

Performance Sales



Smart Team Performance Pro

Smart Dashboard for Analyzing Team, Manager, Sales, and Product Performance in Power BI

What is Smart Team Performance Pro?

Smart Team Performance Pro is a professional **Custom Visual** for **Microsoft Power BI**, designed to provide integrated performance analysis for sales and business teams.

This Visual displays important information such as:

 **Current and Previous Year Performance**

 **Sales Growth**

 **Target Achievement**

 **Manager Ranking**

 **Product Performance**

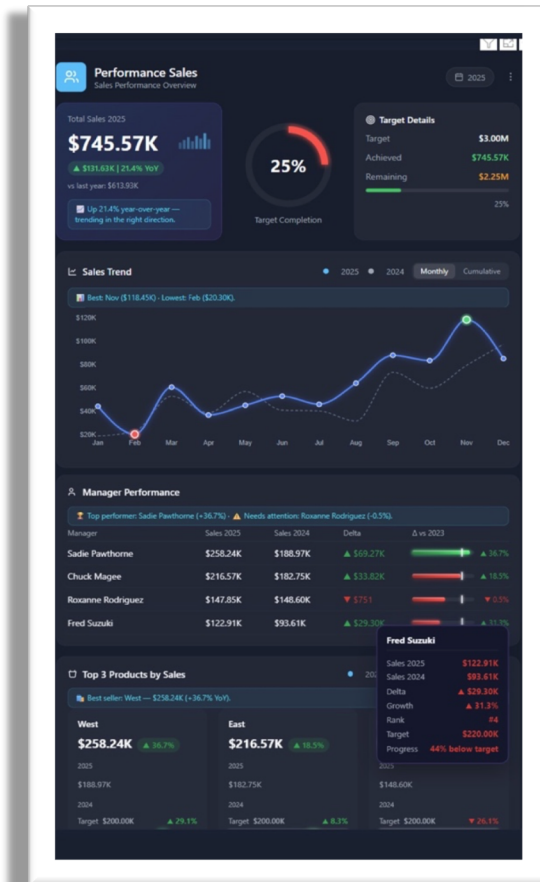
 **Sales Trend Over Time**

 **Distance to Target**

 **Best and Weakest Performances**

 **Smart Insights**

All of these are presented in an interactive and customizable environment.





Smart Team Performance Pro

The main purpose of the Visual is to enable the organization's manager to answer key management questions at a glance, instead of reviewing multiple different Charts and Tables:

- ? Has the team reached the Target?
- 🧑 Which Manager has achieved the best performance?
- 📉 Which Manager has declined compared to the previous year?
- 📦 Which products have generated the highest sales?
- 📈 How has the sales trend changed?
- 🎯 How far are we from reaching the Target?



Smart Team Performance Pro — Which Organizations Is It Suitable For?

This Visual is suitable for organizations where the performance of individuals, teams, products, or business units is important.

✨ Main Applications:

🏢 Sales and Distribution Companies

🛍️ Retail Organizations

📦 Companies with a Product Portfolio

☐ FMCG Companies

📊 Performance Management Units

🧑 Senior Managers and Executive Management

💼 B2B Companies

🏢 Service Companies

🧠 Business Intelligence Units

👥 Companies with Sales Teams

📅 Planning and Control Units

🌐 Companies with Regional Managers

📢 Sales and Marketing Units

🏠 Companies with Branches / Stores

Also, the concept of **Manager** is not limited to a Sales Manager and can, depending on the organizational structure, be assigned to different entities such as: **Manager / Sales Rep / Region / Branch / Owner / Team Leader**



◆ Value of Smart Team Performance Pro for the Organization

This Visual is not merely a sales chart; it creates an analytical layer for **Performance Management**.

◆ Faster Decision-Making

Managers can view the overall performance status on a single page and quickly identify strengths and weaknesses.

◆ Performance Comparison

Current-year performance is compared with the previous year, making the level of growth or decline clear.

◆ Target Control

The organization can define an overall Target or specific Target for Manager and Product, and view the level of achievement.

◆ Identifying the Best and Weakest Performance

The Min/Max Highlight feature helps the highest and lowest performance levels stand out more quickly.

◆ Manager Performance Analysis

Managers are ranked based on Sales, allowing the organization's manager to compare individual performance with one another.

◆ Product Analysis

The Top Products section shows which products have the largest contribution to sales performance.

◆ Trend Analysis

Sales Trend enables users to view sales trends over time and compare two years.

◆ Direct Interaction with Power BI

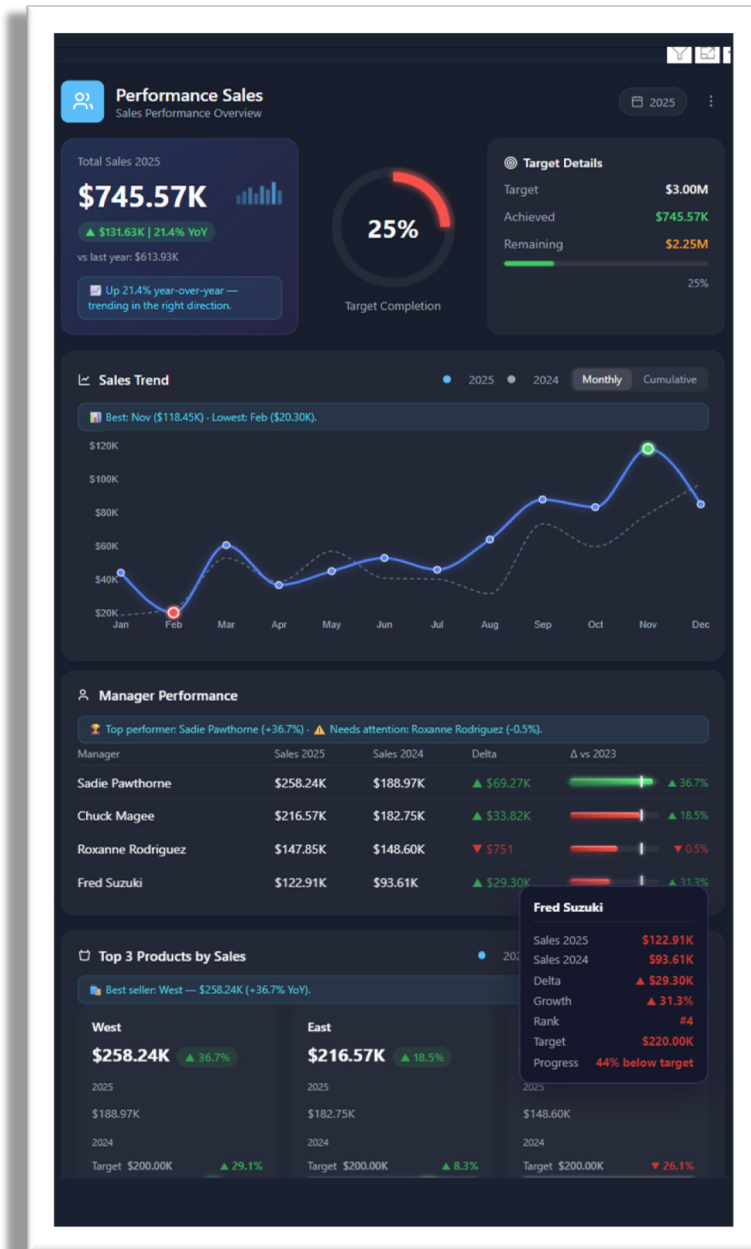
Selecting a Manager or Team applies Selection/Filtering in Power BI; therefore, the Visual can be used interactively with other Visuals in the report.

Overall Visual Structure

Smart Team Performance Pro consists of several main sections:

- KPI
- Target Completion
- Target Details
- Sales Trend
- Manager Performance
- Top Products
- Smart Insights
- Interactive Tooltip

Each section has a specific analytical purpose.



Main Data Model Fields

The visual uses several **Data Roles** for its core functionality.

◆ Field Name: Raw Date

Type: Grouping

This field represents the transaction or sales date.

It can include the order date, invoice date, sales date, or similar date fields.

Using this field, the visual can identify data from different years and analyze the **two most recent years** for comparison.

◆ Field Name: Raw Sales Value

Type: Measure

The sales or **Revenue** value that needs to be aggregated.

For example:

- Sales
 - Revenue
 - Net Sales
 - Invoice Amount
-

◆ Field Name: Target

Type: Measure

The overall **Target** for the organization or team.

This field is used to calculate **Target Completion** and display the **Target Ring**.

This field is optional.

◆ **Field Name: Manager**

Type: Grouping

The name of the person or entity whose performance should be ranked.

For example:

- Sales Manager
- Sales Representative
- Region
- Branch Manager
- Account Owner
- Team Leader

◆ **Field Name: Manager Target**

Type: Measure

The specific **Target** assigned to each Manager.

This Target can be used to provide a more accurate comparison of individual performance.

◆ **Field Name: Product**

Type: Grouping

The name of the product, category, SKU, or any similar dimension.

For example:

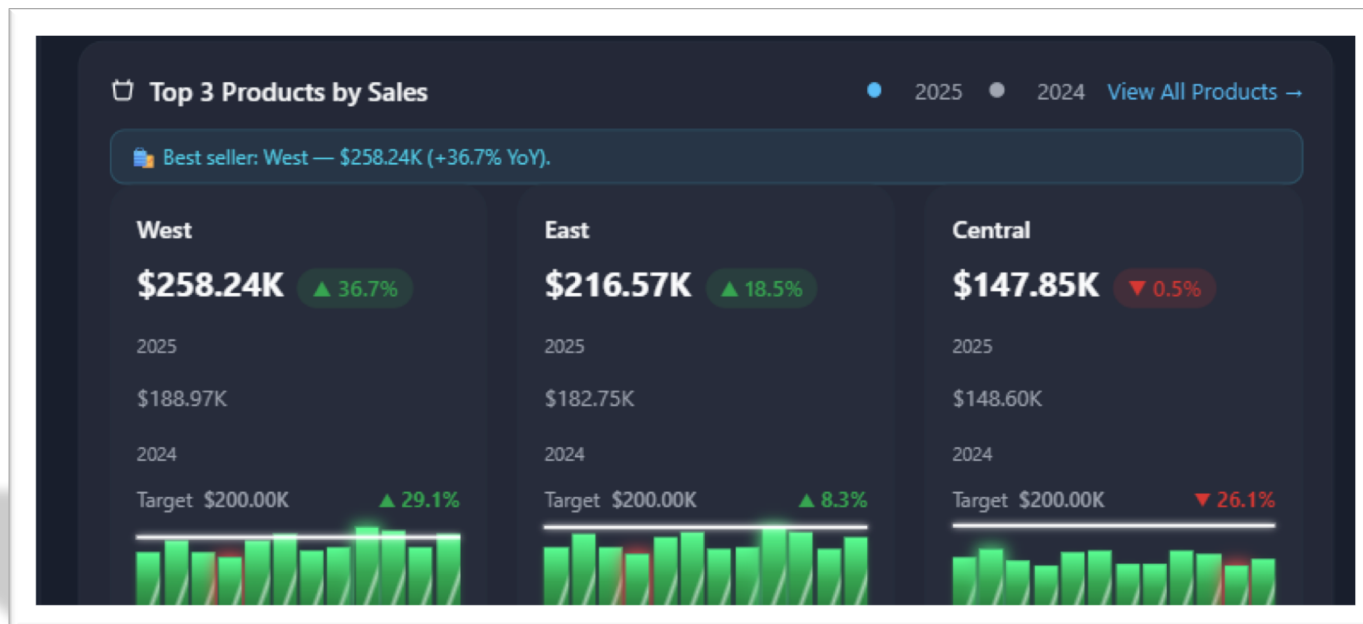
- Product
- Product Category
- SKU
- Service
- Brand

◆ Field Name: Product Target

Type: Measure

The specific **Target** assigned to each **Product**.

This field is used to evaluate the **Target Achievement** of products.



KPI Section

The **KPI** section provides a quick overview of the key performance status.

The main indicators include:

✦✦ **Current Sales**

Sales for the current period.

✦✦ **Previous Sales**

Sales for the previous period/year.

✦✦ **YoY %**

The percentage change compared to the previous year.

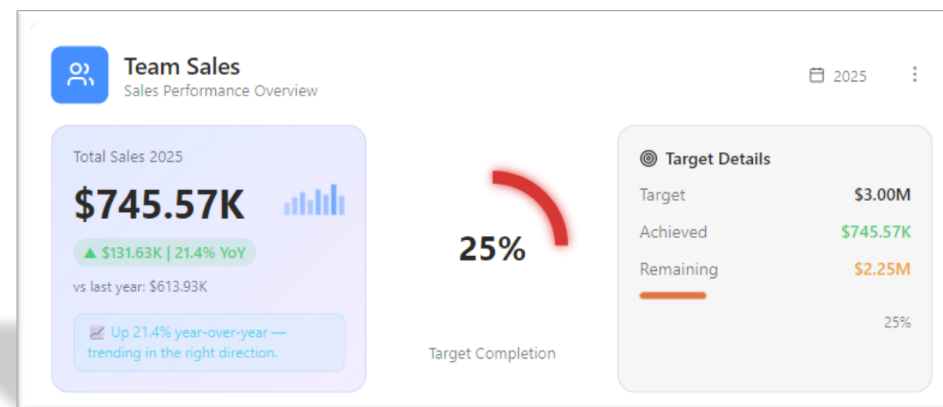
Formula: $(\text{Current Sales} - \text{Previous Sales}) / \text{Previous Sales} \times 100$

✦✦ **Target Completion %**

The percentage of the Target that has been achieved.

Formula: $\text{Current Sales} / \text{Target} \times 100$

This section is highly suitable for an **Executive Dashboard**, as it allows managers to view the overall **Performance** status at a glance without having to go into detailed analysis.



🎯 Target Ring Section

The **Target Ring** visually displays the level of **Target Completion**.

For example: **87% Target Completion**

Users can define different **Thresholds** to determine the performance status based on the percentage of Target achieved.

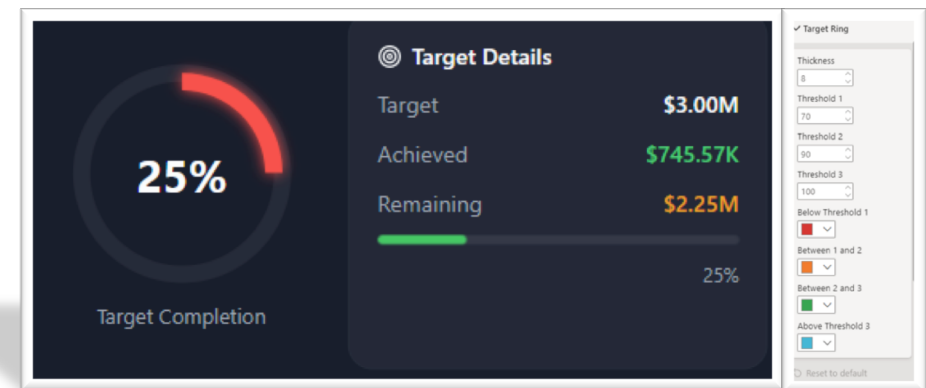
- **Threshold 1:** Lower performance boundary
- **Threshold 2:** Medium performance boundary
- **Threshold 3:** Desired performance boundary

The color of each range can also be customized:

- **Below** = Threshold 1
- **Between** = Threshold 1 and 2
- **Between** = Threshold 2 and 3
- **Above** = Threshold 3

This allows an organization to define performance levels, for example:

- Less than 70% = Critical
- 70% to 90% = Needs Attention
- 90% to 100% = On Target
- Above 100% = Exceeded Target



📌 Target Details Section

The **Target Details** section displays detailed Target information.

It includes three main values:

- **Target:** The target value
- **Achieved:** The achieved value
- **Remaining:** The remaining amount needed to reach the Target

A **Progress Bar** also displays the level of Target Completion.

This section is particularly useful for managers who want to know: “**How much of the target have we achieved, and how much is remaining?**”

Sales Trend Section

The **Sales Trend** section is designed to analyze sales trends. It allows users to compare the **Current Year** with the **Previous Year**.

✨ Viewing Modes

- **Monthly:** Displays sales on a monthly/periodic basis.
- **Cumulative:** Displays the cumulative sales trend.

This feature is particularly useful for analyzing sales behavior throughout the year.

⚙️ Sales Trend Settings

The report manager can control the following settings:

- **Current Year Color:** Color of the current-year line
- **Previous Year Color:** Color of the previous-year line
- **Show Area:** Show or hide the area beneath the chart
- **Show Markers:** Display data points on the chart
- **Manual Target:** Define a manual Target
- **Show Target Line:** Display the Target line
- **Target Line Color:** Color of the Target line
- **Target Line Opacity:** Opacity of the Target line
- **Show Values on Bars:** Display values on the chart
- **Bar Value Font Size:** Font size of the displayed values
- **Custom Section Style:** Enable a custom style for the section
- **Section Background:** Background color of the section
- **Section Text Color:** Text color
- **Section Font Size:** Font size



Manager Performance Section

The **Manager Performance** section is one of the most important components of **Smart Team Performance Pro**. In this section, Managers are ranked based on their sales performance.

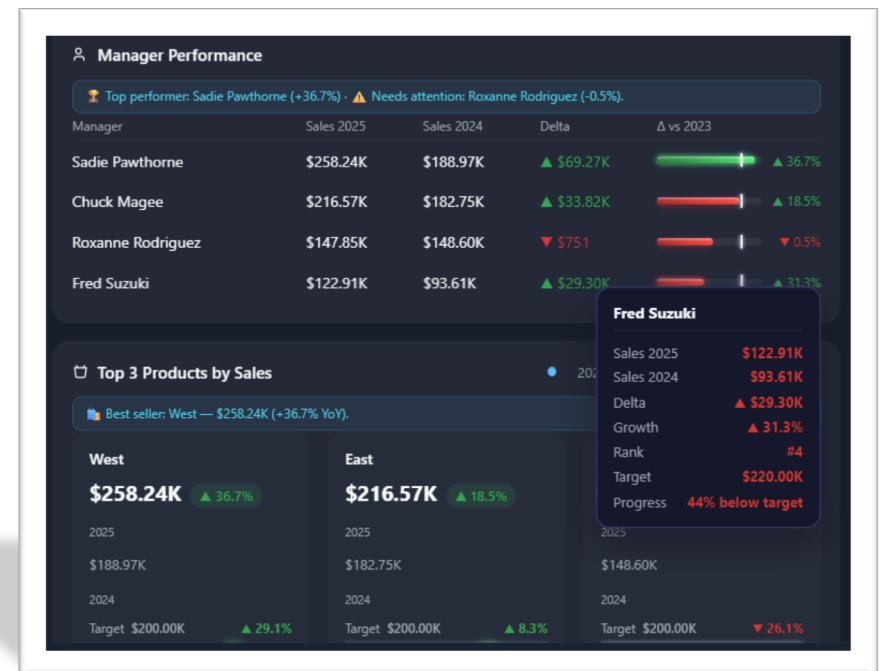
The main information for each Manager includes:

- **Manager Name**
- **Current Sales**
- **Previous Sales**
- **Delta**
- **Growth %**
- **Rank**
- **Target**
- **Progress**

What Makes Manager Performance Valuable for an Organization?

Managers can quickly identify:

- Who generated the highest sales?
- Who has grown compared to the previous year?
- Who has experienced a decline?
- What is each Manager's rank?
- Who has achieved their Target?
- Who is behind their Target?
- How far is each individual from their Target?



Top N Manager Section

The report manager can determine how many Managers should be displayed.

For example:

- **Top 5**
- **Top 10**
- **Top 20**, and so on.

If there are more Managers, the **View All Managers** option is available to display the complete list of Managers.

Manager Bar Styles Section

Five different Bar styles are available for displaying Manager performance:

Neumorphic 3D

A three-dimensional design with a Neumorphic appearance.

Aurora Shimmer

A Gradient design with a Shimmer effect.

Diamond Cut

A Bar design featuring a Striped / Diamond pattern.

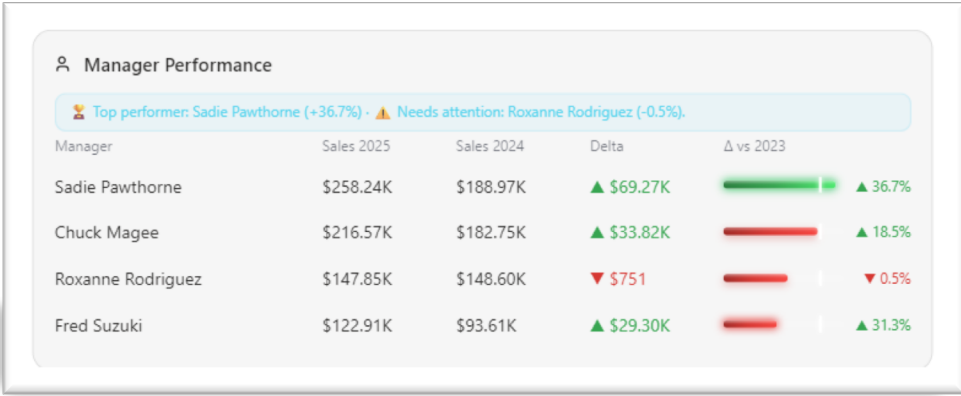
Glass Pill

A glass-like design with Rounded edges.

Neon Pulse

A design featuring Glow and Neon effects.

This feature allows the Visual to adapt to and integrate with different organizational **Design Systems**.



The screenshot shows a 'Manager Performance' report with a table of sales data and a summary bar at the top. The summary bar highlights the top performer, Sadie Pawthorne, with a green bar and the bottom performer, Roxanne Rodriguez, with a red bar. The table lists sales for 2025 and 2024, along with the delta and percentage change from 2023.

Manager	Sales 2025	Sales 2024	Delta	Δ vs 2023
Sadie Pawthorne	\$258.24K	\$188.97K	▲ \$69.27K	▲ 36.7%
Chuck Magee	\$216.57K	\$182.75K	▲ \$33.82K	▲ 18.5%
Roxanne Rodriguez	\$147.85K	\$148.60K	▼ \$751	▼ 0.5%
Fred Suzuki	\$122.91K	\$93.61K	▲ \$29.30K	▲ 31.3%

Manager Color Modes Section

Three main color modes are available for displaying Manager performance.

- **Color:** All Bars are displayed using a single color.
- **Color (+/-):** Positive and negative performance are displayed using different colors.
- **Color Scale:** Performance is displayed using a three-color scale:

Negative → Mid → Positive

The colors for each mode can also be customized.



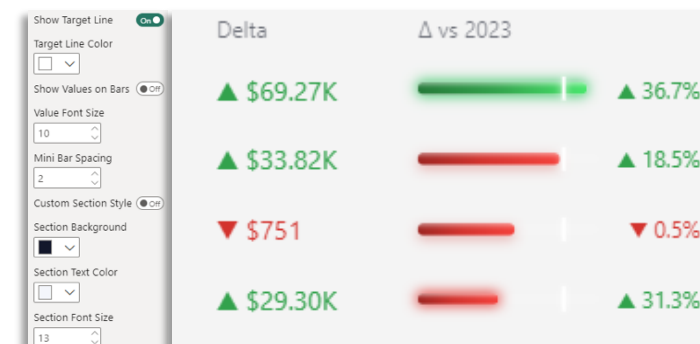
Manager Target Section

The Manager Target can be provided in several ways.

- ✦ **Method 1 - Data Model** — Use the **Manager Target** field.
- ✦ **Method 2 - Manual Target** — Define a manual Target from the **Format Pane**.
- ✦ **Method 3 - Per-Manager Target** — Define a separate Target for each Manager.

For example:

- **Manager A:** 60,000
- **Manager B:** 50,000
- **Manager C:** 75,000



This feature is useful for organizations where individual **Targets** are not the same for all Managers.

Manager Target Line Section

When the **Target Line** is enabled, the Target is displayed directly on the **Performance Bar**.

Available settings:

- **Show Target Line**
- **Target Line Color**
- **Target Line Opacity**

This allows users to visually compare:

Actual Sales vs. Target

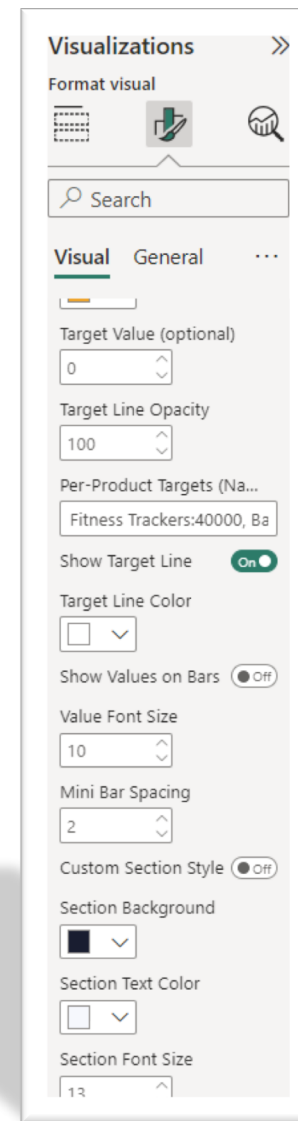
Manager Values Section

Users can enable or disable the display of sales values on the Bar.

Option: Show Values on Bars

The size of the displayed values can also be controlled using:

Bar Value Font Size



✨ Min / Max Highlight Section

This feature is useful for identifying **Extremum** points.

Users can enable the **Enable** option.

They can then define:

- **Lowest Value Color:** Color used to highlight the lowest performance
- **Highest Value Color:** Color used to highlight the highest performance

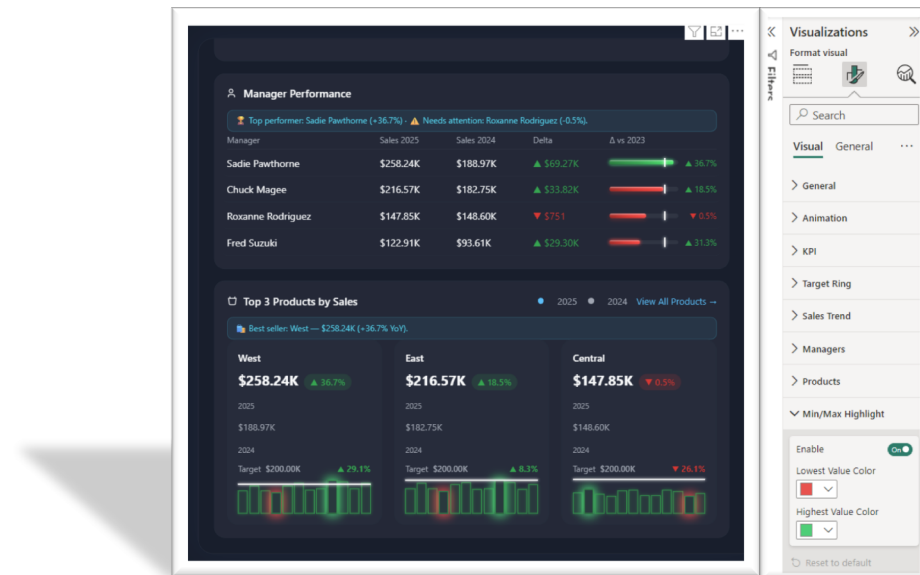
This feature helps managers quickly identify the **best and weakest performance** without having to review each individual record.

📦 Top Products Section

The **Top Products** section displays product performance.

The main information includes:

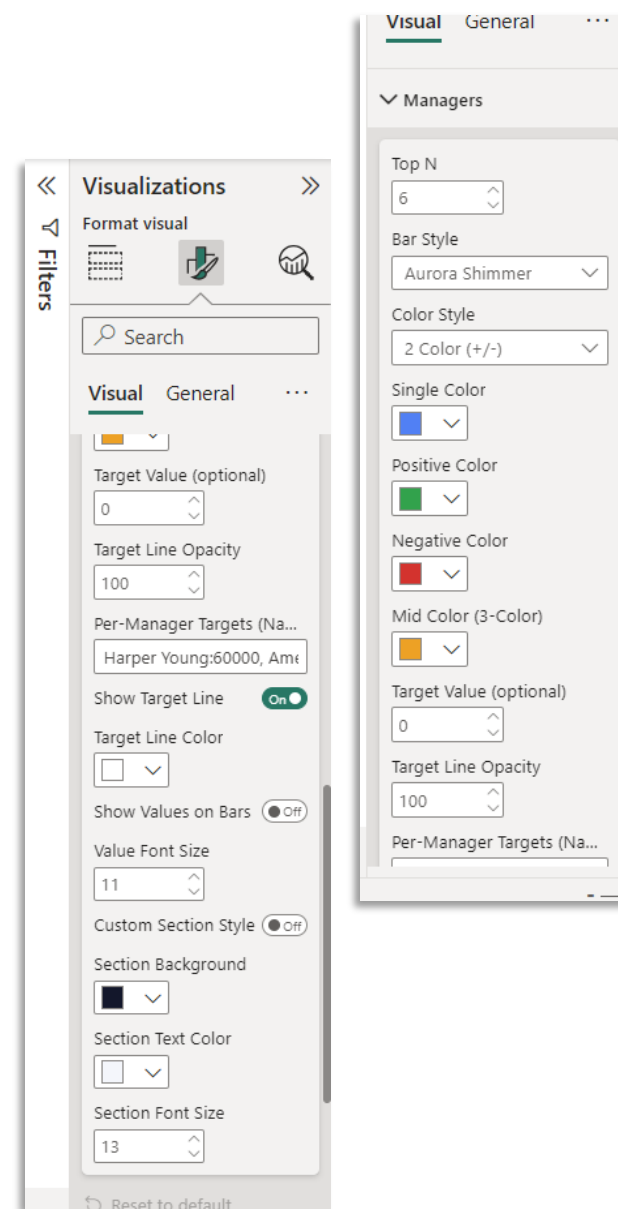
- **Product Name**
- **Current Sales**
- **Previous Sales**
- **YoY %**
- **Rank**
- **Target**
- **Progress**



If monthly data is available, a **Mini Bar Chart** is also displayed for each product.

Product Settings Section

- **Top N:** Number of top-performing products to display.
- **Show YoY:** Show or hide the YoY percentage.
- **Show Target:** Display the Target.
- **Mini Bar Style:** Five styles are available for the Mini Bar:
 - Neumorphic 3D
 - Aurora Shimmer
 - Glass Pill
 - Neon Pulse
 - Ghost Outline
- **Color Style:** Three color modes are available:
 - Color
 - Color (+/-)
 - Color Scale
- **Manual Target:** Define a manual Target.
- **Per-Product Targets:** Define a separate Target for each product.
- **Show Target Line:** Display the Target Line.
- **Target Line Color:** Set the color of the Target Line.
- **Target Line Opacity:** Set the opacity of the Target Line.
- **Show Values on Bars:** Display values on the Bar.
- **Bar Value Font Size:** Set the font size of the displayed values.
- **Mini Bar Spacing:** Control the spacing between Mini Bars.



💡 Smart Insights Section

Smart Insights is one of the analytical features of the Visual.

This section analyzes performance data and provides the user with a concise **Insight**.

Its purpose is to ensure that users do not just see numbers, but can also quickly understand the overall **Performance** status.

Smart Insights can be used across different sections of the Visual, such as **Manager** and **Product** performance. The **Accent Color** of the Insight can also be customized.

💬 Tooltip Section

Smart Team Performance Pro includes an interactive and customizable **Tooltip**.

When users hover over different areas of the Visual, the Tooltip displays additional information.

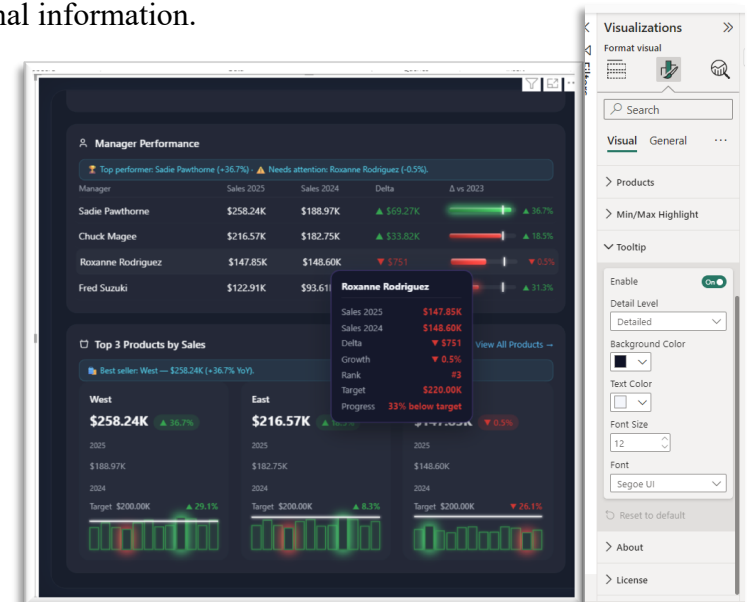
👤 Manager Tooltip Section

The Manager Tooltip displays the following information:

- **Manager Name:** Name of the Manager
- **Sales Current Year:** Current-year sales
- **Sales Previous Year:** Previous-year sales
- **Delta:** Difference in sales
- **Growth:** Percentage of growth or decline
- **Rank:** Manager's rank

If a Target is available:

- **Target:** Manager-specific Target
- **Progress:** The extent to which performance is above or below the Target



Product Tooltip Section

The **Product Tooltip** includes:

- **Product Name**
- **Current Year Sales**
- **Previous Year Sales**
- **YoY**
- **Rank**

If a Target is available:

- **Target**
- **Progress**

17 Monthly Product Tooltip Section

If monthly data is available for a Product, the **Monthly Tooltip** can include:

- **Current Year**
- **Previous Year**
- **Previous vs. Month**
- **Month vs. Target**

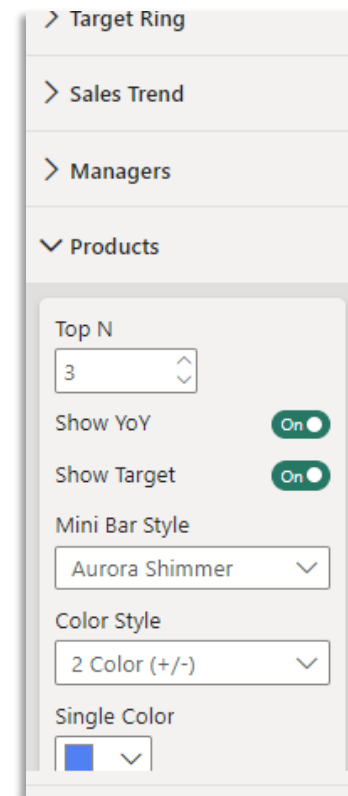
This allows users to hover over a **Mini Bar** and review the performance of a specific month.

Sales Trend Tooltip Section

The **Sales Trend Tooltip** displays information for the selected data point:

- **Current Year Sales**
- **Previous Year Sales**
- **Delta**
- **YoY**

This allows users to view the exact value of each data point without having to estimate it from the chart.



The screenshot shows a configuration panel for the Product Tooltip. It includes sections for 'Target Ring', 'Sales Trend', 'Managers', and 'Products'. Under the 'Products' section, there are settings for 'Top N' (set to 3), 'Show YoY' (On), 'Show Target' (On), 'Mini Bar Style' (Aurora Shimmer), 'Color Style' (2 Color (+/-)), and 'Single Color' (Blue).

🔧 Tooltip Modes Section

Users can specify the level of information displayed in the **Tooltip**.

- **Basic:** Displays a summary of the information.
- **Detailed:** Displays more comprehensive details.

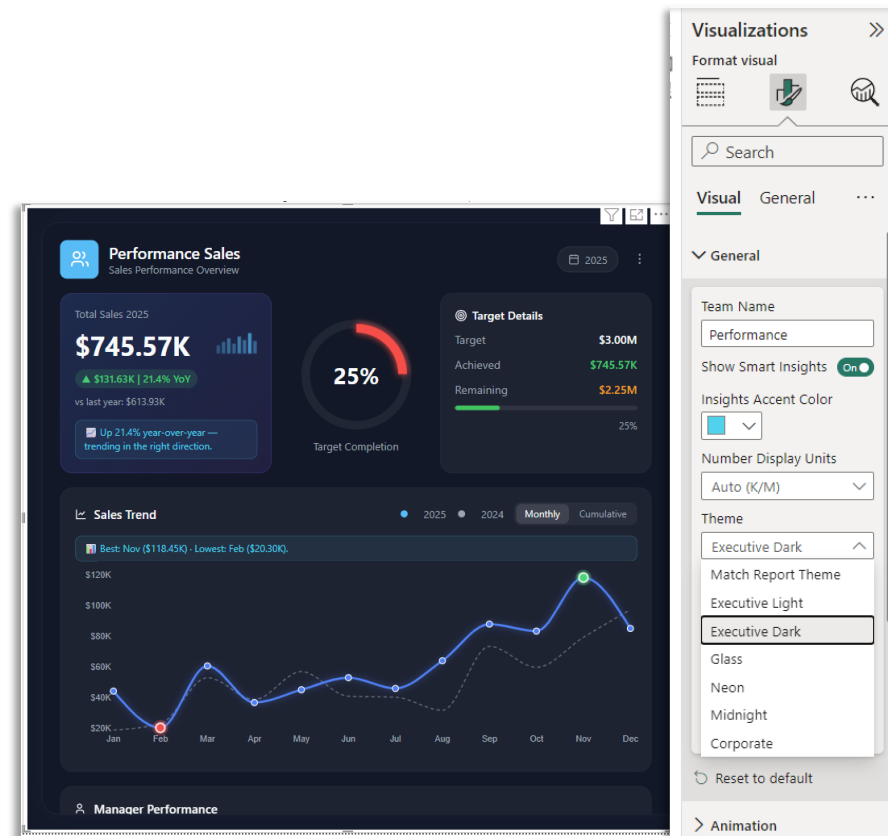
The Tooltip also includes the following settings:

- **Enable / Disable**
- **Background Color**
- **Text Color**
- **Font Size**
- **Font Family**

🎭 Theme Section

Smart Team Performance Pro supports multiple **Themes**.

- **Auto:** Automatically matches the **Power BI** report theme.
- **Executive Light:** Suitable for light executive dashboards.
- **Executive Dark:** Suitable for dark **Executive** dashboards.
- **Glass:** **Glassmorphism** design.
- **Neon:** Modern design with **Neon** effects.
- **Midnight:** Dark executive theme.
- **Corporate:** Formal and professional corporate theme.



General Formatting Section

The following settings can be customized under **General**:

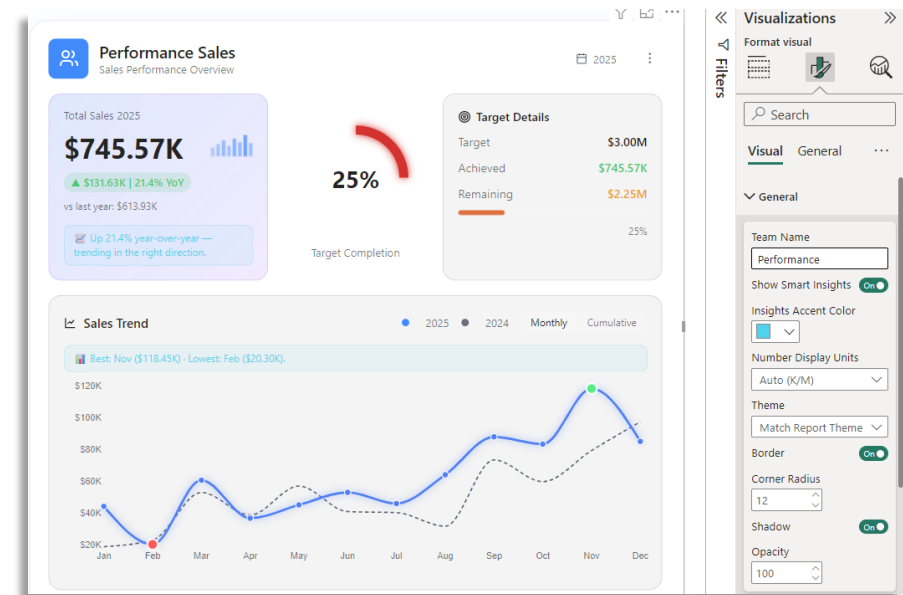
- **Team Name:** Name of the team
- **Show Smart Insights:** Enable or disable **Smart Insights**
- **Insights Accent Color:** Accent color used for the **Insight**
- **Number Display Units:** Controls how numbers are displayed:
 - **Auto (K/M)**
 - **Thousands (K)**
 - **Millions (M)**
 - **None**

Overall Visual Design Section

Users can also control the overall appearance of the **Visual**.

- **Background:** Background color
- **Border:** Enable or disable the **Border**
- **Corner Radius:** Controls the roundness of the corners
- **Shadow:** Enable or disable the **Shadow**
- **Opacity:** Overall transparency

These options allow the **Visual** to be customized and aligned with the organization's overall report design.



✦ Animation Section

The Visual includes a built-in **Animation** system. Users can enable or disable Animation as needed.

• Animation Styles

- **Smooth**
- **Dynamic**
- **Elastic**
- **Cinematic**
- **Instant**
- **Speed:** Controls the Animation speed.
- **Delay:** Controls the delay before the Animation starts.
- **Replay on Filter:** Controls whether the Animation should replay when a Filter is applied.

🔗 Interaction with Power BI Section

Smart Team Performance Pro is not merely a display-only Visual.

Users can click on a **Manager** or **Product** to apply the corresponding Selection in **Power BI**.

This functionality allows selecting a Manager to affect other Visuals in the report.

For example:

Select a Manager



Other Visuals are filtered



Analyze the sales, products, and performance trends for that Manager

This makes the Visual highly suitable for interactive organizational dashboards.

Sample Scenario for a Sales Department

Suppose a company has:

- 5 Sales Teams
- 30 Managers / Sales Representatives
- 200 Products
- Annual Target
- Sales data for the past two years

By loading this data into **Smart Team Performance Pro**, managers can view the following information on a single page:

✨ Overall Status

- **Current Sales:** 8.2M
- **Previous Sales:** 7.5M
- **YoY:** +9.3%
- **Target Completion:** 91%

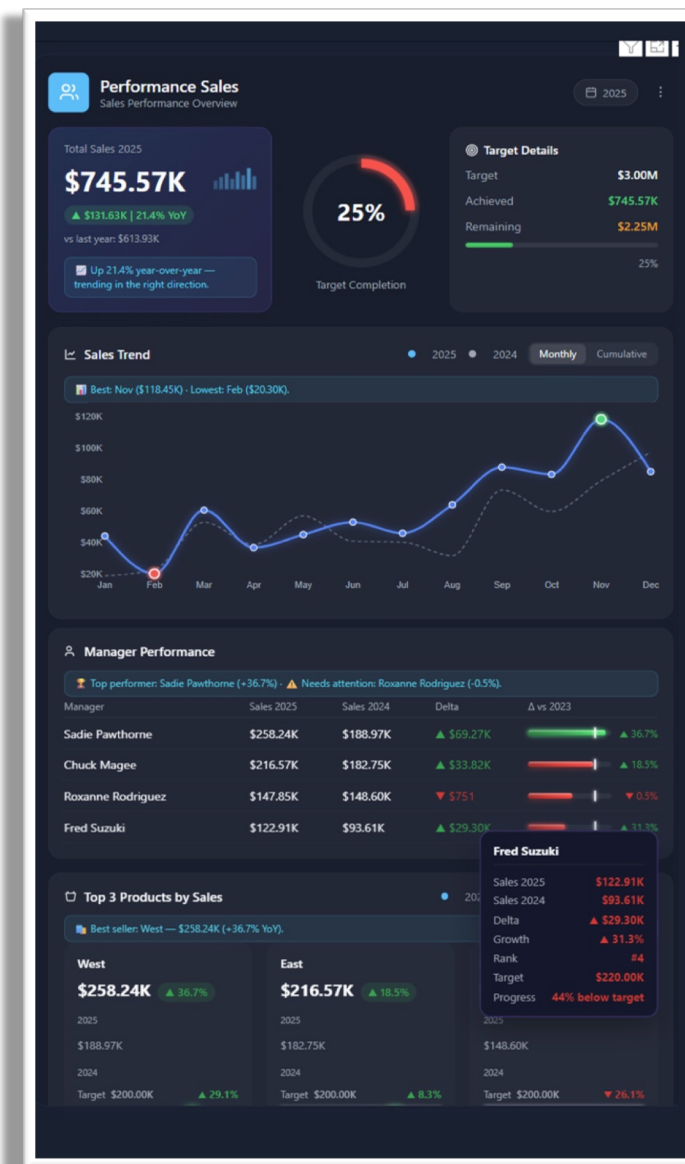
They can then review the **Manager Performance** section to see:

- **Manager A — Rank #1**
- **Manager B — Rank #2**
- **Manager C — Rank #3**

The dashboard also shows which Managers have achieved their **Target** and which are behind their Target.

In the **Top Products** section, managers can identify which products generated the highest sales.

The **Sales Trend** section also provides a comparison between the current-year and previous-year sales trends.



Which Organizational Departments Can Use the Visual?

- **Sales:** Analysis of sales, Managers, Regions, and Targets
- **Business Intelligence:** Building **Executive Dashboards** and **Performance Dashboards**
- **Management:** Quickly reviewing overall business performance and **KPIs**
- **Sales Management:** Comparing the performance of Sales Representatives and Managers
- **Planning & Performance:** Monitoring Targets and plan achievement
- **Marketing:** Analyzing product performance and sales trends
- **Product Management:** Identifying top- and underperforming products
- **Regional Management:** Using **Region** as the Manager Dimension to compare different regions
- **Branch Management:** Using **Branch** as a performance dimension

Key Benefit for Senior Management

Smart Team Performance Pro is designed to shorten the gap between:

Data → Analysis → Decision

Instead of having to:

Open the **Power BI Report** →

Review multiple pages →

Compare several Charts →

Search for the **Target** →

Compare Managers →

Review Products →

And finally make a decision,

managers can view a significant portion of this information in a **single, centralized Visual**.

Feature Summary

Status	Feature
✓	Manager Ranking
✓	Top N Managers
✓	View All Managers
✓	Manager Target
✓	Per-Manager Target
✓	Product Ranking
✓	Top N Products
✓	Min/Max Highlight
✓	Smart Insights
✓	Interactive Tooltip
✓	Multiple Bar Styles
✓	Multiple Color Modes
✓	Animation
✓	Number Formatting

Status	Feature
✓	Current vs Previous Sales
✓	YoY Analysis
✓	Target Completion
✓	Target Ring
✓	Target Details
✓	Sales Trend
✓	Monthly / Cumulative View
✓	Product Target
✓	Per-Product Target
✓	Target Line
✓	Basic / Detailed Tooltip
✓	Power BI Selection
✓	Multiple Themes
✓	Custom Section Styling



✓ Conclusion

Smart Team Performance Pro is designed for organizations that want to transform **Performance** from a collection of numbers and charts into a clear, interactive, and management-focused view.

The Visual focuses on four key areas:

-  **Performance**
Actual performance of teams, Managers, and Products
-  **Target**
Target achievement and the gap to the Target
-  **Comparison**
Comparison with the previous year, individuals, and products
-  **Insight**
Quickly identifying strengths, weaknesses, and significant changes

As a result, **Smart Team Performance Pro** can be used as a professional component in:

- **Sales Dashboard**
- **Executive Dashboard**
- **Management Dashboard**
- **Performance Dashboard**
- **Business Intelligence Dashboard**
- **Power BI Corporate Reporting**

Smart Team Performance Pro is an analytical and management layer for Power BI that provides organizations with an interactive and customizable experience for monitoring team performance, Managers, Products, Targets, and sales trends—all in a single Visual.