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SALES AND MARGIN

This Tableau Accelerator allows you to:

- Assess & Improve your sales performance and profitability
- Predict evolution of sales
- Revive your customer base (*based on suggested marketing actions*)
- Deep-dive at the lowest level of detail: Customer, Business Line, Product
- Determine Customer Lifetime Value & Churn Rate
- Explain Price/Volume/Mix effect

Answer key business questions

- What are our sales results? What is our profitability?
- Which Business lines generate the most sales?
- Who are our top customers? What is our level of profitability with them?
- How many active customers do we have? What about our ability to acquire new customers?
- How is our customer base segmented? What are the recommended marketing actions to address each customer segment?
- What is our Client Lifetime Value?
- What is our Client Churn Rate?

Monitor and improve KPIs

Sales

- **Total Sales:** 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)

Profitability

- **Total Sales Margin:** Amount of profit generated from the sales (expressed in currency)
- **Sales 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 %)

Customers

- **Active Customers #:** Number of distinct Customers having a sales transaction over the period
- **New Customers #:** Number of distinct new Customers acquired (first sales transaction over the period)
- **Sales per Customer:** Average sales amount by Customer (expressed in currency)
- **Customer 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 \$)
- **Customer Churn Rate:** Share of lost customers from one year to another

Required attributes

- **Date** (*date*): Sales date
- **Customer** (*string*): Customer name
- **Product** (*string*): The item which is actually sold: product, service...
- **Business Line** (*string*): The way you regroup items: product line, business line, product category...
- **Sales Amount** (*numeric*): Sales amount
- **Sales Margin** (*numeric*): Sales Margin amount
- **Sales Quantity** (*numeric*): Number of units sold