



Leading building materials company gets Power BI sales analytics dashboards to track their major KPIs

Business Description

Our client is a one of the leading groups for specialty performance coating products. The products of the company help in protecting and beautifying anything that is made of concrete, metal, stone, wood, glass, or plastic.

Challenge

Our client wanted **data management and visualization** for their existing dataset using **Power BI reports**. They had an existing reporting system but since his was not fetching accurate and required results they needed to update this system. However, they were not sure about the database tables, which is why they added Beyond Key as their data modeling and visualization partner who could help them load, transform, model, analyze, and visualize data.

Beyond Key's Solution

Beyond Key understood that the data source discovery was vital to the process. We performed a thorough analysis of the source data to find the correct data table and architecture in the legacy reporting system.

Additionally, using the redesigned data architecture and reporting logic, we developed custom Power BI reports from scratch and validated them with the previous reports to make sure we added value to the client's business with accurate reporting.

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Power BI Dashboards And Reports

We created the following sales-related dashboards and reports for the client.

1. Sales By Region And Item

This was one of the major dashboards developed for the client, which offered them a quick view of their entire sales by geography and product range. The dashboard captured gross sales, net sales, profit, and margins with more details of the customer and geography-wise net sales.



2. Sales Team Performance

This dashboard showed month-to-date and year-to-date net sales by customer name. Filters could be applied to break the sales down by sales representatives. This report gave a glance at the performance of individual sales reps.

	Date Range	Brand					
	1/1/2020	3/13/2021	AND CO BRAND	SORA	URECRETE BRAND	TK BRAND	Please solvet a Guste
ales Representative		MTD_NetSales and PYMTD_NetSales by Customer_Name			YTD Net Sales and PYYTD_NetSales by Customer_Name		
ALWENDOW KER MORRES OMTO_NetSales OFFINTO_NetSales					YTD Net Sales PYYTD_NetSales		
MNDALW PIJOSH C	MIRE VAN	Customer 1		1350	STAL SKK	Customer 1	1014V
ANDREW	MATRICK.	Customer 2 Customer 3		254 605 505	CHIOTING CONTROL	Customer 2 Customer 3	BOLTON BOLTON
BILL JOHN	SOUTHWENT	Customer 4 Customer 5	1 (AL)	158 164	10.01	Customer 4 Customer 5	AD TIME AD TIME SA YOM
QUNNUS HEATH	STEVE	Customer 6	File	4100 3860		Customer 6	50.1054 20.7054 0.2.664
16		Customer 7 Customer 8 Customer 8 Customer 9		396		Customer 7 Customer 8 Customer 9	10.044
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JOSH COVERLY		Customer 14 Customer 15	046.4	21K 22K	1111	Customer 14 Customer 15	SEDAN) SEDAN
JUSTINI WHEATLEY			OK MTD NetSales and F		100K		S0.0M S0.2M S0.4M ITD Net Sales and PYYTD NetSales (Milli)

3. Order And Order Average Of 11 Days

This was a specific dashboard for client that reported KPIs by order value with an average of 11 days. Total order value by the individual brand was shown in a pie chart. The number of orders could be filtered with the date range and type of orders like normal and return orders.



4. Top 20 Customers

This dashboard gave a bird's eye view of their top 20 clients based on income and the business given by each of them. The dashboard tracks the total amount of invoices and the number of invoices. The company can also review this information by the pie chart in the corner.

te Range	Customer_Name	Invoice Total	Invoice%	No of Invoices	CustType
	Customer 1	\$282,919	6.04	211	e cc e si
tomer Name	Customer 2	0202,515	0.04	211	SU TK
Customer 1		\$181,431	3.87	40	
Customer 2	Customer 3				\$4,686, \$1,896,7. Invoice Total Sales Top 20 Cu
Customer 3		\$160,080	3.42	32	42
Customer 4	Customer 4	\$153,273	3.27	8	% Sales from To
Customer 5	Customer 5	\$133,574	2.85	45	SOM (S.,) - SZM Brand SSIERRA
Sustomer 6	Customer 6	\$105,712	2.26	27	
Customer 7 i					• CCI BRA
Customer 8	Customer 7	\$87,311	1.86	9	(31.76%) © BURKE
Customer 9	Customer 8	\$81,258	1.73	3	MonthY % Sales from Top 20 Customers
ustomer 10	Customer 9				Jan-21 10 Nov-20
ustomer 11		\$78,219	1.67	43	Dec-20

5. Top 20 SKUs By Sales

This intuitive dashboard gives the top 20 products by sales and breaks down the invoice totals by territory and brand. Other than this month-wise sales percentage from the top 20 SKUs is also depicted with a line chart.



Data Flow Architecture





Results

With the implementation of powerful and robust BI reports and dashboards, the client team could view and manage their business and scale up the sales productivity.

- **Data sources**: Identify the right data table sources and the capability to update this data as necessary.
- Scalable reporting process: Get accurate reports with the right data mapping and measures.
- **360-degree view of the performance**: Get a visually strong system with a consolidated performance of the business at first glance.
- **Improved productivity:** Easy navigation between pages with information on how to use a particular visual for understanding.
- Time and cost efficiencies
- Data security: Reports in Power BI is backed up Advanced level of data handling security.

