

**Case study:** Sales Progress Dashboard  
**Client:** The Sock Agency, Sydney

**Brief**

To design and develop a two-page data dashboard with the aims of:

- Providing clearer and more timely insights into the sales activities of the business
- Reducing the time it takes to manage and prepare regular reports
- Supporting the board, managers, and sales agents to make informed (and often time-critical) decisions

**Background**

The Sock Agency has always placed a high importance on understanding their business data to achieve monthly and annual sales targets. However, the monthly reports were not effectively communicating key messages about the business, and they were time-consuming to pull together. The company recognised the significant impact moving to dashboard-style reporting could have on their shared understanding and business decisions, but needed additional expertise and resource to develop a dashboard tool and implement the fresh approach.

The Data Refinery worked with The Sock Agency to understand their needs, and recommended an excel-based tool. Using excel had the advantage of no additional investment in software, and working with a package employees were already familiar with. The Data Refinery uses advanced excel techniques to mimic the functionality of dashboard software (a web-based tool such as Tableau is more appropriate for some projects).

**Solution and project outputs**

- Excel dynamic dashboard tool to monitor sales progress against budget, prior year and forecasts
- Updating graphs activated by month drop down
- File includes source data tables, which draws upon exports from existing systems, and pdf-friendly 2-page report (similar to sample page right)
- Updating steps and troubleshooting guide
- Data quality recommendations
- Consultancy advice on implementation, roll out procedures and next steps

**Client testimony**

“ Kathryn took over half a million cells of data, and created a simple dashboard, that has quickly become a key part of our decision-making process. The sales team and management board alike can easily grasp the weekly, monthly and annual company dynamics, and take action to maximise sales. Having professional input provided the injection of expertise and resource we needed to step up our sales operations.”

– Andrew Gilroy, Operations Manager

**Skills and knowledge demonstrated**

- Vision, advice and constructive challenge on project objectives and outcomes
- Understanding of business data and objectives
- Attention to detail and ability to channel the detail into higher level messages
- Bespoke excel dashboard design, with dynamic features that automatically update with new source tables
- Creation of simple and engaging reports, that are intuitive to update and understand
- Ability to find creative and practical solutions to data, technical and operational challenges

**Other potential applications of this approach**

- Transforming the curation and visual presentation of performance and financial reporting in the public sector
- Using online, interactive data software to share insights that allow for active filtering and drill-down views (The Data Refinery provides a Tableau design and publish service)
- Monitoring cashflow patterns, inventory, profit and loss and expenses

