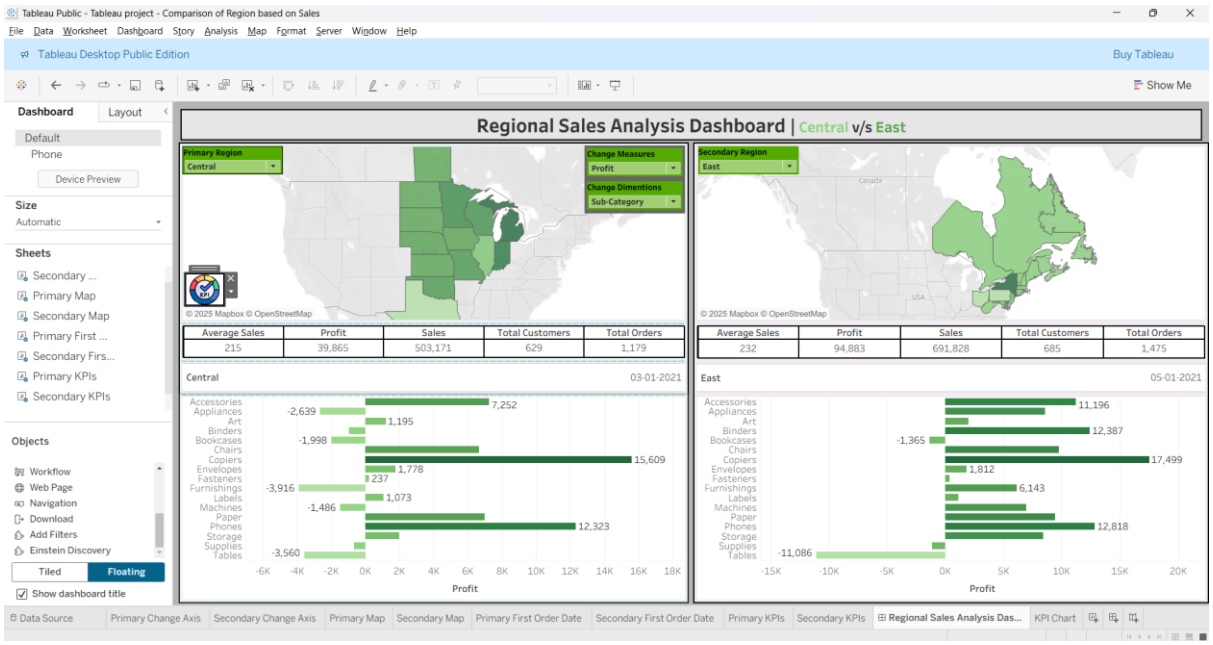


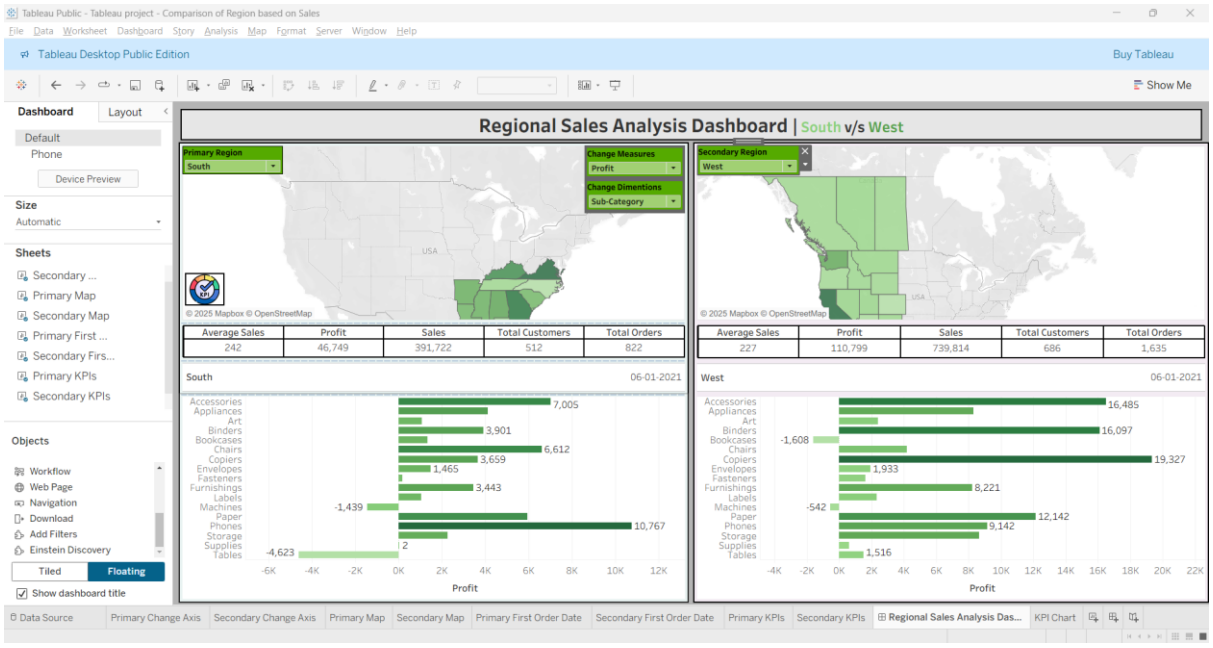

Edit Filter Action
Name
Filter 1 (generated)
Insert
Source Sheets
Regional Sales Analysis Dashboard
Primary Change Axis
Primary First Order Date
Primary KPIs
Primary Map
Run action on
Hover
Select
Menu
Single-select only
Target Sheets
Regional Sales Analysis Dashboard
Primary KPIs
Primary Map
Secondary Change Axis
Clearing the selection will
Keep filtered values
Show all values
Exclude all values
Filter
All fields
Selected fields
Source Field
Target Data Source
Target Field
Click to add
Remove
Cancel
OK
Actions
Actions let you create interactive relationships between data, dashboard objects, other worksheets, and the web.
Show actions for
This workbook
This sheet
Name
Run On
Source
Fields
Filter 1 (generated)
Hover
Regional Sales Analysis
All
Filter 2 (generated)
Hover
Regional Sales Analysis
All
Add Action
Edit
Remove
Cancel
OK
Tableau Desktop Public Edition
Buy Tableau
Show Me
Dashboard
Layout
Default
Phone
Size
Automatic
Sheets
Objects
Tiled
Floating
Show dashboard title
Profit
Total Orders
1,475
05-01-2021
11,196
12,387
17,499
12,818
-3,560


Edit Button
Navigate to
KPI Chart
Button Style
Text
Image
Image
KPI.png
Choose
Border
Background
None
Tooltip
Click to See KPI
16/80 characters
Apply
OK
Central v/s East
Tableau Desktop Public Edition
Buy Tableau
Show Me
Dashboard
Layout
Default
Phone
Device Preview
Size
Automatic
Sheets
Objects
Workflow
Web Page
Navigation
Download
Add Filters
Einstein Discovery
Tiled
Floating
Show dashboard title
Average Sales
Profit
Sales
Total Customers
Total Orders
215
39,865
94,883
691,828
685
1,475
Central
05-01-2021
Profit



- **Final dashboard screenshots here – Central vs East, South vs West**





3. Actionable Insights

Based on the analysis, here are the key findings:

Central vs East

- **Sales & Orders:** Central shows higher overall sales compared to East. However, East demonstrates better efficiency in sales per order (leaning towards higher-value transactions).
- **Customer Base:** Central appears to reach a wider customer base, while East benefits from repeat orders with stronger per-customer value.
- **Product Mix:**

  Central's sales are heavily driven by Furniture.

  East shows strength in Technology products, giving it a more diversified sales mix.
- **Profitability:** Central achieves greater revenue, but East maintains higher profit margins, meaning East is more efficient at converting sales into profit.

South vs West

- **Sales & Orders:** West clearly outperforms South in overall sales. South, however, records a slightly higher average sales per order, reflecting more valuable individual orders.
- **Customer Base:** West attracts a larger customer base, whereas South penetrates deeper into fewer customers, leading to strong per-customer engagement.
- **Product Mix:**

  South is stronger in Office Supplies.

West leads in both Technology and Furniture categories, showing balanced strength across segments.

- **Profitability:** Despite South's lower total revenue, its profit ratio is competitive with West, suggesting higher efficiency per sale.

4. Conclusion

The Tableau dashboard successfully compares regional sales performance through dynamic parameters, KPIs, maps, and interactive charts. It allows management to:

- Identify top-performing regions.
- Recognize improvement areas.
- Align sales strategies to boost efficiency and profitability.