DESIGNING A MULTI-REGION SALES PERFORMANCE DASHBOARD FOR A FAST-GROWTH RETAIL CHAIN

1. Background and Problem Statement:

A rapidly expanding retail chain with over 50 outlets across multiple regions in India faced challenges in monitoring sales performance consistently. Managers relied on static Excel reports with delayed updates, leading to poor visibility into real-time performance, regional trends, and sales team productivity. The brand needed a dynamic and centralized sales dashboard built in **Google Data Studio** to enable **real-time decision-making** across product lines and locations.

2. Objectives:

- To build a centralized sales dashboard tracking regional, product-level, and sales team KPIs
- To integrate multiple data sources and automate reporting workflows
- To enable drill-down analysis by region, outlet, and product category
- To visualize growth trends, performance benchmarks, and target achievements

3. Methodology:

Data Sources and Tools:

- **Google Sheets**: Daily sales entries synced from POS systems
- **CRM Export**: Sales rep assignment and follow-up data
- **Google Data Studio (Looker Studio)** for dashboard design and visualization

Steps Taken:

1. **Data Preparation and Integration:**
    - Merged sales data with CRM data using common outlet and sales rep IDs
    - Cleaned inconsistencies in date formatting, product codes, and region labels
    - Created calculated fields (e.g., revenue per unit, YoY growth, sales per rep)
2. **Dashboard Design Features:**

- Filters: Region, Store, Product Category, Sales Rep, Date Range
- KPIs: Total Revenue, Units Sold, AOV, YoY Growth, Target vs. Actual
- Charts Used:
  - Regional Bar Charts
  - Monthly Trend Lines
  - Sales Rep Leaderboard Tables
  - Product Category Heatmaps
- Drill-down paths from national > regional > outlet > rep level

3. **Accessibility and Permissions:**
   - Shared via Google Workspace with view/edit rights segmented by role
   - Exportable PDF snapshots for regional review meetings

4. Results:

- Real-time visibility into daily and monthly sales across 7 zones
- Store managers used drill-down filters to identify underperforming SKUs
- Regional managers used leaderboard insights to initiate performance-based coaching
- Automation reduced reporting preparation time by **90%**
- The dashboard supported a **12% increase in sales goal achievement** within 3 months of adoption

5. Interpretation and Insights:

- Sales performance varied significantly by region—northern and western zones outperformed east and south
- Certain sales reps consistently exceeded targets, while others lacked follow-up data (CRM input gaps)
- Heatmaps identified top-selling SKUs that were missing from underperforming stores
- Real-time data availability led to faster discount approvals and stock adjustments

6. Recommendations:

- Expand the dashboard with inventory and footfall data for a complete retail overview
- Add alerts for low-performing outlets and stagnant SKUs
- Standardize CRM entry for accurate sales attribution
- Integrate goal-setting modules for each store manager tied to quarterly targets

7. Future Work:

- Introduce predictive charts using historical trends and seasonal effects
- Add benchmarking against industry-level sales growth data
- Build a mobile-optimized dashboard version for field access

8. Stakeholder Relevance:

Academic:

- Teaches practical dashboard development in BI tools for operations and sales analytics
- Applies concepts of data integration, KPI tracking, and interactive design

Corporate:

- Helps multi-location retail companies improve sales tracking, decision speed, and employee accountability
- Acts as a plug-and-play visual reporting solution integrated with existing POS and CRM systems