

Implementation of Microsoft Power Bi in Monitoring Product Sales to Maximize Sales Potential and KPI Sales at PT UPS (PT Unggul Prima Sejati)

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Abstract

This study discusses the implementation of Microsoft Power BI as an effective tool in monitoring product sales and maximizing sales potential. In an increasingly connected and data-driven business era, a deep understanding of sales data and its intelligent use can give companies a competitive advantage. This paper will explain why Microsoft Power BI is the right solution, implementation steps, and its benefits in monitoring product sales and optimizing sales potential.

Keywords: sales, kpi, microsoft power bi.

INTRODUCTION

Sales are one of the most important aspects of business operations. The success of selling products or services greatly affects the growth and sustainability of the company. In the ever-evolving digital era, companies are faced with a large and complex amount of sales data. To take full advantage of sales potential, companies need to have effective tools to monitor, analyze and make decisions based on relevant sales data. This is where Microsoft Power BI plays an important role. Power BI is a powerful business analytics platform that enables companies to collect, integrate and analyze sales data efficiently. By aggregating data from multiple sources, Power BI provides in-depth insights into sales performance, market trends, and factors influencing sales decisions. In the context of sales, Power BI provides the ability to visualize sales data in real-time, identify trends and patterns in data, and measure and monitor important Sales KPIs. By using interactive visualizations, customizable reports, and advanced analytical features, Power BI helps companies make smart and timely decisions to increase sales effectiveness, optimize sales processes, and achieve set sales targets.

In conclusion, Power BI is an effective tool for monitoring and analyzing sales data, maximizing sales potential, and measuring sales performance. By leveraging the power of Power BI, companies can make decisions based on deep insights, improve sales efficiency, and achieve sustainable business growth.

Monitoring Sales Performance: One of the main goals of sales is to monitor and track sales performance. By using Power BI, companies can collect and integrate sales data from various sources, and visualize this data in the form of informative dashboards. This goal helps

the sales team understand sales trends, identify areas that need improvement, and monitor the achievement of sales targets.

Analyze Sales Data: Power BI enables in-depth analysis of sales data. This goal includes understanding sales trends, analyzing customer segmentation, identifying new sales opportunities, and analyzing product or service profitability. By analyzing sales data using Power BI, companies can make decisions based on accurate and reliable insights. **Optimize Sales Potential:** Power BI assists companies in optimizing their sales potential. By leveraging the insights gained from analyzing sales data, companies can identify new sales opportunities, develop more effective sales strategies, and optimize the use of resources to achieve maximum sales results. These objectives include increasing revenue, growing market share, and increasing customer satisfaction.

Measuring Sales KPIs: Sales KPIs are metrics or indicators used to measure sales performance. Power BI enables companies to create dashboards and reports that display relevant Sales KPIs, such as revenue, number of new customers, sales conversions, customer retention rates, and so on. These objectives assist the sales team and management in tracking target achievement, identifying performance trends, and taking necessary corrective actions.

Make Data-Driven Decisions: Power BI enables companies to make decisions based on accurate and up-to-date sales data. With interactive data visualizations, customizable reports, and powerful analytics features, Power BI provides in-depth insights into sales performance, market trends, and customer preferences. This goal includes making intelligent decisions, planning effective sales strategies, and optimizing the use of available resources.

Overall, the goal of sales and use of Power BI is to improve sales performance, maximize sales potential, and achieve desired sales results. By leveraging Power BI's powerful data analysis capabilities, companies can make informed decisions, improve operational efficiency, and achieve sustainable business growth.

METHOD

Power BI implementation in sales strategy requires a structured methodological approach. Here are steps you can follow to use Power BI effectively in your sales efforts:

- a) **Identify Needs and Goals:** The first step is to identify specific needs and goals to be achieved through using Power BI in sales. For example, is the goal to monitor sales performance, identify new sales opportunities, or optimize sales strategy. By identifying these goals, a more targeted and focused approach can be developed.
- b) **Data Source Mapping:** Next, identify and map relevant data sources to achieve sales objectives. Decide which internal data source to use, such as a sales system, CRM or inventory system. Also, consider external data sources that can provide greater insight into market or industry trends. Ensure that this data source is connected and accessible via Power BI.
- c) **Dashboard Planning and Design:** In this step, planning and designing the dashboard that will be used to visualize sales data. Identify the key metrics you want to display, such as sales revenue, number of new customers or conversion percentage. Create layouts and visualizations that match your business needs and sales goals. Make sure that the dashboard is designed in a way that is easy to

- understand and allows users to get quick and easy insights.
- d) **Data Integration:** Integrate data sources with Power BI and ensure that the required data is available and connected correctly. Take the necessary steps to clean and transform the data to suit your analysis needs. Ensure that data is imported with high accuracy and consistency.
 - e) **Reporting and Analysis Generation:** In this step, use Power BI data modeling and analytics tools to create reports and analysis relevant to sales objectives. Use interactive visualizations and easy-to-understand graphs to present sales data effectively. Identify patterns, trends or anomalies in sales data that can provide important insights to sales teams.
 - f) **Sharing and Collaboration:** After reports and analysis are created, share information and dashboards with members of the sales team and other relevant parties. Allows access to real-time dashboards and provides collaboration capabilities to discuss and analyze sales data together. Provide the possibility to customize and filter data to suit individual or team needs.
 - g) **Evaluation and Improvement:** Continue to evaluate the use of Power BI in sales efforts and identify areas for improvement. Review sales performance, customer response and effectiveness of implemented sales strategy. Use insights from Power BI to identify improvement and development opportunities that can improve overall sales results.

It is important to note that the methodology applied may vary depending on individual business needs and characteristics. Adjusting and developing the right approach will help maximize sales potential through the use of Power BI.

RESULT AND DISCUSSION

a. Problem Statements:

PT UPS is a company that is trying to improve its sales performance. However, the company faces several major problems. Lack of understanding of monthly sales trends, which causes difficulties in strategic planning and efficient allocation of resources. There is no recent data regarding the cumulative sales performance of each branch, making it difficult to compare and evaluate the performance of these branches. There is a lack of information about the contribution of individuals in the marketing team to sales, which hinders the development of effective marketing strategies and the provision of appropriate incentives.

b. Insights

With the MONTHLY SALES Chart, PT UPS can better understand monthly sales trends. This graph will provide an overview of sales patterns, so that companies

can make more informed decisions in resource allocation, scheduling, and setting sales targets.

The ACUMULATIVE SALES Chart PER BRANCH allows PT UPS to have a clear picture of the sales performance of each branch. With this, the company can identify branches that are performing well and those that need improvement, and take appropriate steps to drive overall performance improvement. Through the TOP 5 MARKETING PER MONTH Chart, PT UPS can identify individuals in the marketing team who make the biggest contribution to sales. This will enable companies to provide the right incentives as well as adapt successful strategies into overall team training and development.

c. Story telling:

PT UPS, a company that aims to become a leader in its field, realized that they needed to overcome some crucial hurdles in increasing sales. To achieve its goals, the company implemented three important data visualization tools. First, by implementing the MONTHLY SALES Chart, PT UPS managed to gain insight into how sales fluctuate from month to month. This allows the management team to make more informed decisions in terms of scheduling, sales targets and resource allocation. Then, the company started using the ACUMULATIVE SALES Chart PER BRANCH to monitor the performance of its branches. With this data at their fingertips, the management team can quickly identify branches that need additional support and those that are worthy of being an example to others.

Finally, with the TOP 5 MARKETING PER MONTH Chart, PT UPS is taking a big step in optimizing its marketing team. By recognizing and incentivizing high-performing marketers, and adopting their strategies more broadly. According to the research that we did, before our data was loaded on Power BI, we did training first. In addition, we use original data from the company, therefore we need to make some adjustments to disguise the existing data so that the data training process that we do may seem strange. Here's the description

1. Make a sales data query by adding month and year attributes
2. Inner join with marketing and branch tables. The inner join was chosen to avoid incorrect data when input (does not have marketing or branches) but has already entered the database.
3. Create a view of the query.

4. From that view, we copy it to excel and then we replace the existing marketing name data with new name-generated data to disguise the data.
5. We create a new table "recap_sales" in the database and then we fill it in from the excel data that has been compiled in point 4
6. Load the table into power bi with the import method

CONCLUSION

1. Power BI can present an intuitive and informative dashboard to make it easier for management to evaluate.
2. To be able to display the desired report, it is better if the data is trained first in the database before being pulled into Power BI.
3. You need to be active in the Power BI forum to get template examples or measure examples to get the desired report. The Power BI community itself tends to be warm and welcome so it is very friendly for newbies.
4. Power BI by default has a FREE license. However, to publish, a PRO license is required.

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