

Marketing Heatmap Tool - User Guide

Quick Start (No Setup Required!)

1. **Save the Tool:** Save the HTML file to your computer
2. **Open in Browser:** Double-click the file to open it in Chrome, Firefox, Safari, or Edge
3. **Upload Your Data:** Drag and drop your CSV file or click to browse
4. **Configure:** Select your data fields from the dropdowns
5. **Export:** Download as PNG for PowerPoint or as an interactive HTML file

Features for Marketing Professionals

Designed for You

- **No coding required** - Everything works through simple dropdowns and buttons
- **Runs in your browser** - No software to install or IT tickets to submit
- **Your data stays private** - All processing happens on your computer
- **Professional output** - Export presentation-ready charts at 300 DPI

What You Can Visualize

- **Campaign Performance:** Compare partners across multiple metrics
- **Geographic Analysis:** Regions vs. performance indicators
- **Time-based Trends:** Months/quarters vs. KPIs
- **Product Comparisons:** Products vs. customer segments
- **Channel Analysis:** Marketing channels vs. conversion metrics

Step-by-Step Instructions

1. Prepare Your Data

Your CSV file should have:

- **Column headers** in the first row
- **At least 3 columns:** One for rows, one for columns, one for values

Example data structure:

Partner,Region,Performance Score

Partner A,North,85

Partner B,South,72

Partner C,North,91

2. Upload Your File

- **Drag & Drop:** Simply drag your CSV file onto the upload area
- **Click to Browse:** Or click the upload area to select your file
- The tool will show a success message with the number of rows loaded

3. Configure Your Heatmap

Select Your Data Fields:

- **X-Axis (Columns):** What appears across the top (e.g., Regions, Time Periods)
- **Y-Axis (Rows):** What appears down the side (e.g., Partners, Products)
- **Heatmap Values:** The numbers that determine the colors (e.g., Performance Score, ROI)

Customize Appearance:

- **Chart Title:** Give your heatmap a descriptive title
- **Color Scheme:** Choose from 6 professional color palettes
 - Red-Yellow-Green: Best for performance metrics
 - Blues: Professional corporate look
 - Others: Scientific or high-contrast options

Set Thresholds:

- **Low Threshold:** Below this = poor performance (first color)
- **High Threshold:** Above this = good performance (third color)
- Values in between show as the middle color

4. Export Your Heatmap

- **Update Heatmap:** Apply your changes and preview
- **Download as PNG:** Creates a 300 DPI image perfect for PowerPoint
- **Export Embed:** Creates a standalone HTML file you can share

Understanding the Color Settings

Three-Color System

Instead of a gradient, the tool uses three distinct colors:

1. **First Color** (e.g., Red): Poor performance
2. **Middle Color** (e.g., Yellow): Average performance
3. **Third Color** (e.g., Green): Good performance

Thresholds Explained

- If you set thresholds at 0.3 and 0.7:
 - 0.0 - 0.3 = First color (poor)
 - 0.3 - 0.7 = Middle color (average)
 - 0.7 - 1.0 = Third color (good)

Normalization

- **Checked** (Recommended): Scales all values to 0-1 for fair comparison
- **Unchecked**: Uses raw values from your data

Tips for Great Heatmaps

Data Organization

- **Limit categories**: 10-20 items per axis works best
- **Clean data**: Remove blanks and "N/A" values in Excel first
- **Consistent formatting**: Ensure numbers are formatted consistently

Visual Best Practices

- **Title**: Be specific - "Q4 2024 Partner Performance by Region"
- **Color choice**:
 - Use Red-Yellow-Green for metrics where high is good
 - Use Blues for neutral data
 - Consider colorblind-friendly options for public presentations

PowerPoint Integration

1. Click "Download as PNG (300 DPI)"
2. In PowerPoint: Insert → Pictures → From File

3. Resize as needed (high resolution ensures quality)
4. Add annotations with PowerPoint text boxes

Troubleshooting

"No valid data to display"

- Check that your selected columns contain numeric values
- Remove any text (except headers) from value columns
- Ensure no blank rows in your data

Colors look wrong

- Verify your threshold settings make sense for your data
- Try normalizing the data if comparing different scales
- Check if low values should be good (like costs) - you may need to interpret colors differently

File won't upload

- Ensure it's a .CSV file (not .XLSX)
- Save Excel files as "CSV (Comma delimited)"
- Check file isn't open in Excel

Examples by Use Case

Partner Performance Dashboard

- X-Axis: Performance Metrics (CTR, Conversion, ROI)
- Y-Axis: Partner Names
- Values: Normalized scores
- Colors: Red-Yellow-Green

Regional Sales Analysis

- X-Axis: Months or Quarters
- Y-Axis: Regions
- Values: Sales figures
- Colors: Blues (professional)

Campaign Effectiveness Matrix

- X-Axis: Campaign Types
- Y-Axis: Customer Segments
- Values: Conversion rates
- Colors: Viridis (scientific)

Sharing Your Work

For Presentations

- Export as PNG at 300 DPI
- Maintains quality when projected
- Easy to annotate in PowerPoint

For Interactive Review

- Export Embed creates a standalone file
- Recipients can hover for details
- No software needed to view

For Reports

- Screenshot the heatmap in your browser
- Paste directly into Word/Google Docs
- Include threshold explanation in caption

Privacy & Security

- **No data uploaded:** Everything processes in your browser
- **No cookies or tracking:** The tool doesn't store anything
- **Safe for sensitive data:** Your information never leaves your computer

Need Help? This tool is designed to be self-service, but if you encounter issues:

1. Try refreshing the page and uploading again
2. Verify your CSV format matches the examples
3. Test with a smaller subset of data first