

SALES CONVERSION DASHBOARD FOR A MULTI-CITY RETAIL CHAIN

Background and Objective:

A leading mid-sized retail chain with stores in five major Indian cities faced challenges in identifying which products, stores, and campaigns contributed most to revenue. The client needed a unified, interactive dashboard in Tableau to compare store performance, analyze product-level sales, and assess campaign impact.

Objective:

To create a Tableau dashboard that enables management to monitor key sales KPIs, conversion rates, and inventory dynamics in real time, helping improve store-level strategies and pricing decisions.

Methodology:

1. KPI Identification:

- Store-wise revenue, units sold, and footfall
- Conversion rate = $(\text{Units Sold} \div \text{Footfall}) \times 100$
- Promotion impact score = % increase in sales during campaign periods

2. Data Processing:

- Daily sales and footfall data were merged by store and product
- Missing or inconsistent entries were flagged and excluded
- Store metadata (location, size) was joined for comparative filtering

3. Dashboard Design Principles:

- Multi-tab layout: Overview, Product Insights, Store Comparison, Promotions
- Filters: Date range, City, Product Category, Store Name
- Charts:
 - Time-series line chart for sales trends
 - Bar chart for top-performing products

- Heat map for regional conversion rates
- Scatterplot comparing footfall and revenue

Data Sources:

- POS system extracts (CSV files) from 5 stores
- Weekly promotional campaign calendar (Excel)
- Store metadata (location, area) from central ERP system

Tools and Technologies:

- **Tableau Desktop** – dashboard creation
- **Excel** – initial preprocessing and metadata cleaning
- **Tableau Prep** – join and clean multi-source data

Results and Interpretations:

- **Store-Level Conversion Rates Identified:** Chennai and Pune stores had high footfall but low conversion, indicating need for sales training or stock optimization.
- **Top-Selling Products by City Visualized:** Seasonal products performed better in North India while premium SKUs did better in urban metros.
- **Promotion Impact Made Quantifiable:** Campaign X in April showed a 28% sales increase, while Campaign Y had no visible effect, suggesting better targeting is needed.
- **Leadership Reporting Enhanced:** The Tableau dashboard replaced static Excel reports, improving data accessibility and speed of insight.

Conclusion:

The final Tableau dashboard provided a visual, filterable summary of sales KPIs across cities, helping the retail chain identify underperforming stores, products, and ineffective promotions. Store managers began using the dashboard weekly to realign their sales priorities and staffing.

Future Work:

- **Integration with Real-Time API Data:** Enable automated daily refresh using live data connectors.

- **Customer Segmentation:** Incorporate loyalty program and demographic data to analyze buyer profiles.
- **Inventory Alerts:** Add color-coded flags to signal low stock or overstocked SKUs.
- **Mobile Optimization:** Design simplified mobile view for store managers.

Suitability:

- **Academic:** Can be used to teach business analytics, KPI tracking, and Tableau visualization in MBA/Data Analytics programs.
- **Corporate:** Directly deployable in sales/retail analytics teams for real-time store and product performance monitoring.