

Dashboard 1. Unicorn Overview

Here we will review the results of the data analysis and recommendations for the further growth of Unicorn Company.

Positive growth trends over the past 4 years, with both sales and profits increasing year by year.

The average annual profitability is 12.6%, which is a good indicator for both wholesale and retail sales in the US.

The graph reveals a seasonal pattern, with sales volumes rising toward the end of the year and declining at the beginning. However, in the last two years, despite the increase in sales volume in November, there is a decrease in profit during this period, which could be linked to the start of the discount season in the US.

On the dashboard, you can select a year to display KPIs, as well as a year for comparing sales volume and profit with the previous period.

Dashboard 2. Sales Geography

The sales and profit geography is presented on the second dashboard. Sales are shown in numbers, while states with negative profitability are highlighted in red. Unicorn faces profitability issues in 10 states, with Texas experiencing the highest losses despite high sales.

On the geography dashboard, you can also select one or multiple years to display the data.

I analyzed the factors causing losses and identified two main ones: customers and discount policies. On the next dashboard, we will analyze the company's discount policy and its impact on revenue.

Dashboard 3. Discount Policy Analysis

18% of our orders were sold with discounts greater than 20%, resulting in losses of approximately 140K (133,973) over four years. Out of 17 product subcategories, only two are profitable when offering discounts greater than 20%. I would recommend revisiting the discount policy and completely eliminating discounts exceeding 20%, as such sales are unprofitable.

Subcategories such as Tables, Supplies, and Storage result in losses regardless of the discount percentage. I recommend completely discontinuing any discounts for these subcategories or re-evaluating the pricing strategy.

In adjusting the discount policy, I see an opportunity to increase profit growth. Additionally, we can achieve profitability in previously unprofitable states.

You can select categories and years to display on the dashboard.

Dashboard 4. Client Analysis

The second opportunity for company growth was identified through the analysis of the company's customer base.

Despite the fact that the number of active loyal customers is significant and shows positive growth, the number of new customers is steadily declining, which I see as an opportunity for the company's growth.

My recommendation is to launch a promotional campaign similar to the one conducted during the company's first year of operation, as it demonstrated high effectiveness.

Dashboard 5. Profit Forecast Compared with 2018

For a clear demonstration of growth resulting from my recommendations, I calculated a sales forecast based on the 2018 price and sales volume data, considering the increase in the number of new customers and changes in the discount policy. With an increase of 100 customers, the annual profit will grow by more than 13 K (13412). If discounts above 20% were canceled, the additional profit would be more than 240 K(240,932).

You can adjust the number of new customers and the maximum discount percentage using the parameters in the center of the dashboard.

Dashboard 6. Profit Forecast for Unprofitable States

Another important point I would like to draw your attention to is the profit forecast for unprofitable states, presented on the last dashboard. This forecast is also based on 2018 sales data, including prices and volumes. It allows us to assess the growth dynamics, and under the current discount policy, an additional number of customers leads to further losses. Therefore, the recommendation for unprofitable states is primarily to revise the discount policy, and only then focus on increasing the customer base.

As with the previous dashboard, you can set the number of new customers and the maximum discount percentage using the parameters, and you can also change the state for analysis through the filter.