

DATA ANALYSIS & KPI DASHBOARD

Sales & Operational Performance Dashboard

Turning fragmented operational data into clear, interactive business insight.

CLIENT	ABC Manufacturing	INDUSTRY	Manufacturing
ROLE	Business Analyst / Dashboard Developer	TOOLS	Excel • Power BI • DAX

THE CHALLENGE

From Manual Reporting to a Centralized Performance View

ABC Manufacturing relied on manually prepared departmental spreadsheets with inconsistent formats, KPI definitions, reporting schedules, and multiple report versions. Leadership spent significant time consolidating and reconciling information before it could be used for decision-making.

BUSINESS NEED • Standardize executive KPI reporting • Reduce repetitive manual consolidation • Improve visibility into trends and exceptions	SOLUTION • Centralized interactive dashboard • Consistent KPI definitions and calculations • Dynamic filtering and drill-down detail
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PROJECT GOAL

Transform raw operational data into timely, accurate, and actionable business intelligence.

ANALYSIS & APPROACH

Business requirements first. Dashboard design second.

The dashboard was developed as a business-analysis solution, not simply a visualization exercise.

01	Understand	Clarified reporting challenges, leadership needs, decision points, and success criteria.
02	Define	Selected and standardized KPIs aligned to financial, sales, operational, delivery, and customer performance.
03	Prepare	Validated the sample dataset, corrected calculations, addressed appropriate blanks, and structured fields for analysis.
04	Build	Created measures, filters, charts, KPI cards, and detail views to support both summary and operational analysis.
05	Validate	Tested calculations, filtering behavior, responsiveness, usability, and consistency against expected results.

KPI FRAMEWORK

Revenue Financial performance and sales growth	Operating Cost Cost visibility and operational spending
Profit Margin Efficiency in converting revenue to profit	Orders Volume and workload visibility
Customer Satisfaction Customer experience and service quality	Delivery Performance Timeliness and fulfillment effectiveness

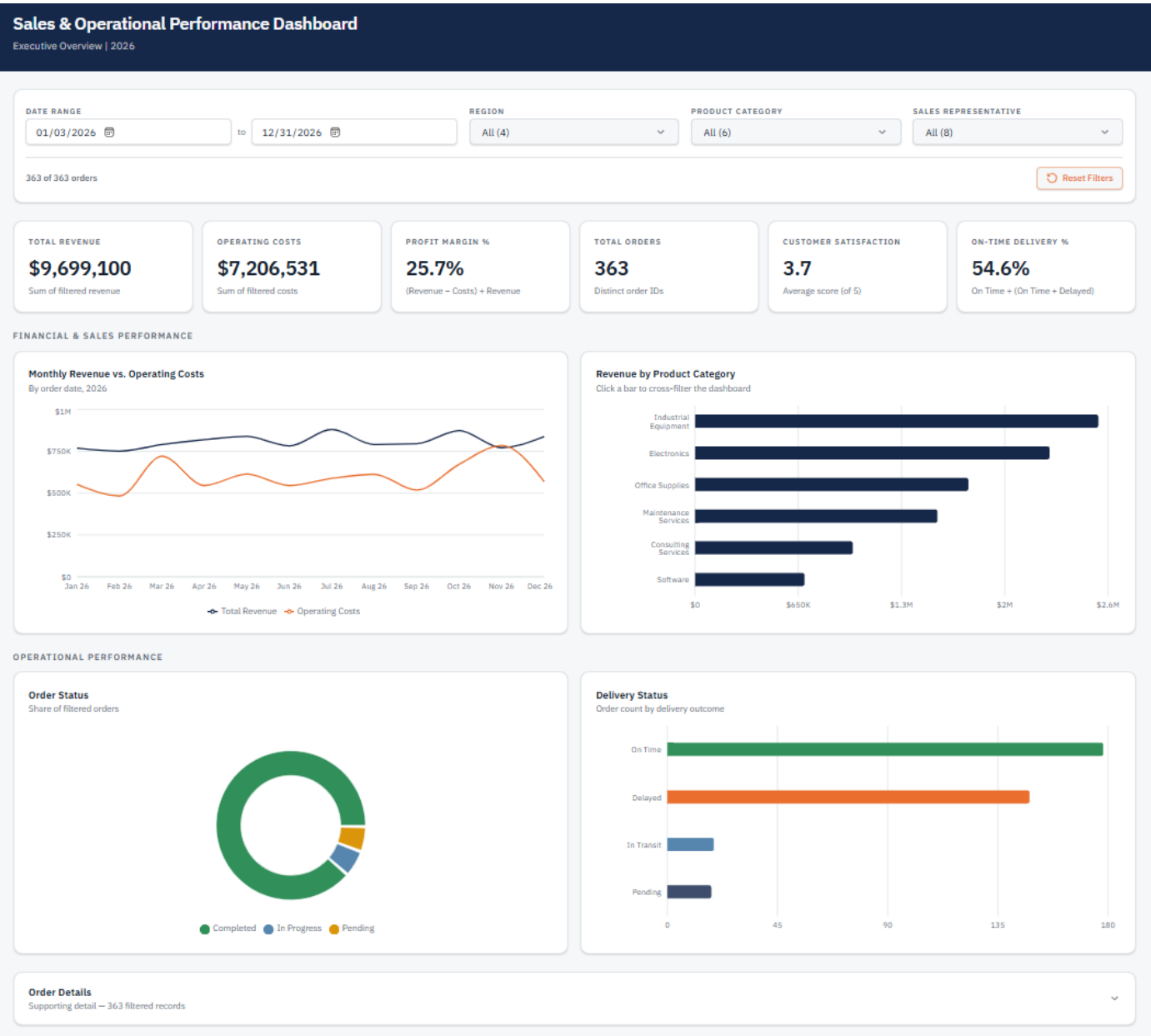
SAMPLE DATASET

363 unique orders across 13 fields, including date, revenue, operating cost, profit margin, customer satisfaction, delivery and order status, delivery days, region, product category, and sales representative.

DASHBOARD SHOWCASE

Sales & Operational Performance Dashboard

A responsive, interactive view designed to move from executive-level KPIs to transaction-level detail.



INTERACTIVE FEATURES

6 Dynamic KPI Cards

At-a-glance performance monitoring

Trend & Category Analysis

Monthly Revenue vs. Operating Costs and Revenue by Product Category

Cross-Filtering

Selections update related KPIs and visuals

4 Business Filters

Date Range • Region • Product Category • Sales Representative

Operational Views

Order Status and Delivery Status visualizations

Order Detail

Searchable, sortable, collapsible transaction-level table

DESIGN SYSTEM

Smart PBA navy, orange, gray, and white • clean executive layout • responsive desktop/tablet/mobile behavior

BUSINESS VALUE

What the solution enables

The value of the dashboard is not the visual itself, it is faster access to consistent information for better business decisions.

Centralized Visibility

Brings key sales, financial, delivery, customer, and order information into one reporting experience.

Consistent Measurement

Uses standardized KPI definitions and calculations to reduce ambiguity across reporting.

Faster Analysis

Interactive filters and cross-filtering allow users to investigate performance without rebuilding reports.

Earlier Issue Detection

Trend, status, and category views help surface exceptions and areas requiring attention.

Decision Support

Connects high-level performance indicators with underlying order detail for informed follow-up.

Scalable Foundation

Creates a reporting structure that can be expanded as data sources and business requirements mature.

CAPABILITIES DEMONSTRATED

Business Analysis • Requirements Definition • Data Validation • KPI Development • DAX Measures
Dashboard Design • Data Visualization • Testing & Quality Review • Executive Reporting

FROM DATA TO DECISIONS

Smart PBA Solutions combines business analysis, data interpretation, and practical reporting design to turn information into usable business insight.

Smart Support. Smarter Results.

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