

NATIONAL SALES DASHBOARD WITH REGION-WISE PERFORMANCE AND SALES TARGET TRACKING IN POWER BI

1. Background and Problem Statement:

An FMCG distributor with nationwide operations faced difficulty in consolidating sales performance across regions and tracking progress against targets. Regional managers submitted Excel-based reports with delays and inconsistent formatting, making real-time decision-making impossible. The company needed a **centralized Power BI dashboard** to visualize regional sales data, compare performance to targets, and enable deeper insight into underperforming areas.

2. Objectives:

- To create an interactive sales dashboard showing real-time revenue, growth, and target comparisons
- To integrate regional data sources into a unified Power BI environment
- To visualize key KPIs: total sales, target achievement, YoY growth, and top-performing zones
- To support decision-making through drill-downs at zone, state, distributor, and product level

3. Methodology:

Data Sources and Integration:

- **Excel files** from regional sales teams (standardized template)
- **SQL Server**: central distributor master and product hierarchy
- **CRM Export**: sales target data and territory mapping

Tools and Technologies:

- Power BI Desktop
- Power Query for data transformation and merging
- DAX for KPIs and dynamic filtering

Dashboard Design Features:

- **Overview Page:**
 - Total Revenue, Target Achievement %, YoY Growth, Units Sold
- **Regional Drill-Down Page:**
 - Map visualization by zone and state
 - Heatmap of sales vs. target
 - Target variance indicator with conditional formatting
- **Distributor Performance Page:**
 - Distributor leaderboard by revenue and achievement
 - Sales trend lines with slicers (date, product category, state)
- **Product Insights Page:**
 - Top SKUs by revenue and volume
 - Contribution analysis by product line

4. Results:

- 100% of sales reports centralized and standardized
- Real-time comparison of actual vs. target enabled proactive adjustments
- Regional sales managers used filters to monitor underperforming territories and trigger support
- Distributor-level comparisons improved incentive design and goal alignment
- Dashboard adoption led to a **15% improvement in quarterly target achievement**

5. Interpretation and Insights:

- Target variances were concentrated in eastern and southern zones, largely due to stockout issues
- Top 10 distributors contributed over 40% of total revenue, allowing targeted performance reviews
- The product category “ready-to-eat” showed above-average growth YoY but had low margin contribution
- Visual indicators and KPI cards made executive reviews more efficient and data-driven

6. Recommendations:

- Introduce monthly target recalibration based on real-time dashboard data
- Launch incentive dashboards for distributors to self-monitor performance
- Integrate inventory data into the dashboard to identify supply chain gaps behind target misses
- Create mobile-optimized views for on-field sales managers

7. Future Work:

- Add dynamic benchmarking against previous campaigns or similar zones
- Include profit margin analytics alongside revenue
- Automate data uploads via scheduled refresh and Power BI gateway
- Integrate Power BI Service alerts for threshold breaches (e.g., sales < 80% of target)

8. Stakeholder Relevance:

Academic:

- Demonstrates applied business intelligence in territory-level sales analytics
- Suitable for case studies in performance management, operations analytics, and Power BI training

Corporate:

- Enables distributed sales teams to collaborate around a single source of truth
- Reduces time spent on reporting and increases responsiveness to sales underperformance