

Project Name: Retail Daily Sales Reporting

Project Description:

Overview: A client in the retail industry needed daily sales and other KPI reporting and was regularly preparing reports as best it could using disjointed data sources.

Details: The client needed daily sales reports for all their stores (ecommerce and physical stores) that reported key information such as sales, units sold, foot/digital traffic, orders, etc. The company's existing process was to manually pull the data from many different sources and manually key it into a template. This manual process was causing reports not to be timely, and human error often made the reports inaccurate.

Work Completed:

Over four weeks, built a standardized Excel template that allowed data from standardized reports from various systems to be simply copy and pasted. Once the data was entered, the template would automatically populate all desired report information in an easy to read/print/share format.

Outcome:

The reporting process went from many hours of manual manipulation and entry to a 15-minute maximum exercise. The output was also significantly more accurate and typically only gave errors when there were systems issues. The report recipients (primarily business leaders) were very happy to begin receiving an accurate version of the report at predictable intervals.

Report executed at 9:01 AM

Current Year					Prior Year					Variance				CY Other Metrics	
Date	Sales	Orders	Units	Traffic	Date	Sales	Orders	Units	Traffic	Sales	Orders	Units	Traffic	Units Per Order	AOV
1/1/2024	\$ 367	15	25	469	1/2/2023	\$ 309	9	3	313	\$ 59	6	22	156	2	\$ 24
1/2/2024	\$ 950	50	61	920	1/3/2023	\$ 478	7	11	369	\$ 472	43	50	551	1	\$ 19
1/3/2024	\$ 584	15	40	469	1/4/2023	\$ 549	2	26	440	\$ 35	13	14	29	3	\$ 39
1/4/2024	\$ 41	2	26	170	1/5/2023	\$ 28	12	15	23	\$ 14	(10)	11	147	13	\$ 21
1/5/2024	\$ 642	23	28	719	1/6/2023	\$ 338	10	24	645	\$ 304	13	4	74	1	\$ 28
1/6/2024	\$ 644	25	26	764	1/7/2023	\$ 154	9	13	302	\$ 490	16	13	462	1	\$ 26
1/7/2024	\$ 546	18	31	563	1/8/2023	\$ 472	5	6	248	\$ 73	13	25	315	2	\$ 30
1/8/2024	\$ 8	2	19	37	1/9/2023	\$ 0	18	7	23	\$ 8	(16)	12	14	9	\$ 4
1/9/2024	\$ 42	2	19	63	1/10/2023	\$ 8	2	5	49	\$ 34	0	14	14	9	\$ 21
1/10/2024	\$ 559	38	81	690	1/11/2023	\$ 419	12	6	500	\$ 140	26	75	190	2	\$ 15
1/11/2024	\$ 332	18	18	563	1/12/2023	\$ 136	14	14	530	\$ 196	4	4	33	1	\$ 18
1/12/2024	\$ 779	25	22	393	1/13/2023	\$ 569	14	11	71	\$ 210	11	11	322	1	\$ 31
1/13/2024	\$ 886	33	27	1,031	1/14/2023	\$ 866	4	14	340	\$ 20	29	13	691	1	\$ 27
1/14/2024	\$ 507	12	42	493	1/15/2023	\$ 38	22	29	25	\$ 469	(10)	13	468	3	\$ 42
\$6,887					\$4,363					\$ 2,524				137 281 3,466	