To understand the **trajectory of your business**, you want to use the data to confidently answer:

### **1. Who is driving my growth and profitability?**

(PERSONAS & SEGMENTS)

* Which customer groups have the highest LTV?
* Who is converting most efficiently (low CAC)?
* Who buys repeatedly, and who’s dropping off?

### **2. Where is that growth coming from?**

(CHANNELS & TACTICS)

* Which marketing channels are delivering the best ROI?
* What’s scaling cost-effectively (and what’s not)?
* Are we acquiring the *right* customers through the right paths?

### **3. What should I be selling more of, or less of?**

(PRODUCT & PRICING STRATEGY)

* Which products are associated with high-retention, high-margin buyers?
* Are we over-relying on discounts or one-hit SKUs?
* What’s working well together (cross-sell / bundle)?

## **📊 DASHBOARD CUTS TO REQUEST OR REVIEW**

Here’s how to pull insights aligned with those 3 CEO-level questions:

### **🔹 A. To Understand Your Customers (Who?)**

|  |  |
| --- | --- |
| **Cut** | **Why It Matters** |
| Revenue & LTV by customer cohort (1st order date) | Is your base getting more or less valuable over time? |
| Top 10% vs. bottom 10% customers | What traits (channel, products, order size) define your best customers? |
| Churned customers by product/style/channel | Are certain personas not sticking? |
| Repeat purchase rate by geography or persona | Who’s demonstrating loyalty? |

### **🔹 B. To Evaluate Channels (Where?)**

|  |  |
| --- | --- |
| **Cut** | **Why It Matters** |
| CAC, ROAS, and LTV by acquisition channel | Which acquisition methods yield profitable customers? |
| Conversion rates by landing page or creative hook | What messages work for which types of customers? |
| Promo usage vs. non-promo performance | Are we converting with value or brand? |
| Email vs. paid vs. organic cohort analysis | Are we nurturing effectively? Are some channels one-and-done? |

### **🔹 C. To Guide Product Focus (What?)**

|  |  |
| --- | --- |
| **Cut** | **Why It Matters** |
| Product-level LTV (not just margin) | Which SKUs bring back high-value buyers? |
| Attachment rate or bundle behavior | What else are customers buying with top sellers? |
| Product performance by acquisition channel | Do some products bring in better personas via specific channels? |
| Discounts required per product | What SKUs can carry full price vs. rely on promotions? |

## **💡 WHAT I WILL DO WITH THIS DATA**

Once you or your team export 6–8 of these cuts (even in raw CSV or screenshots), I’ll:

1. **Create a Persona × Economics Matrix**
   * Which segments drive 80% of profits vs. which cost more to acquire than they return
   * Identify retention risk, pricing sensitivity, and margin potential by persona
2. **Build a Channel Efficiency Heat Map**
   * Where are dollars working hardest?
   * Where are we overspending for the wrong kind of growth?
3. **Design a Product Strategy Dashboard**
   * Classify products into:  
      🔥 Core Drivers  
      🧪 Test & Learn  
      ❌ Sunset Candidates  
      🎁 Gateway SKUs (low entry/high LTV)
4. **Recommend Strategic Focus Areas**
   * What to double down on (personas/channels/products)
   * What to test, expand, or adjust
   * What to cut or sunset to improve efficiency

## **🧠 HOW YOU SHOULD USE IT**

Once I synthesize this, you’ll be able to confidently:

* Allocate marketing and merchandising dollars toward highest-margin segments
* Align your DTC team around 2–3 hero personas
* Sunset SKUs and promos that look busy but underdeliver
* Reframe your weekly exec dashboards to tie performance to business value

## **📥 Next Step**

Would you like:

* A Google Drive folder structure to drop screenshots or CSVs?
* Me to prioritize the 6–8 most impactful data exports first?
* Or a one-page summary deck format to share with your team as a request for data?

I’ll tailor the format to your next leadership meeting or investor ask.

##### **You said:**

can you help me with all 3?

###### **ChatGPT said:**

Google Drive Folder Structure

Top 8 Dashboard Exports to Prioritize

Executive Summary Deck Outline

You're all set with the following resources:

### **📁 Google Drive Folder Structure**

Organize your team’s raw data and final output into 5 clear folders:

1. **Customer Performance** — LTV, retention, persona insights
2. **Channel & CAC Analysis** — Paid media, email, ROAS
3. **Product & Margin Analysis** — SKU-level sales, margin, attachment
4. **Strategic Summaries** — Slide decks, key takeaways, final charts
5. **Exports for ChatGPT** — Drop screenshots/CSVs here for me to analyze

### **📊 Top 8 Dashboard Exports to Prioritize**

Pull these views first — they’ll give us the strongest signals to define high-ROI personas, winning products, and effective channels.

* Examples: “Top 10% vs. bottom 10% customer summary,” “Promo vs. non-promo CVR,” “Product-level LTV,” etc.

### **🧩 Executive Summary Deck Outline**

When you're ready to synthesize insights, use this slide structure to align your team or investors:

1. **Trajectory** (Growth vs. churn)
2. **Who Wins** (Personas)
3. **Where Wins** (Channel ROI)
4. **What Wins** (Product + Margin mapping)
5. **Strategic Calls** (Double down, test, sunset)
6. **Roadmap** (Where to go next)