

SALES PERFORMANCE ANALYSIS & DASHBOARD IN EXCEL



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BACKGROUND

Sales data is one of the most important assets for understanding business performance and customer behavior. However, raw sales data often comes in large and unstructured formats, making it difficult to extract meaningful insights. This project focuses on transforming sales data into an interactive and easy-to-understand dashboard using Microsoft Excel. By applying data analysis and visualization techniques, this dashboard is expected to help monitor key sales metrics, identify trends, and support data-driven decision making.

PROJECT OVERVIEW

1. Objectives

- Transform sales data into an interactive dashboard to monitor key sales performance metrics.
- Identify sales trends and patterns across different time periods and business segments.
- Support data-driven decision making through clear and insightful data visualization.

2. Tool

Microsoft Excel

Used for data analysis and dashboard creation, utilizing Pivot Tables, charts, and interactive features such as slicers.

DATASET OVERVIEW

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | |
|----|--------------|------------|------------|----------------|-------------|-----------------|-------------|---------------|-----------------|----------------|-------------|---------|--------------|-----------------|--------------|-----------------|----------|----------|----------|------------|--------------|-------|------|
| 1 | Order ID | Order Date | Ship Date | Ship Mode | Customer ID | Customer Name | Segment | Country | City | State | Postal Code | Region | Product ID | Category | Sub-Category | Product Name | Sales | Quantity | Discount | Profit | Calendar | Month | Year |
| 2 | CA-2016-1521 | 11/8/2016 | 11/11/2016 | Second Class | CG-12520 | Claire Gute | Consumer | United States | Henderson | Kentucky | 42420 | South | FUR-BO-1000 | Furniture | Bookcases | Bush Somerset | 261.96 | 2 | 0 | 41.9136 | 8 November | 2016 | |
| 3 | CA-2016-1521 | 11/8/2016 | 11/11/2016 | Second Class | CG-12520 | Claire Gute | Consumer | United States | Henderson | Kentucky | 42420 | South | FUR-CH-1000 | Furniture | Chairs | Hon Deluxe Fa | 731.94 | 3 | 0 | 219.582 | 8 November | 2016 | |
| 4 | CA-2016-1386 | 6/12/2016 | 6/16/2016 | Second Class | DV-13045 | Darrin Van Huf | Corporate | United States | Los Angeles | California | 90036 | West | OFF-LA-10000 | Office Supplies | Labels | Self-Adhesive | 14.62 | 2 | 0 | 6.8714 | 12 June | 2016 | |
| 5 | US-2015-1089 | 10/11/2015 | 10/18/2015 | Standard Class | SO-20335 | Sean O'Donne | Consumer | United States | Fort Lauderdale | Florida | 33311 | South | FUR-TA-10000 | Furniture | Tables | Bretford CR45 | 957.5775 | 5 | 0.45 | -383.031 | 11 October | 2015 | |
| 6 | US-2015-1089 | 10/11/2015 | 10/18/2015 | Standard Class | SO-20335 | Sean O'Donne | Consumer | United States | Fort Lauderdale | Florida | 33311 | South | OFF-ST-10000 | Office Supplies | Storage | Eldon Fold 'N F | 22.368 | 2 | 0.2 | 2.5164 | 11 October | 2015 | |
| 7 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | FUR-FU-1000 | Furniture | Furnishings | Eldon Express | 48.86 | 7 | 0 | 14.1694 | 9 June | 2014 | |
| 8 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | OFF-AR-10000 | Office Supplies | Art | Newell 322 | 7.28 | 4 | 0 | 1.9656 | 9 June | 2014 | |
| 9 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | TEC-PH-1000 | Technology | Phones | Mitel 5320 IP P | 907.152 | 6 | 0.2 | 90.7152 | 9 June | 2014 | |
| 10 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | OFF-BI-10003 | Office Supplies | Binders | DXL Angle-Vie | 18.504 | 3 | 0.2 | 5.7825 | 9 June | 2014 | |
| 11 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | OFF-AP-10002 | Office Supplies | Appliances | Belkin F5C206 | 114.9 | 5 | 0 | 34.47 | 9 June | 2014 | |
| 12 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | FUR-TA-10001 | Furniture | Tables | Chromcraft Re | 1706.184 | 9 | 0.2 | 85.3092 | 9 June | 2014 | |
| 13 | CA-2014-1158 | 6/9/2014 | 6/14/2014 | Standard Class | BH-11710 | Brosina Hoffm | Consumer | United States | Los Angeles | California | 90032 | West | TEC-PH-1000 | Technology | Phones | Konftel 250 Co | 911.424 | 4 | 0.2 | 68.3568 | 9 June | 2014 | |
| 14 | CA-2017-1144 | 4/15/2017 | 4/20/2017 | Standard Class | AA-10480 | Andrew Allen | Consumer | United States | Concord | North Carolina | 28027 | South | OFF-PA-10002 | Office Supplies | Paper | Xerox 1967 | 15.552 | 3 | 0.2 | 5.4432 | 15 April | 2017 | |
| 15 | CA-2016-1613 | 12/5/2016 | 12/10/2016 | Standard Class | IM-15070 | Irene Maddox | Consumer | United States | Seattle | Washington | 98103 | West | OFF-BI-10003 | Office Supplies | Binders | Fellowes PB20 | 407.976 | 3 | 0.2 | 132.5922 | 5 December | 2016 | |
| 16 | US-2015-1189 | 11/22/2015 | 11/26/2015 | Standard Class | HP-14815 | Harold Pawlan | Home Office | United States | Fort Worth | Texas | 76106 | Central | OFF-AP-10002 | Office Supplies | Appliances | Holmes Repla | 68.81 | 5 | 0.8 | -123.858 | 22 November | 2015 | |
| 17 | US-2015-1189 | 11/22/2015 | 11/26/2015 | Standard Class | HP-14815 | Harold Pawlan | Home Office | United States | Fort Worth | Texas | 76106 | Central | OFF-BI-10000 | Office Supplies | Binders | Storex DuraTe | 2.544 | 3 | 0.8 | -3.816 | 22 November | 2015 | |
| 18 | CA-2014-1058 | 11/11/2014 | 11/18/2014 | Standard Class | PK-19075 | Pete Kriz | Consumer | United States | Madison | Wisconsin | 53711 | Central | OFF-ST-10004 | Office Supplies | Storage | Stur-D-Stor Sh | 665.88 | 6 | 0 | 13.3176 | 11 November | 2014 | |
| 19 | CA-2014-1671 | 5/13/2014 | 5/15/2014 | Second Class | AG-10270 | Alejandro Grov | Consumer | United States | West Jordan | Utah | 84084 | West | OFF-ST-10000 | Office Supplies | Storage | Fellowes Supe | 55.5 | 2 | 0 | 9.99 | 13 May | 2014 | |
| 20 | CA-2014-1433 | 8/27/2014 | 9/1/2014 | Second Class | ZD-21925 | Zuschuss Don | Consumer | United States | San Francisco | California | 94109 | West | OFF-AR-10003 | Office Supplies | Art | Newell 341 | 8.56 | 2 | 0 | 2.4824 | 27 August | 2014 | |
| 21 | CA-2014-1433 | 8/27/2014 | 9/1/2014 | Second Class | ZD-21925 | Zuschuss Don | Consumer | United States | San Francisco | California | 94109 | West | TEC-PH-1000 | Technology | Phones | Cisco SPA 501 | 213.48 | 3 | 0.2 | 16.011 | 27 August | 2014 | |
| 22 | CA-2014-1433 | 8/27/2014 | 9/1/2014 | Second Class | ZD-21925 | Zuschuss Don | Consumer | United States | San Francisco | California | 94109 | West | OFF-BI-10002 | Office Supplies | Binders | Wilson Jones I | 22.72 | 4 | 0.2 | 7.384 | 27 August | 2014 | |
| 23 | CA-2016-1373 | 12/9/2016 | 12/13/2016 | Standard Class | KB-16585 | Ken Black | Corporate | United States | Fremont | Nebraska | 68025 | Central | OFF-AR-10000 | Office Supplies | Art | Newell 318 | 19.46 | 7 | 0 | 5.0596 | 9 December | 2016 | |
| 24 | CA-2016-1373 | 12/9/2016 | 12/13/2016 | Standard Class | KB-16585 | Ken Black | Corporate | United States | Fremont | Nebraska | 68025 | Central | OFF-AP-10001 | Office Supplies | Appliances | Acco Six-Outlet | 60.34 | 7 | 0 | 15.6884 | 9 December | 2016 | |
| 25 | US-2017-1569 | 7/16/2017 | 7/18/2017 | Second Class | SF-20065 | Sandra Flanagan | Consumer | United States | Philadelphia | Pennsylvania | 19140 | East | FUR-CH-1000 | Furniture | Chairs | Global Deluxe | 71.372 | 2 | 0.3 | -1.0196 | 16 July | 2017 | |
| 26 | CA-2015-1063 | 9/25/2015 | 9/30/2015 | Standard Class | EB-13870 | Emily Burns | Consumer | United States | Orem | Utah | 84057 | West | FUR-TA-10000 | Furniture | Tables | Bretford CR45 | 1044.63 | 3 | 0 | 240.2649 | 25 September | 2015 | |
| 27 | CA-2016-1217 | 1/16/2016 | 1/20/2016 | Second Class | EH-13945 | Eric Hoffmann | Consumer | United States | Los Angeles | California | 90049 | West | OFF-BI-10001 | Office Supplies | Binders | Wilson Jones | 11.648 | 2 | 0.2 | 4.2224 | 16 January | 2016 | |
| 28 | CA-2016-1217 | 1/16/2016 | 1/20/2016 | Second Class | EH-13945 | Eric Hoffmann | Consumer | United States | Los Angeles | California | 90049 | West | TEC-AC-1000 | Technology | Accessories | Imation 8GB M | 90.57 | 3 | 0 | 11.7741 | 16 January | 2016 | |
| 29 | US-2015-1506 | 9/17/2015 | 9/21/2015 | Standard Class | TB-21520 | Tracy Blumstei | Consumer | United States | Philadelphia | Pennsylvania | 19140 | East | FUR-BO-1000 | Furniture | Bookcases | Riverside Pala | 3083.43 | 7 | 0.5 | -1665.0522 | 17 September | 2015 | |
| 30 | US-2015-1506 | 9/17/2015 | 9/21/2015 | Standard Class | TB-21520 | Tracy Blumstei | Consumer | United States | Philadelphia | Pennsylvania | 19140 | East | OFF-BI-10000 | Office Supplies | Binders | Avery Recycled | 9.618 | 2 | 0.7 | -7.0532 | 17 September | 2015 | |
| 31 | US-2015-1506 | 9/17/2015 | 9/21/2015 | Standard Class | TB-21520 | Tracy Blumstei | Consumer | United States | Philadelphia | Pennsylvania | 19140 | East | FUR-FU-1000 | Furniture | Furnishings | Howard Miller | 124.2 | 3 | 0.2 | 15.525 | 17 September | 2015 | |

DATASET DESCRIPTION

1. Dataset

Sales Performance Dataset

2. Dataset Size

Rows : 9994

Columns : 23

3. Goal

To analyze sales data and present key performance insights through an interactive dashboard using Microsoft Excel.

INTERACTIVE FILTERS (SLICERS)

Month (All)

Year

2014 2015
2016 2017

Segment

Consumer Corporate Home Of...

Region

Central East
South West

Calendar

1 2 3 4 5
6 7 8 9 10
11 12 13 14 15
16 17 18 19 20
21 22 23 24 25
26 27 28 29 30
31

State

Alabama Arizona Arkansas
California Colorado Connect...
Delaware District ... Florida
Georgia Idaho Illinois
Indiana Iowa Kansas
Kentucky Louisiana Maine

- Allows users to dynamically filter sales data by year, segment, region, date, and state.
- Enables flexible exploration of sales performance without modifying the underlying data.
- Enhances dashboard usability by providing real-time insights based on selected criteria.

SALES KPIS SUMMARY

| Values | |
|----------------------|-------------|
| Sum of Sales | \$2,297,201 |
| Sum of Profit | \$286,397 |
| Sum of Quantity | 37,873 |
| Sum of Profit Margin | 12.47% |



Total Sales
\$2,297,201



Total Profit
\$286,397



Quantity
37,873



Profit Margin
12.47%

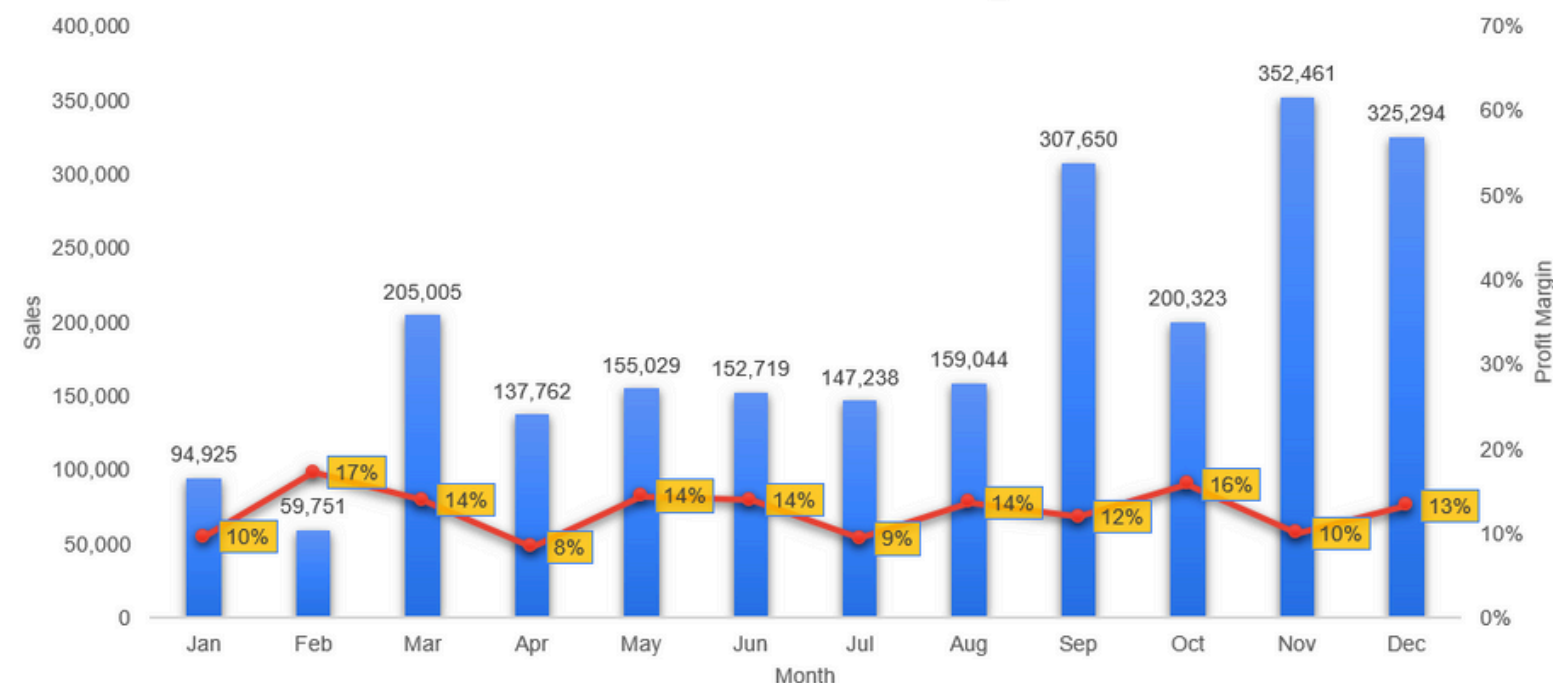
Key Performance Indicators (KPIs):

- **Total Sales** – Total revenue generated from all sales transactions.
- **Total Profit** – Total profit earned after costs.
- **Quantity Sold** – Total number of products sold.
- **Profit Margin** – Percentage of profit relative to total sales.

TIME TREND ANALYSIS

| Row Labels | Sum of Sales | Sum of Profit Margin |
|-------------|--------------|----------------------|
| Jan | 94,925 | 10% |
| Feb | 59,751 | 17% |
| Mar | 205,005 | 14% |
| Apr | 137,762 | 8% |
| May | 155,029 | 14% |
| Jun | 152,719 | 14% |
| Jul | 147,238 | 9% |
| Aug | 159,044 | 14% |
| Sep | 307,650 | 12% |
| Oct | 200,323 | 16% |
| Nov | 352,461 | 10% |
| Dec | 325,294 | 13% |
| Grand Total | 2297200.86 | 0.124672172 |

Trend of Sales Profit Margin

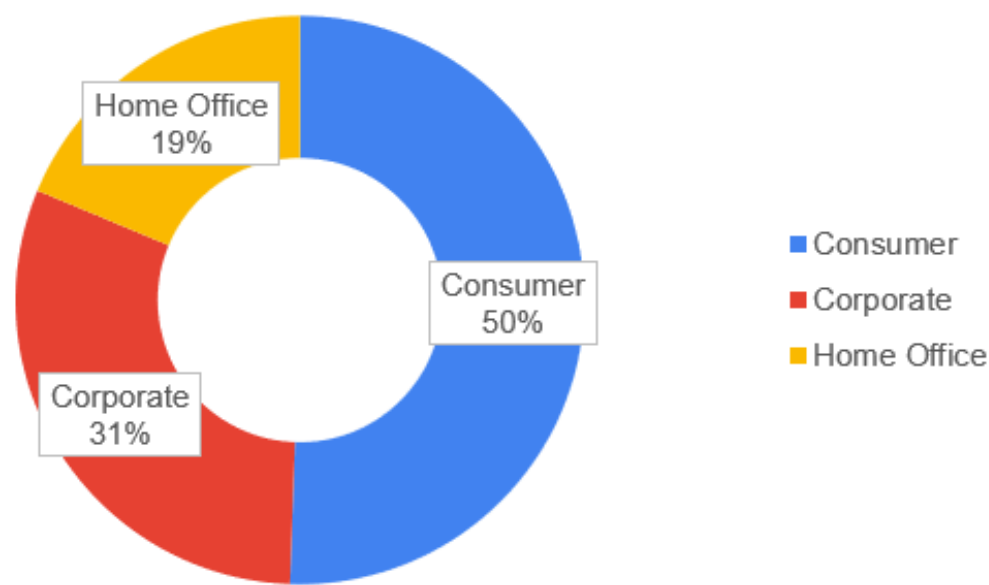


- Sales exhibited a fluctuating trend throughout the year, with the highest peaks occurring in November and December.
- Profit margins remained relatively stable, ranging between 8% and 17%, with the highest margins recorded in February and October.
- Increases in sales did not always correspond to higher margins, indicating variations in pricing strategies or cost structures during certain periods.

SEGMENT ANALYSIS

| Row Labels | Sum of Sales |
|-------------|--------------|
| Consumer | 1161401.345 |
| Corporate | 706146.3668 |
| Home Office | 429653.1485 |
| Grand Total | 2297200.86 |

Sales in Each Segment

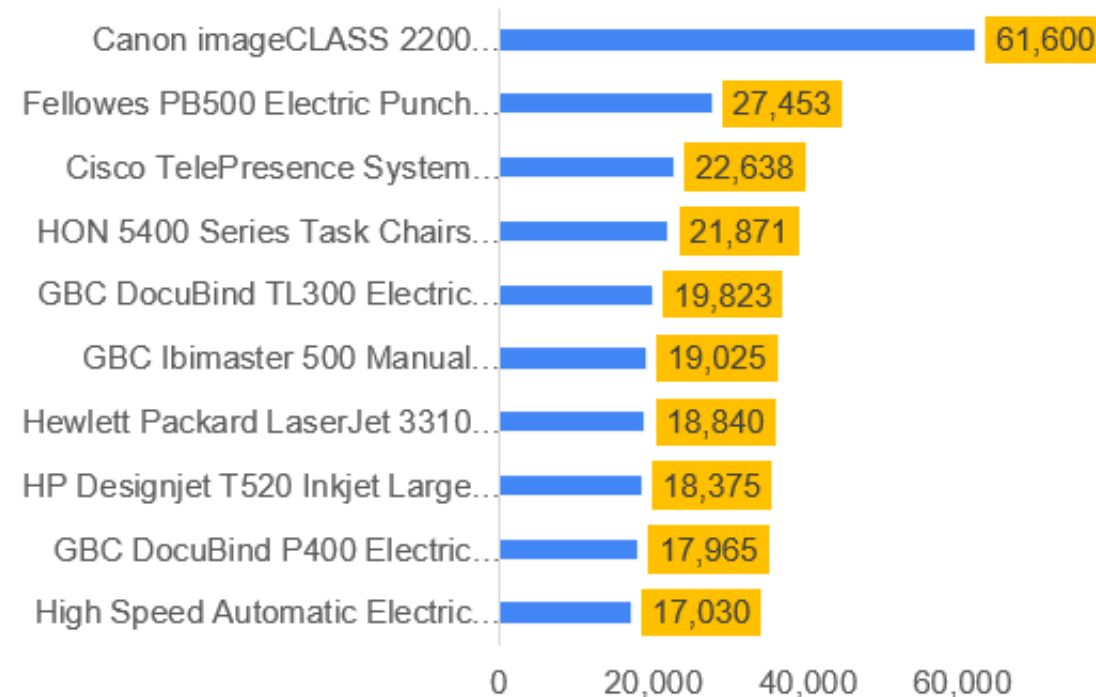


- The Consumer segment contributes the largest share of total sales, making it the primary revenue driver.
- The Corporate segment shows strong performance as the second-highest contributor.
- Home Office generates the lowest sales, indicating a smaller but potential growth segment.

PRODUCT PERFORMANCE ANALYSIS

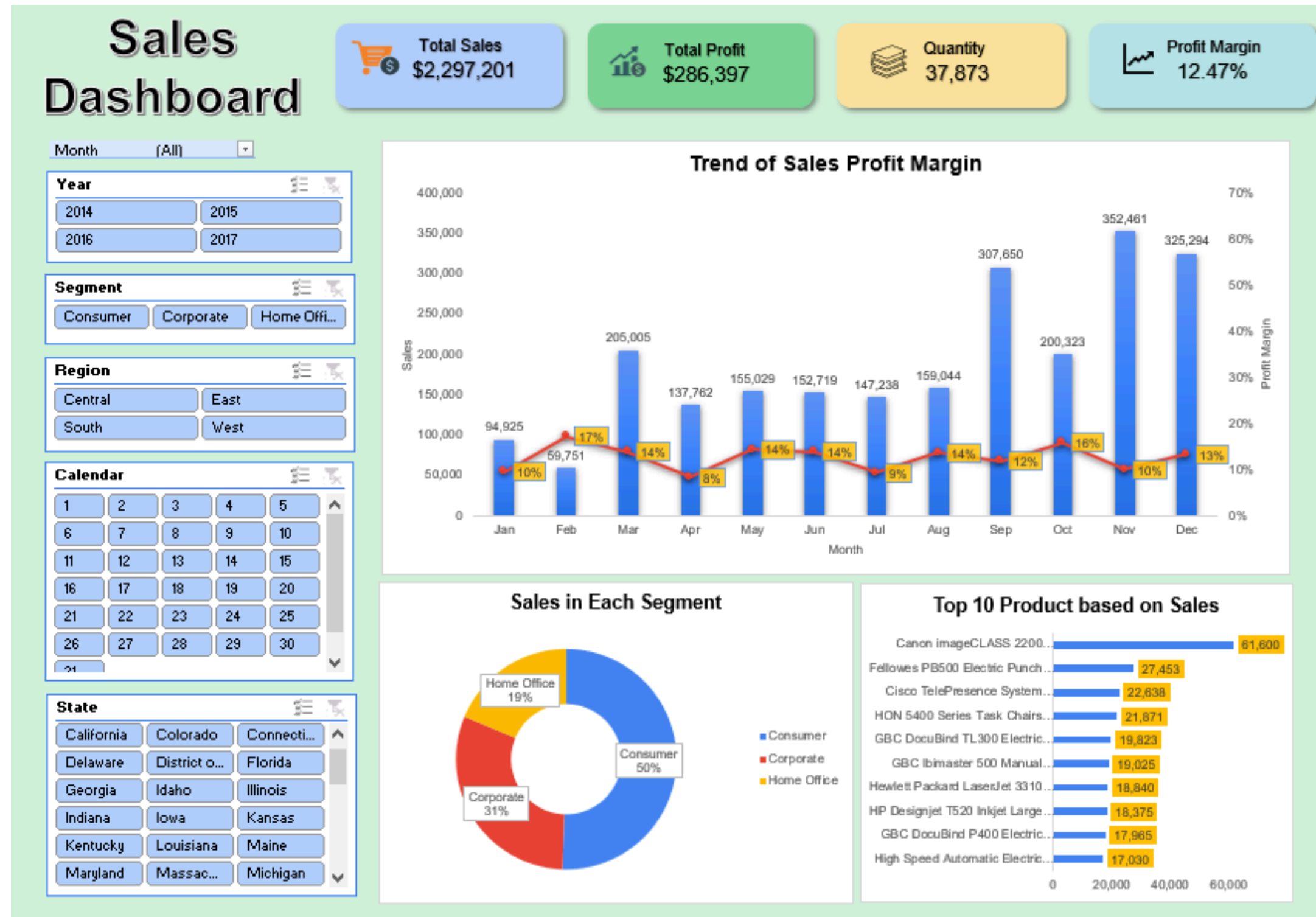
| Row Labels | Sum of Sales |
|------------------------------|-------------------|
| High Speed Automatic Elect | 17,030 |
| GBC DocuBind P400 Electric | 17,965 |
| HP Designjet T520 Inkjet Lar | 18,375 |
| Hewlett Packard LaserJet 33 | 18,840 |
| GBC Ibimaster 500 Manual F | 19,025 |
| GBC DocuBind TL300 Electr | 19,823 |
| HON 5400 Series Task Chai | 21,871 |
| Cisco TelePresence System | 22,638 |
| Fellowes PB500 Electric Pur | 27,453 |
| Canon imageCLASS 2200 A | 61,600 |
| Grand Total | 244620.204 |

Top 10 Product based on Sales



- Canon imageCLASS leads as the top-selling product, contributing the highest sales among all products.
- The remaining top products show a relatively even distribution of sales, indicating no extreme dominance beyond the top product.
- This suggests that while a few products drive high revenue, overall sales performance is supported by a diversified product portfolio.

DASHBOARD



CONCLUSIONS

- The Consumer segment is the main contributor to total sales, while Corporate also shows strong performance.
- Sales peak toward the end of the year, indicating seasonal trends in customer purchasing behavior.
- Profit margin remains relatively stable, suggesting consistent pricing and cost management across periods.

SUGGESTIONS

- Focus marketing and promotional efforts on high-performing segments, particularly the Consumer segment.
- Optimize sales strategies during peak months to maximize revenue and profitability.
- Explore growth opportunities in the Home Office segment through targeted campaigns or product bundling.

LET'S CONNECT



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THANK YOU