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ONLINE SALES & MARKETING

This Tableau Accelerator allows you to:

- Assess your online sales performance & marketing profitability
- Predict evolution of sales
- Revive your client base (*based on suggested marketing actions*)
- Deep-dive at lowest level of detail: Client, Business Line, Product
- Determine Client Lifetime Value & Churn Rate
- Audit improvements of your marketing profitability

Monitor and improve KPIs

Sales

- **Total Revenues:** Total Sales amount (expressed in currency)
- **Total Sales Quantity:** Number of units sold (expressed in units or equivalent units)
- **Average Selling Price:** Average price at which a particular Product is sold (expressed in currency)

Sales Profitability

- **Total Margin:** Amount of profit generated from the sales (expressed in currency)
- **Margin %:** Share of profit generated from the sales (expressed in %)
- **Total Sales Costs:** All the direct and indirect cost amounts it takes to create/purchase a Product and sell it on the market

(expressed in currency)

- **Sales Costs %:** Share of all the direct and indirect cost amounts it takes to create/purchase a Product and sell it on the market

(expressed in %)

Marketing

- **Total Marketing Costs:** Total marketing costs incurred (expressed in currency)
- **Marketing Profitability %:** Profitability of Marketing investments (expressed in %)

Clients

- **Nb Active Clients:** Number of distinct Clients having a sales transaction over the period
- **Nb New Clients:** Number of distinct new Clients acquired (first sales transaction over the period)
- **Revenues per Client:** Average sales amount by Client (expressed in currency)
- **Client Lifetime Value:** Total amount of money a customer is expected to spend with your business, or on your products, during the lifetime of an average business relationship (this measure can be measured in revenues \$ or margin \$)
- **Churn Rate:** Share of lost customers from one year to another

Answer key business questions

- What are our revenues, and which products generate the most revenue?
- What is the performance of our marketing investments?
- What are our top marketing sources?
- How many active customers do we have? What about our ability to acquire new customers?
- Who are our top customers? What is our level of profitability with them?
- What does our customer base look like?
- What is our Client Lifetime Value? What is our Client Churn rate?

Required attributes

- **Date** (*date*): When the sales happened
- **Client** (*string*): Name/Identifier of the Client
- **Client Registration Date** (*date*): When the client registered / When the marketing costs took place
- **Product** (*string*): The item which is actually sold: product, service...
- **Business Line** (*string*): The way you regroup your items: business line, product category, product line...
- **Marketing Source** (*string*): Marketing Source
- **Revenues** (*numeric*): Sales Revenues amount
- **Margin** (*numeric*): Sales Margin amount
- **Quantity** (*numeric*): Number of units sold
- **Marketing Costs** (*numeric*): Marketing Costs

This dataset is typically built by appending two data sets:

Dataset 1: Sales Transactions

- **Date** (*date*): When the sales happened
- **Client** (*string*): Name/Identifier of the Client
- **Client Registration Date** (*date*): When the client registered
- **Product** (*string*): The item which is actually sold: product, service...
- **Business Line** (*string*): The way you regroup your items: business line, product category, product line...
- **Marketing Source** (*string*): Marketing Source
- **Revenues** (*numeric*): Sales Revenues amount
- **Margin** (*numeric*): Sales Margin amount
- **Quantity** (*numeric*): Number of units sold

Data 2: Marketing Costs

- **Client Registration Date** (*date*) ← When the marketing costs took place (*you map [marketing cost date] and [client registration date] on the same attribute of the consolidated data file*)
- **Marketing Source** (*string*): Marketing Source
- **Marketing Costs** (*numeric*): Marketing Costs