

The Dashboard Design

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Markus is not 100% sure about the needs right now, but he does have some ideas of what information he's people would find useful in the dashboard, so here are a few ideas:

- Campaigns Overview - Summary of Key Metrics such as total spend, average spend, total engagements, average engagements, conversions, ROI, etc.
- Channel Performance - The performance for each channel.
- Engagement - Engagement and performance charts by demographic and/or client.
- Trend Analysis - Monthly or Quarterly trends.
- ROI Analysis - Cost per conversion and/or ROI per campaign.

Q/A For Dashboard Design from Markus:

— The most important thing you want in the dashboard?

To have a campaign already, channel performance, engagements, locations demographic

— Do we have any information for the return for the conversions?

Will send later

— Relationship B/T conversions and views and/or likes? Is it something important?

How much does each conversion cost?

— How do they calculate the conversion?

Two types of campaigns, signup, sales

How many people signup during the campaign and how many

Focus on best

— How is the user for, it's for executive, are the people for the campaign,

— analyse what happening for future campaign

- want to know the top executive ? (not useful)
- want to know the best campaign

Identify Key Metrics:

From Markus's ideas, we can derive the following key metrics:

Campaigns Overview: Total spend, average spend, total engagements, average engagements, conversions, ROI

Channel Performance: Spend, engagements, conversions per channel

Engagement: Engagement by demographic/client

"engagements" refers to the interactions and activities that users have with your content.

Views	Likes	Clicks	Conversions
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Engagement = Views+Likes+Clicks+Conversion

Trend Analysis: Monthly or quarterly spending, engagements, conversions trends

ROI Analysis: Cost per conversion, ROI per campaign

ROI= (Total Sales - Expense) / Expense * 100

Design Layout

We can make the mockup diagram of the dashboard on the Lucid chart. Here's a proposed layout:

Header: Title and Filters (Date Range, Campaign, Channel)

Campaigns Overview:

Summary metrics (Total Spend, Average Spend, Total Engagements, Average Engagements, Conversions, ROI)

Visuals: KPIs, bar charts

Channel Performance:

Performance per channel (Spend, Engagements, Conversions)

Visuals: Bar charts, pie charts

Engagement:

Engagement by demographic/client

Visuals: Heatmaps, bar charts

Trend Analysis:

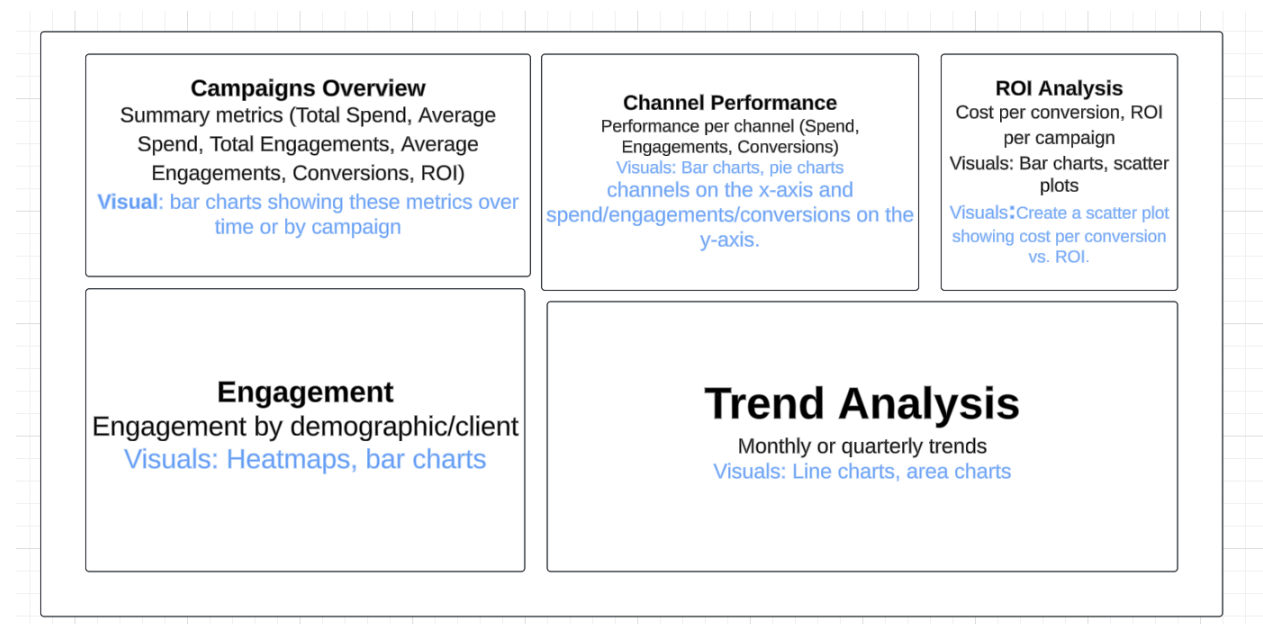
Monthly or quarterly trends

Visuals: Line charts, area charts

ROI Analysis:

Cost per conversion, ROI per campaign

Visuals: Bar charts, scatter plots

Mockup Diagram for Dashboard:**Chart 1: Prepare the Campaign Overview:****Configure the Pivot Table:****Total Spend:**

- In the Pivot table editor, add Campaign to the Rows.
- Add Spend to the Values and ensure it is summarized by SUM.

Average Spend:

- Add Spend to the Values again, and change the summarization to AVERAGE.

Total Engagements:

- Add Engagements to the Values and ensure it is summarized by SUM.

Average Engagements:

- Add Engagements to the Values again, and change the summarization to AVERAGE.

Conversions:

- Add Conversions to the Values and ensure it is summarized by SUM.

ROI:

To calculate ROI, need to add a new column in your original data sheet that calculates the ROI for each row. The formula can be:

$$= (\text{Total Sales} - \text{Expense}) / \text{Expense} * 100$$

After adding this column, include it in your pivot table values.

When dealing with a large number of campaigns (e.g., 1000 campaigns), a pivot chart in Google Sheets can become cluttered and difficult to interpret. To make your visualization more meaningful, you can take the following steps:

1. **Summarize Data:** Instead of visualizing all 1000 campaigns individually, summarize the data to show key insights, such as average values, totals, or top/bottom performers.
2. **Use Filters:** Add filters to allow users to interactively select specific campaigns or groups of campaigns.
3. **Aggregate by Categories:** If your campaigns can be categorized (e.g., by type, region, or time period), aggregate the data by these categories.
4. **Top/Bottom N Analysis:** Focus on the top or bottom N campaigns based on specific metrics like spend, engagements, or ROI.

5. **Interactive Dashboard:** Use slicers or interactive elements to make the dashboard more user-friendly.

Here's how you can adjust your approach to create a more manageable and insightful dashboard in Google Sheets.

Step-by-Step Instructions

1. Aggregate Data by Categories (Month)

Assuming your campaigns can be grouped into meaningful categories, you can create summary metrics by these categories.

Example Data Structure (aggregated by month):

Month	Total Spend	Total Sales	Total Engagements	Average Engagements	Total Conversions	Average ROI
January	50000	120000	15000	500	1000	140%
February	60000	140000	16000	533	1100	133%
...

2. Create a Summary Table

In Google Sheets, create a summary table with aggregated data. You can use functions like [SUMIFS](#), [AVERAGEIFS](#), etc., to calculate these aggregates.

Total Spend:

```
=SUMIFS(SpendRange, DateRange, ">=startDate", DateRange, "<=endDate")
```

Total Sales:

```
=SUMIFS(SalesRange, DateRange, ">=startDate", DateRange, "<=endDate")
```

Total Engagements:

```
=SUMIFS(EngagementsRange, DateRange, ">=startDate", DateRange, "<=endDate")
```

Average Engagements:

```
=AVERAGEIFS(EngagementsRange, DateRange, ">=startDate", DateRange, "<=endDate")
```

Total Conversions:

```
=SUMIFS(ConversionsRange, DateRange, ">=startDate", DateRange, "<=endDate")
```

Average ROI: First, calculate ROI for each row in your data, then:

```
=AVERAGEIFS(ROIRange, DateRange, ">=startDate", DateRange, "<=endDate")
```

3. Insert a Pivot Table

1. Select the summary table range.
2. Go to **Data > Pivot table**.
3. In the Pivot table editor, configure the pivot table as follows:
 - **Rows:** Add the category (e.g., Month).
 - **Values:** Add the metrics (e.g., Total Spend, Total Sales, Total Engagements, Average Engagements, Total Conversions, Average ROI).

Chart Configuration

1. **Chart Type:** Column chart or line chart.
2. **Data Range:** The range of the pivot table.
3. **X-Axis:** Categories (e.g., Months).
4. **Y-Axis:** Metrics (e.g., Total Spend, Total Sales, Total Engagements).

Month	SUM of Total Spend	SUM of Total Sales	SUM of Total Engagements	SUM of Average Engagements	SUM of Total Conversions	SUM of Average ROI
March	1917079.58	2361318.26	4251018	53810.35443	41920	158.4369711
October	2155470.44	3145486.33	5003769	59568.67857	44809	160.0758118
February	2213271.05	2946480.45	4472187	58844.56579	36988	172.1363927
May	2410169.68	3432262.72	5144183	59128.54023	45265	174.8561153
June	2186939.02	2996069.47	5124809	58236.46591	47740	192.202094
September	2298349.44	3014474.72	5386121	63366.12941	46533	196.6988568
November	1820505.91	2874659.06	4299080	55832.20779	38875	317.2716716
January	1841740.87	2921781.35	4362830	57405.65789	39108	322.6317928
April	2076038.2	2930901.53	4990599	54841.74725	42987	404.0100205
August	1946918.66	3519245.29	5308925	60328.69318	46106	477.0364893
December	1960189.66	2742080.95	4518254	57926.33333	34045	542.2330093
July	2066514.95	3584942.63	5708482	62730.57143	45928	679.1884848
Grand Total	24893187.46	36469702.76	58570257	702019.9452	510304	3796.77771

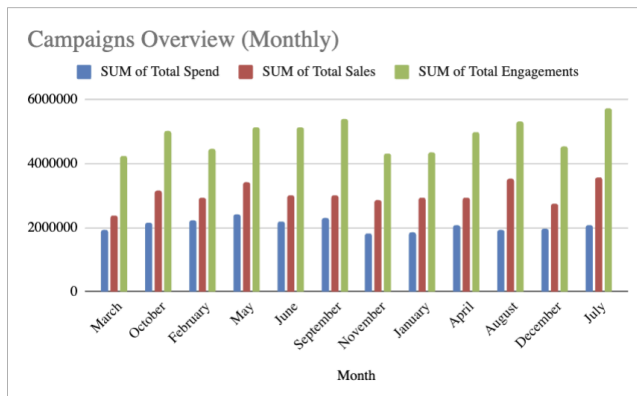


Chart 2: Channel Performance

To visualize channel performance in Google Sheets, including Spend, Engagements, and Conversions,

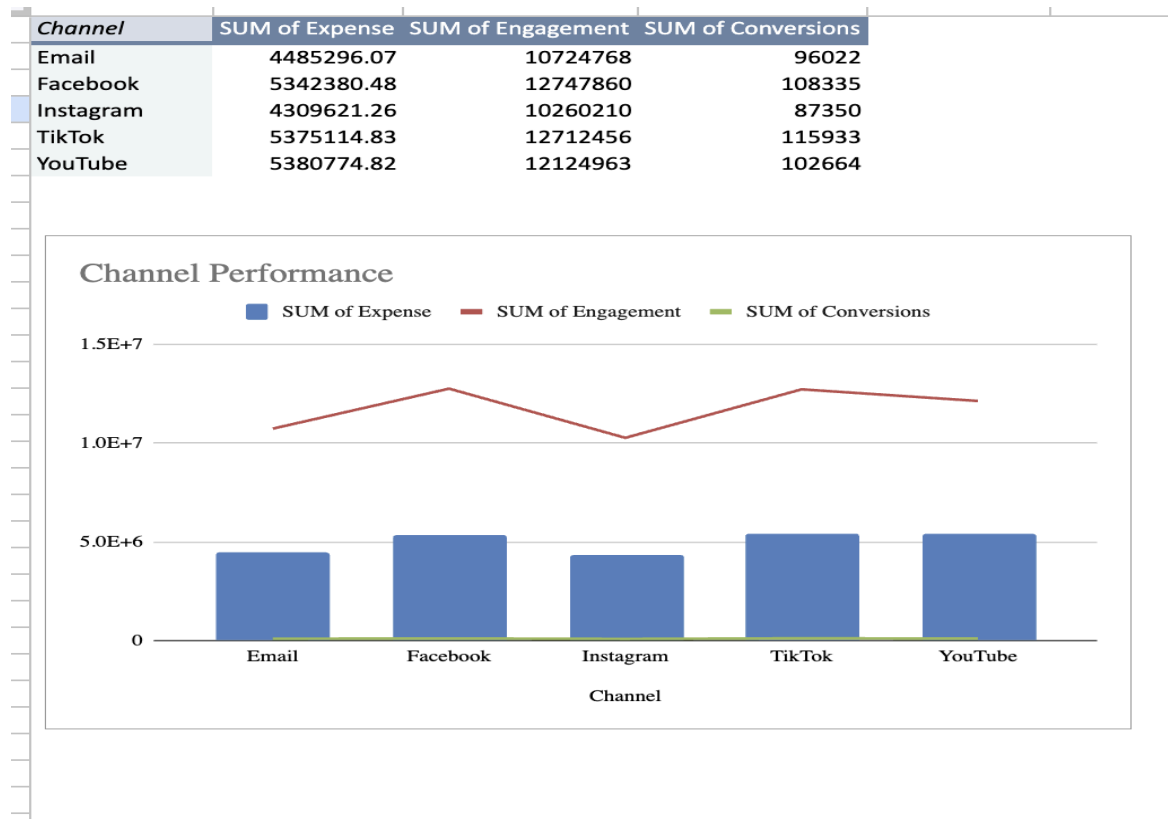
Create a Pivot Table

1. **Select your data range**
2. Go to **Data > Pivot table**.
3. In the Pivot table editor, set up the table as follows:
 - **Rows:** Add **Channel**.
 - **Values:** Add **Spend**, **Engagements**, and **Conversions**. Ensure each field is set to summarize by **SUM**.

3. Insert a Pivot Chart

1. **Select the pivot table.**
2. Go to **Insert > Chart**.
3. In the Chart editor, choose an appropriate chart type. For example, a clustered bar chart or a column chart to compare performance across channels.
4. Customize the chart:

- **Chart Type:** Select a column chart or bar chart.
- **Data Range:** Ensure it covers the pivot table data.
- **X-Axis:** Set to **Channel**.
- **Series:** Add **Spend**, **Engagements**, and **Conversions**.



Channel	SUM of Expense	SUM of Engagement	SUM of Conversions
Email	4485296.07	10724768	96022
Facebook	5342380.48	12747860	108335
Instagram	4309621.26	10260210	87350
TikTok	5375114.83	12712456	115933
YouTube	5380774.82	12124963	102664



Channel Performance

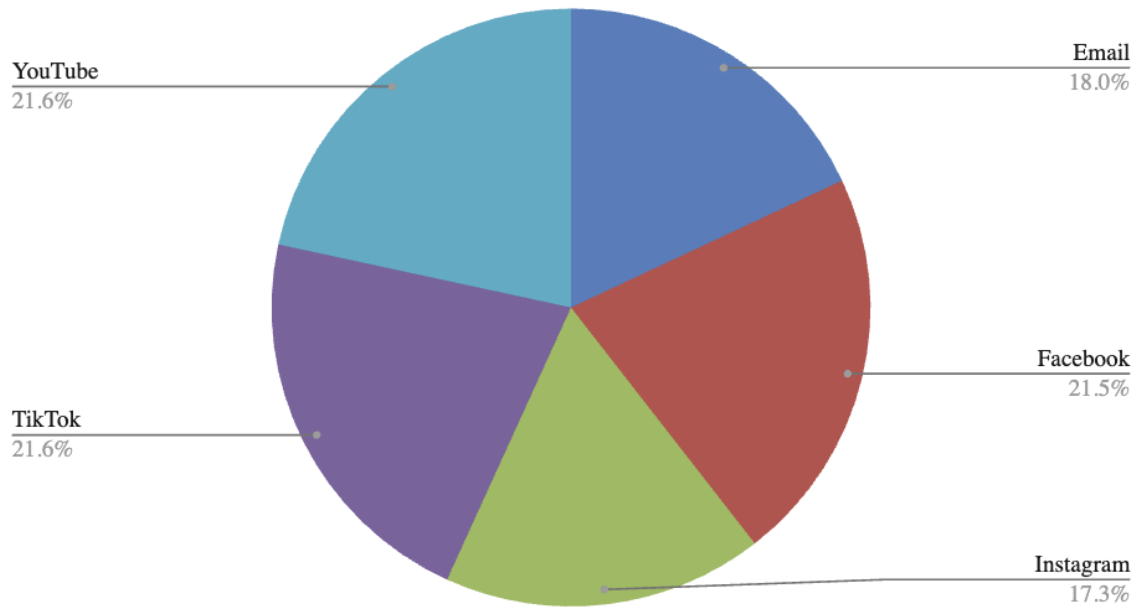


Chart 3: Engagement

To visualize Engagement by demographic (Audience)

Create a Pivot Table

1. Select your data range
2. Go to **Data > Pivot table**.
3. In the Pivot table editor, set up the table as follows:
 - **Rows:** Add **Demographic**.
 - **Values:** Add **Engagements (Audience)** and ensure it is summarized by **SUM**.

visualization clearly shows the engagement by demographic making it easier to analyze and compare performance across different groups.

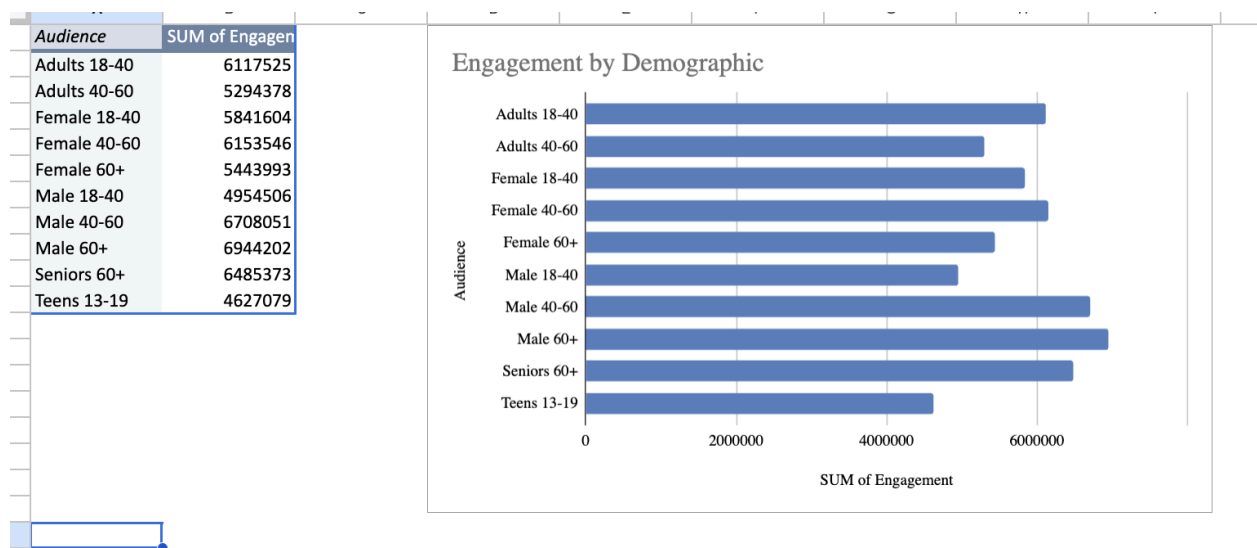


Chart 4: ROI Analysis

Given that you have a large dataset with 1000 clients, the approach to visualizing cost per conversion and ROI per campaign in Google Sheets will need to be a bit more structured. Here's a detailed guide on how to handle this:

Step-by-Step Instructions

1. Prepare Your Data

Make sure your data is structured with necessary columns, and additional columns for calculated fields:

Client	Campaign	Spend	Conversions	Revenue	Cost per Conversion	ROI
Client 1	Campaign A	1000	50	2000		
Client 2	Campaign B	2000	100	4000		
...		
Client 1000	Campaign X	2500	125	5000		

2. Add Calculated Fields

To calculate **Cost per Conversion** and **ROI**, add the following formulas to the respective columns:

- **Cost per Conversion:** $=D2/C2$ (where D is Spend and C is Conversions)
- **ROI:** $=(E2-D2)/D2$ (where E is Revenue and D is Spend)

Apply these formulas for all rows in your dataset.

3. Create a Pivot Table

1. **Select your data range** (including the headers).
2. Go to **Data > Pivot table**.
3. In the Pivot table editor, set up the table as follows:
 - **Rows:** Add **Campaign**.
 - **Values:** Add **Cost per Conversion** and **ROI**, summarizing each by **AVERAGE**.

This will allow you to visualize the average cost per conversion and ROI for each campaign, making it easier to analyze and compare the performance across a large number of clients.

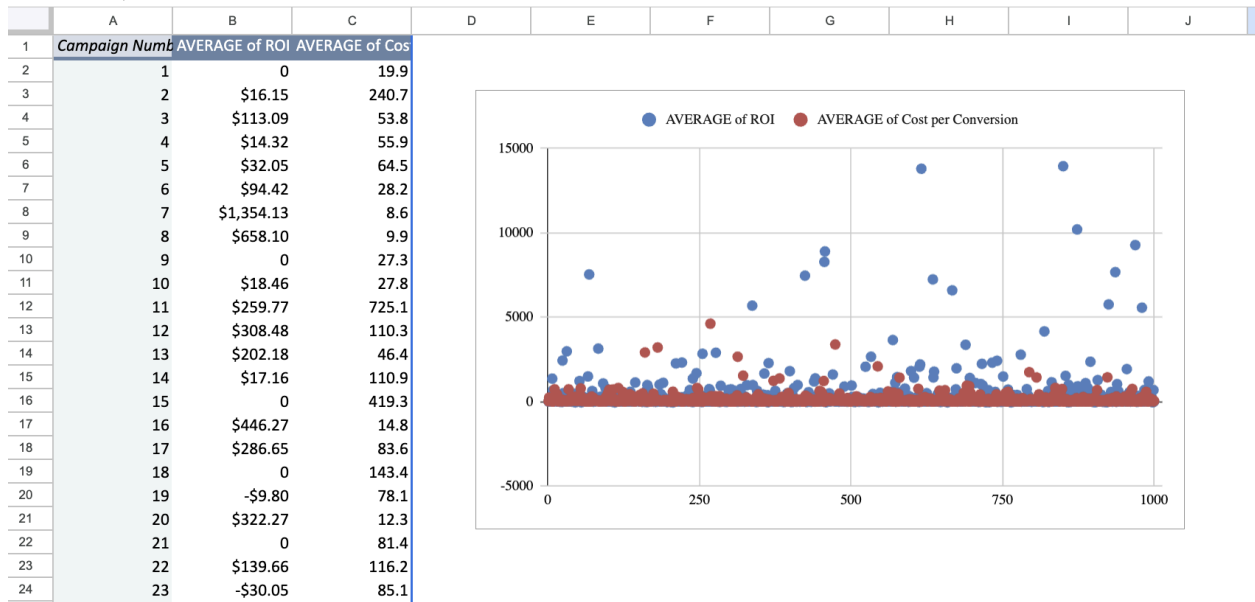
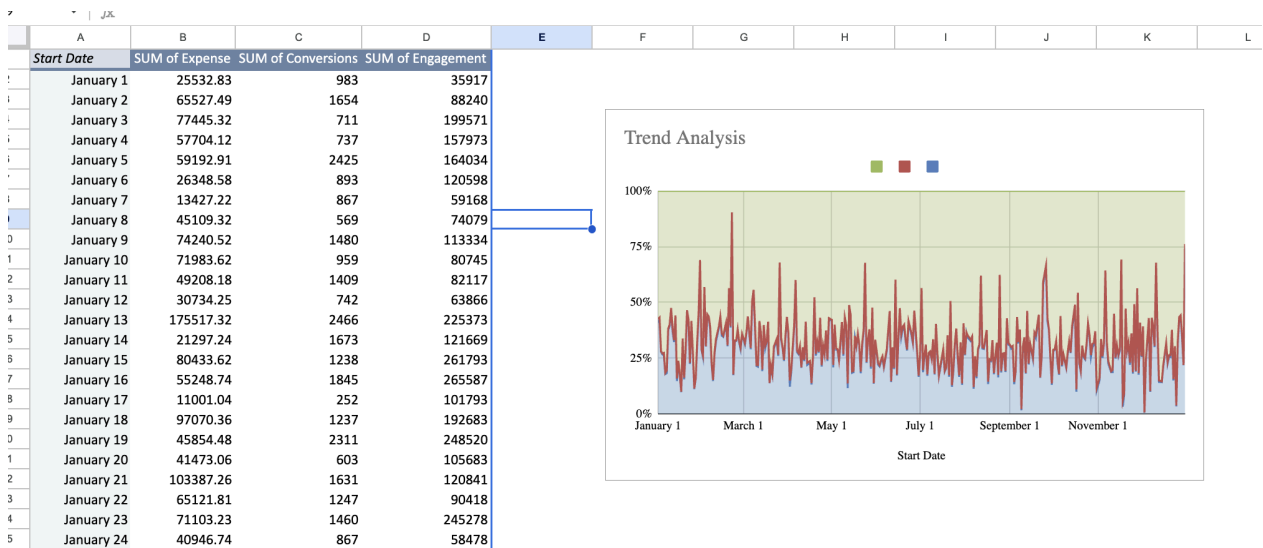


Chart 5: Trend Analysis

In the Pivot table editor, set up the table as follows:

- **Rows:** Add **Month** (or **Quarter**).
- **Values:** Add **Spend**, **Conversions**, and **Engagements**, summarized by **SUM**.



Final Dashboard in Tableau

