

Sales Intelligence & Margin Analytics System

INTERNAL REVENUE OPERATIONS DASHBOARD

The Revenue Visibility Gap

Revenue data was fragmented across disconnected spreadsheets, requiring hours of manual reconciliation before margin analysis could begin. By the time reports were reviewed, the data was already stale — leaving leadership without the real-time signals needed to act on high-value accounts.

→ Fragmented Data

Revenue spread across siloed spreadsheets with no unified view

→ Manual Reconciliation

Margin analysis required time-intensive, error-prone manual work

→ Stale Reporting

Reports outdated by the time leadership reviewed them

→ No Account Ranking

Zero structured visibility into highest-value or highest-margin accounts

System Built

A unified revenue and margin intelligence dashboard aggregating **150+ customer accounts** into a structured, operator-facing analytics interface — purpose-built for speed, clarity, and executive decision support.



Real-Time Aggregation

Live revenue roll-up across all accounts



Margin-Aware Ranking

Accounts ranked by margin contribution, not just revenue



Top 10 Visualization

Instant view of top revenue and margin performers



Export-Ready Reports

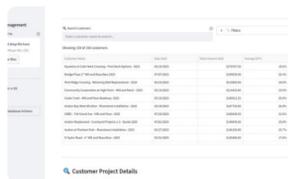
CSV/Excel output structured for leadership review

System Interface



Master Customer List

Full account overview with searchable, filterable customer-level data across all 150+ accounts



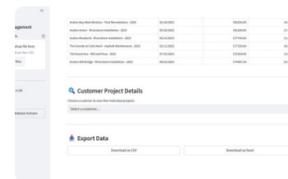
Top 10 by Revenue

Ranked visualization of highest-revenue accounts for immediate executive identification



Top 10 by Margin

Margin-aware ranking that surfaces accounts contributing most to bottom-line profitability



Drill-Down & Export

Customer-level deep-dive with structured CSV/Excel export ready for leadership distribution

Revenue and margin intelligence surfaced in a unified, operator-ready interface.

Operational Outcomes

- 150+ Accounts Unified**
Consolidated into a single intelligence layer, eliminating data silos
- Automated Segmentation**
Margin ranking and revenue segmentation executed without manual effort
- Faster Decisions**
Leadership decision speed improved with instant access to high-profit account signals
- Standardized Reporting**
Consistent revenue reporting structure deployed across the organization

Technical Architecture

Data Modeling

Normalized revenue + margin datasets with structured aggregation logic

Analytics Layer

Margin-aware ranking engine with revenue segmentation rules

UI & Interaction

Non-technical operator design with search, filters, and export controls

Export Framework

CSV / Excel structured output formatted for leadership consumption

Design Principle

"Revenue data is only useful when it drives action."

The system was designed to eliminate spreadsheet dependency and surface the most critical revenue signals immediately — ensuring leadership focuses on **margin contribution**, not just top-line volume.

1

Revenue Intelligence

2

Data Modeling

3

Dashboard Design

4

Decision Support Systems