

Mini Project Summary: Sales & Customer Performance Dashboard

Overview

This project focuses on building two dynamic Tableau dashboards designed to help stakeholders—such as sales managers, executives, and marketing teams—analyze sales performance and understand customer behavior. The dashboards offer a comprehensive view of KPIs, trends, and segment-level insights with full interactivity.

1. Sales Dashboard Summary

Purpose:

To present an overview of sales metrics and trends, enabling year-over-year analysis and identification of key performance patterns.

Key Features:

- KPI Overview: Displays total sales, profit, and quantity for both the current and previous year.
- Sales Trends: Shows monthly performance for each KPI with clear identification of peak and low-performing months.
- Product Subcategory Comparison: Compares sales and profit across product subcategories for both years.
- Weekly Trends for Sales & Profit: Includes weekly metrics, average weekly values, and highlights above/below-average weeks.

2. Customer Dashboard Summary

Purpose:

To provide insights into customer behavior, distribution, and performance, supporting improved customer engagement and satisfaction strategies.

Key Features:

- KPI Overview: Displays total customers, sales per customer, and order counts for the current and previous year.
- Customer Trends: Monthly trends with emphasis on highest and lowest sales months.
- Customer Distribution by Orders: Visualizes customer engagement levels based on number of orders.
- Top 10 Customers by Profit: Highlights high-value customers with details such as rank, order count, sales, profit, and last order date.

3. Design & Interactivity

- Dynamic Year Selection: Users can explore historical data by choosing any year.
- Dashboard Navigation: Smooth transition between sales and customer dashboards.
- Interactive Elements: Clickable charts and filters for product categories, subcategories, region, state, and city.

This project aims to deliver executive-ready dashboards with actionable insights to support data-driven decisions.