

Key Objectives:

I want to understand how our sales are performing to identify growth opportunities and areas needing attention.

Key Metrics:

Overall Sales Performance:

1. **Total Sales Revenue** - How much revenue are we generating?
 2. **Units Sold** - The total number of items sold.
 3. **Year-over-Year Growth** - Percentage change in revenue compared to the previous year.
 4. **Monthly Revenue Trend** - Revenue trends across months to identify seasonality.
 5. **Gross Margin** - Revenue minus cost of goods sold (COGS).
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Regional Performance:

1. **Sales by Region** - Breakdown of revenue by geographic area.
 2. **Top 3 and Bottom 3 Regions** - Highlighting the best and worst-performing regions.
 3. **Market Share by Region** - Percentage of total sales by each region.
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Product Performance:

1. **Top-Selling Products** - Products generating the highest revenue.
 2. **Low-Selling Products** - Products contributing the least to revenue.
 3. **Sales by Product Category** - Revenue distribution by product categories.
 4. **Product Profitability** - Gross margin per product.
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Customer Insights:

1. **Top Customers** - Customers contributing the most revenue.
 2. **New vs. Returning Customers** - Ratio of first-time customers to repeat buyers.
 3. **Average Order Value (AOV)** - Revenue per order.
 4. **Customer Lifetime Value (CLV)** - Estimated total revenue from a customer over their lifetime.
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Sales Team Performance:

1. **Sales by Representative** - Individual performance metrics for each salesperson.
 2. **Quota Achievement Rate** - Percentage of quota achieved by the team.
 3. **Revenue per Sales Rep** - Revenue attributed to each sales representative.
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Key Insights Needed:

1. **Revenue Drivers:**

What's driving sales (specific regions, products, or customer segments)?

Which factors are causing lower performance?

2. **Seasonality Trends:**

Are there predictable peaks and troughs in revenue during the year?

3. **Profitability Focus:**

Which products/regions are the most and least profitable?

4. **Customer Trends:**

How can we increase loyalty and repeat purchases?

Additional Requirements:

Filters: Ability to filter by time (month, quarter, year), product category, region, and sales rep.

Alerts: Visual indicators for underperforming regions or products.

Interactivity: Drill-through capabilities to analyze specific regions, products, or customers in detail.