

# **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 Somers	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 Clas	SO-20335	Sean O'Donne	Consumer	United States	Fort Lauderdale	Florida	33311	South	FUR-TA-10000	Furniture	Tables	Bretford CR450	957.5775	5	0.45	-383.031	11 October	2015		
6	US-2015-1089	10/11/2015	10/18/2015	Standard Clas	SO-20335	Sean O'Donne	Consumer	United States	Fort Lauderdale	Florida	33311	South	OFF-ST-10000	Office Supplies	Storage	Eldon Fold 'N Fit	22.368	2	0.2	2.5164	11 October	2015		
7	CA-2014-1158	6/9/2014	6/14/2014	Standard Clas	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 Clas	BH-11710	Brosina Hoffm	Consumer	United States	Los Angeles	California	90032	West	OFF-AR-10002	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 Clas	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 Clas	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 Clas	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 Clas	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 Clas	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 Clas	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 Clas	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 Clas	HP-14815	Harold Pawlani	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 Clas	HP-14815	Harold Pawlani	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 Clas	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	16.0111	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 Clas	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 Clas	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 Clas	EB-13870	Emily Burns	Consumer	United States	Orem	Utah	84057	West	FUR-TA-10000	Furniture	Tables	Bretford CR450	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 I	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-10003	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 Clas	TB-21520	Tracy Blumstein	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 Clas	TB-21520	Tracy Blumstein	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 Clas	TB-21520	Tracy Blumstein	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**

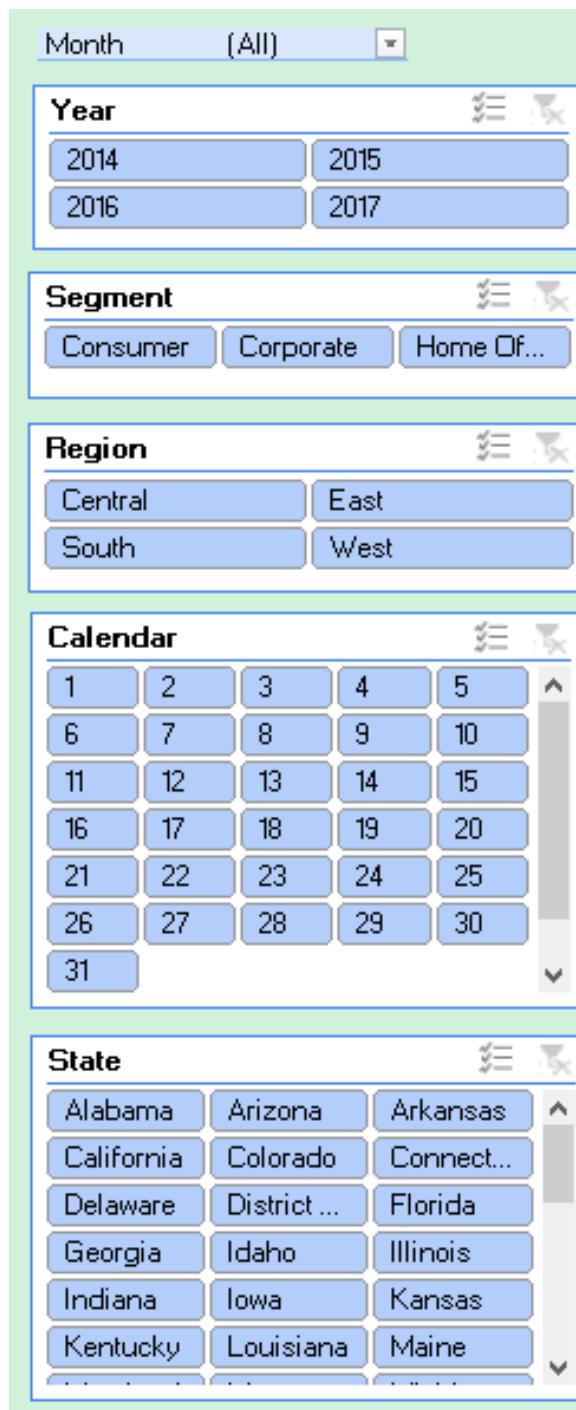
Rows : 9994

Columns : 23

## **3. Goal**

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

# INTERACTIVE FILTERS (SLICERS)



- 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%

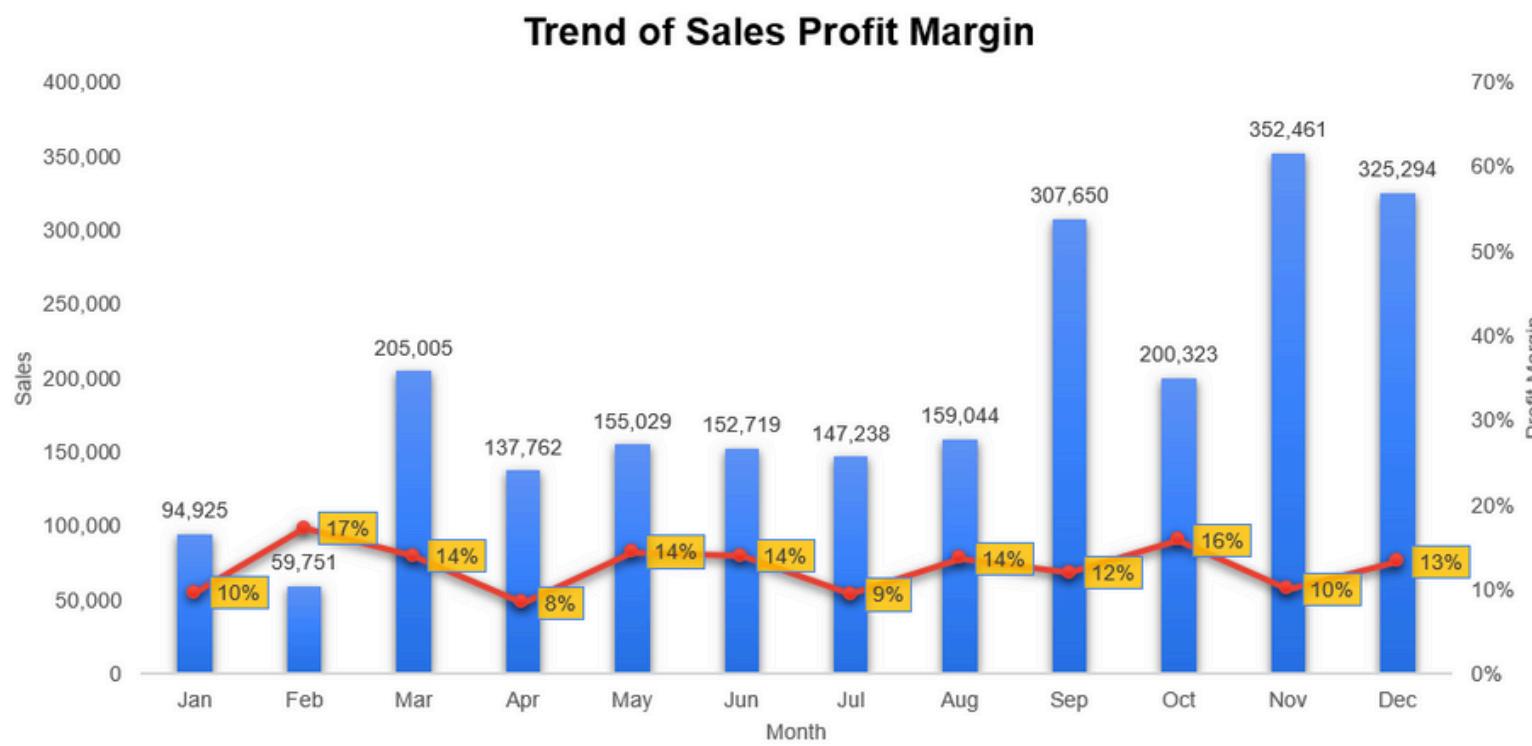


Key Performance Indicators (KPIs):

- **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%
<b>Grand Total</b>	<b>2297200.86</b>	<b>0.124672172</b>

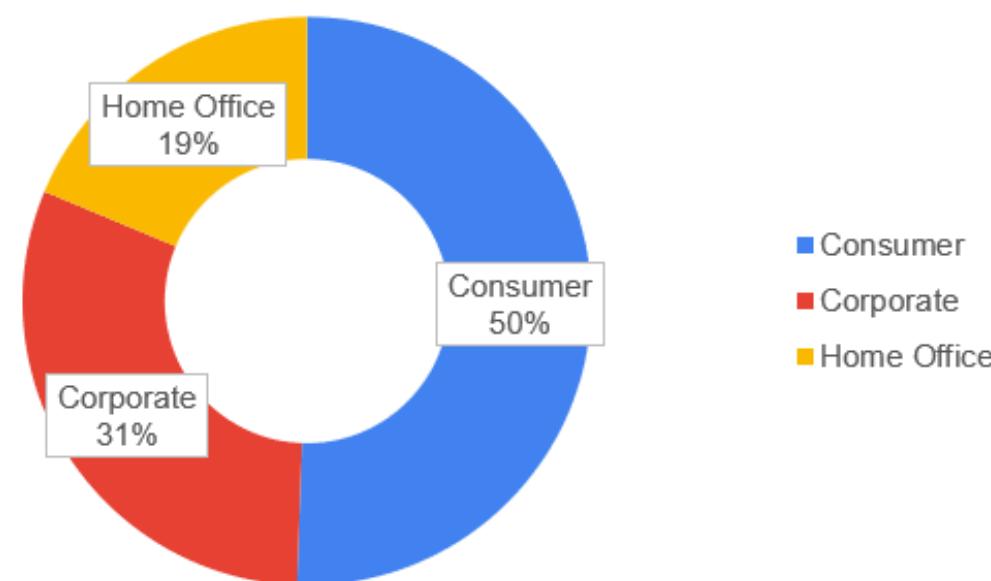


- Sales exhibited a fluctuating trend throughout the year, with the highest peaks occurring in November and December.
- Profit margins remained relatively stable, ranging between 8% and 17%, with the highest margins recorded in February and October.
- Increases in sales did not always correspond to higher 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
<b>Grand Total</b>	<b>2297200.86</b>

Sales in Each Segment

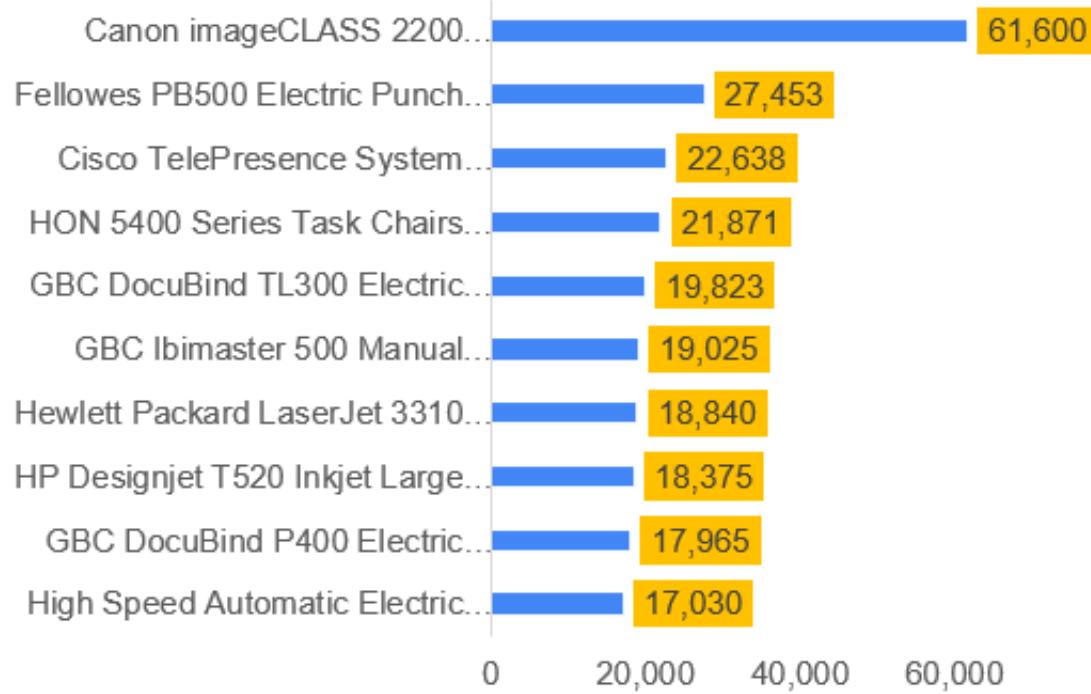


- The Consumer segment contributes the largest share of total sales, making it the primary revenue driver.
- The Corporate segment shows strong performance as the second-highest contributor.
- Home Office generates the lowest sales, indicating a smaller but potential growth segment.

# PRODUCT PERFORMANCE ANALYSIS

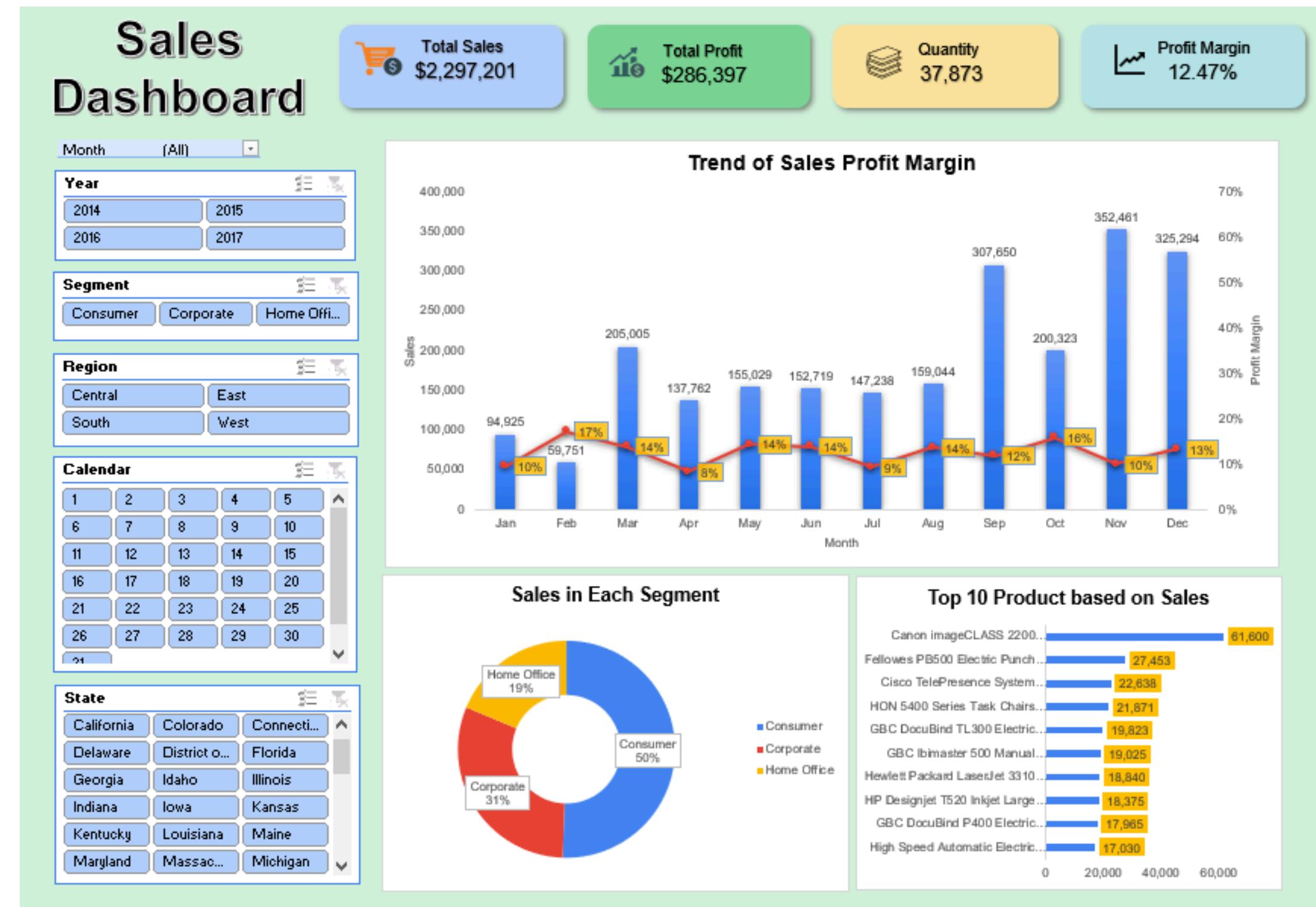
Row Labels	Sum of Sales
High Speed Automatic Elect	17,030
GBC DocuBind P400 Electric	17,965
HP Designjet T520 Inkjet Lar	18,375
Hewlett Packard LaserJet 33	18,840
GBC Ibimaster 500 Manual F	19,025
GBC DocuBind TL300 Electr	19,823
HON 5400 Series Task Chai	21,871
Cisco TelePresence System	22,638
Fellowes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

**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.

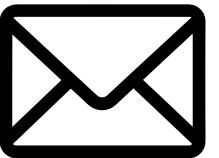
# SUGGESTIONS

- 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**