Business Intelligence Suite or Executive Dashboard and Reporting System — Sample Report

"Your Data is Your Growth Indicator."

Operational Visibility

- **Smarter Decisions with BI Suite -** This report is a sample preview of our Business Intelligence Suite — a business growth system that transforms raw data into clear dashboards, actionable insights, and ROI-driven recommendations.

Our goal is simple: help businesses track KPIs, discover growth opportunities, and make decisions faster.

- **Interactive Dashboards -** [Here](#)

These dashboards are built in Looker Studio using sample data. They showcase how we track:

- Sales performance & revenue trends
- Marketing ROI & channel effectiveness
- Customer growth & retention
- Financial health & profitability

KPIs - What the Data Reveals

- ✔️**Executive** - To execute the plan .
- 📈 **Sales Growth**: Monthly sales increased 18%, strongest growth in Q2.
- 🎯 **Marketing ROI**: Digital campaigns drove 60% of new customers.
- 💰 **Profitability**: Net margin improved by 5%, driven by cost efficiency.
- 🛍️ **Product Mix**: Top 3 products contributed 45% of revenue.
- 🔄 **Retention**: Repeat customer rate at 32%, showing untapped potential.

KPI Dashboards (6) →

1. Sales Performance (Revenue, AOV, Conversion Rate)
2. Marketing Efficiency (CAC, ROI, Channel ROI)
3. Profitability (Gross Margin, Net Profit)
4. Retention (Retention Rate, Churn, Repeat Sales %)
5. Customer Value (CLV, Pareto 80/20, VIP buyers)
6. Category/Product Performance (Top Categories, ROI by Category)

"what action does this KPI unlock?"

Ans - *KPI: Low ROI in Apparel Ads → Action: Reallocate 15% budget to Accessories → Projected +$60K profit*.

Dashboard Datasets -

Strategy Layer

1. 📊 ROI Analysis Report - Objective

Evaluate category-level marketing ROI to identify where ad spend generates the highest returns and guide budget allocation for the next quarter.

Findings

1. **Accessories**
- Spend: **$10.4K**
- Sales: **~$28K**
- ROI: **≈ 2.7x**
- **Insight:** Strongest category. Customers show high conversion and repeat buys from promotions.
2. **Beauty**
- Spend: **$10K**
- Sales: **~$24K**
- ROI: **≈ 2.4x**
- **Insight:** High-performing category with strong demand elasticity → consistent returns on mid-level spend.
3. **Electronics**
- Spend: **$8.4K**
- Sales: **~$18K**
- ROI: **≈ 2.1x**
- **Insight:** Average performance. Still profitable but shows lower ROI than Accessories & Beauty. May benefit from channel-specific targeting.
4. **Home & Apparel**
- Spend: **~$12K** combined
- ROI: **< 2x**
- **Insight:** Weakest categories. Either messaging, product pricing, or targeting mismatch. Risk of negative ROI if left unchecked.

Business Actions

✅ **Reallocate Spend**

- Move **10–15% budget from Home & Apparel → Accessories & Beauty**.
- Expected uplift: **+$12K to $18K additional quarterly sales** without extra spend.

✅ **Scale Proven Winners**

- Double-down on **Accessories & Beauty campaigns** (higher ROI).

- Consider influencer-led or retargeting ads for Accessories.

✅ Optimize Underperformers

- Audit Home & Apparel campaigns: test pricing, creative, or audience targeting before further cuts.
- Run A/B testing on ad sets.

✅ Monitor Electronics

- Keep spend stable; track ROI for potential scale-up if new targeting improves efficiency.

Executive Summary

- **Current ROI Leader:** Accessories (2.7x)
- **Strong Opportunity:** Beauty (2.4x)
- **Stabilize:** Electronics (2.1x)
- **Optimize or Reduce:** Home & Apparel (<2x)
- **Net Recommendation:** Reallocate ~15% budget to proven categories → project **15–20% uplift in ROI** overall.

2.💰 Cost Optimization Plan

Objective

Reduce wasteful spending and ensure profitability by aligning marketing efficiency, customer acquisition costs (CAC), and category performance.

Insights from Data

1. **Uneven ROI Performance**
- ROI ranges between 1.8x – 2.7x.
- Accessories & Beauty outperform benchmarks.
- Home & Apparel drag down blended ROI, creating budget leakage.
2. **High CAC in Apparel**
- Apparel requires significantly higher ad spend to convert customers.
- CAC exceeds 25–30% of CLV in this segment → unsustainable.
3. **Regional Profit Variability**
- Profit margins vary by geography (visible in dashboards).
- Some regions show negative net margins after logistics + ad costs.

Action Plan

✅ **Cap CAC at 20% of CLV**

- Define a profitability threshold: CAC must not exceed 20% of CLV.
- Example: If CLV = $300, CAC should be ≤ $60.
- Apply this rule across categories to automatically flag overspending.

✅ **Reallocate Spend to High-ROI Categories**

- Prioritize Accessories (ROI 2.7x) and Beauty (ROI 2.4x).
- Reduce exposure in Home & Apparel (<2x ROI) until optimized.

✅ **Introduce Cross-Selling Bundles**

- Bundle Accessories + Beauty in campaigns to lift AOV (average order value).
- Example: "Buy Beauty Kit → Get 20% off Accessories."
- Expected outcome: Improved ROI by leveraging strong categories.

✅ **Test Organic & Low-Cost Channels**

- For Apparel: shift 20–30% spend from paid ads → organic channels (email, influencers, social collabs).
- Use referral programs to offset high CAC.

✅ **Regional Profit Optimization**

- Use dashboards to monitor Profit per Region.

- Reduce or stop marketing in negative-margin regions.
- Double-down in profitable geographies where logistics are efficient.

Projected Business Impact

- Reduce total CAC by 15–20%.
- Improve blended ROI from ~2.1x → 2.5x+ within one quarter.
- Save $30K–$50K annually by eliminating low-margin campaigns.

🚀 Growth Playbook (Step-by-Step Actions) - *Consulting Layer*

Why It Matters

The execution roadmaps that convert insights into measurable growth. This playbook organizes actions by cost level, timeline, and ROI measurability.

Evaluation Framework

- No-Cost Actions → Leverage existing assets (email list, customer data, dashboards).
- Low-Cost Actions → Require small budget shifts, bundling, or tactical campaigns.
- Investment Actions → Require capital allocation (new products, new regions, tech stack).

Each action comes with:

- Timeline: Quick Wins (0–30 days), Mid-Term (1–3 months), Strategic Bets (6–12 months).
- KPI: Metric to track ROI impact.

Growth Actions

No-Cost Actions

✔️ **Re-Engage Inactive Customers**

- Use existing CRM/email tools.
- Send win-back campaigns ("We miss you! Get 10% off if you return this week.")
- Timeline: 0–30 days
- KPI: Reactivation Rate, Revenue per Email

✔️ **Optimize Dashboards for Weekly Reviews**

- Management team reviews KPI dashboards weekly → align decisions with data.
- Timeline: Immediate
- KPI: % of decisions backed by data, reduction in ad waste

Low-Cost Actions

💡 **Bundle High-ROI Categories (Beauty + Accessories)**

- Run "Bundle & Save" campaigns on paid + organic channels.
- Timeline: 30–60 days
- KPI: Average Order Value (AOV), Campaign ROI

💡 **Introduce Referral Program**

- Offer discounts or credits for customer referrals.
- Timeline: 1–2 months
- KPI: CAC reduction, Referral Share of Sales

💡 **Region-Specific Marketing**

- Focus spend on regions with highest profitability (based on dashboard).
- Timeline: 1–3 months
- KPI: Regional Profitability %, CAC by Region

Investment Actions

🔥 **Private Label Expansion in Accessories**

- Accessories show 2.7x ROI → expand into private-label SKUs for margin control.
- Timeline: 6–12 months
- KPI: Gross Margin %, Sales from Private Label

🔥 **Tech Stack Upgrade (CDP/Automation)**

- Invest in Customer Data Platform or advanced automation → better segmentation + personalization.
- Timeline: 6–12 months
- KPI: CAC drop, LTV uplift, Automation Efficiency

🔥 **New Market Expansion**

- Use ROI dashboards to test-entry in high-potential geographies.
- Timeline: 12 months
- KPI: New Market Sales %, ROI per Market

Execution Timeline

📅 **Quick Wins (0–30 days)**

- Re-engage inactive customers
- Weekly dashboard reviews
- Early bundle campaigns

📅 **Mid-Term (1–3 months)**

- Referral program
- Regional optimization
- Cross-selling bundles

📅 **Strategic Bets (6–12 months)**

- Private label expansion
- Tech stack upgrade
- New market entry

CEO-Level Value

- Clarity: Breaks down actions into executable steps.
- ROI Measurable: Each action tied to KPI → ensures accountability.
- Balanced Growth: Mix of Quick Wins + Long-Term Bets keeps momentum.
- Perception Shift: You're not just giving dashboards, you're acting as their growth partner/consultant.

Insights Report → The data and turn it into strategic recommendations.

Case Study → Prove with a story how BI changed business outcomes.

Intelligence Layer

📄 Insights Report → From Data to Recommendations

Objective

Turn raw data into actionable business recommendations that leadership can implement immediately.

Key Insights (from sample dataset)

1. **Category ROI Performance**
- Accessories → ROI 2.7x → strongest growth lever.
- Beauty → ROI 2.4x → high-margin expansion category.
- Electronics → ROI 2.1x → average, can be optimized with targeted spend.
- Home & Apparel → ROI <2x → drag on profitability.

👉 **Recommendation: Reallocate 10–15% of spend from Home/Apparel to Accessories & Beauty.**

1. **Customer Behavior (Retention & CLV)**
- Returning customers spend 35% more per order than new customers.
- 20% of customers drive 65% of revenue → strong Pareto effect.

👉 **Recommendation:**

- Launch a loyalty program to protect top 20%.
- Personalize offers to repeat buyers to increase CLV.
1. **Regional Profitability**
- Region A → contributes 40% sales but thin margin (CAC too high).
- Region B → 25% sales, high margin → underinvested.

👉 **Recommendation:**

- Scale ad spend in Region B.
- Cap CAC in Region A to <20% of CLV.
1. **Channel Efficiency**

- Paid campaigns show 2.2x ROI average, organic/owned channels not fully utilized.

👉 **Recommendation:**

- Shift 15–20% budget into organic (email, referrals, bundles).
- Use dashboards to track CAC by channel weekly.

Executive Summary

Data clearly shows that Accessories + Beauty are immediate ROI drivers, retention & CLV strategy is the next big lever, and regional/channel optimization unlocks efficiency.

📖 Case Study → Business Outcomes from BI

Context (Example: "GlowNest")

GlowNest, a fast-growing D2C brand, was struggling with flat ROI on ad spend, low retention, and inconsistent regional performance. Leadership lacked a single source of truth.

BI Suite Intervention

1. **Dashboards Built**
- ROI Dashboard (by category, region, channel)
- Retention Dashboard (new vs. returning revenue)
- CLV & CAC Dashboard (profitability view)
2. **Insights Delivered**
- Found Accessories ROI = 2.7x vs Apparel ROI = 1.8x.
- Identified Region B was 25% more profitable than Region A.
- Flagged that 20% of customers drove 65% of sales.
3. **Recommendations**
- Reallocate 15% budget to Accessories + Beauty.
- Cap CAC at 20% of CLV.
- Launch loyalty + referral program.
- Weekly management reviews using dashboards.

Business Outcomes (After 90 Days)

- Marketing ROI → grew from 2.0x to 2.5x.
- Customer Retention → increased by +12%.
- Revenue Growth → +18% quarter-on-quarter.
- Profit Margin → improved buyer +6% due to CAC contol.

📘 <u>Data Dictionary</u>

Purpose: Provide clear definitions of the metrics used in dashboards and reports so business teams and executives interpret insights consistently.

Core Business Metrics

1.**ROI (Return on Investment)**

- Definition: Ratio of revenue generated to marketing spend.
- Formula: ROI = (Sales Revenue ÷ Marketing Spend).
- Example (from dataset): Accessories → $28K sales ÷ $10.4K spend = 2.7x ROI.
- Why it matters: Shows efficiency of marketing spend across categories and channels.

1. **CAC (Customer Acquisition Cost)**
- Definition: Average cost of acquiring one new customer.
- Formula: CAC = Total Marketing Spend ÷ Number of New Customers Acquired.
- Example: Apparel → $6K spent → 200 new customers = $30 CAC.
- Why it matters: Helps control profitability — should not exceed 20% of CLV.

2. **CLV (Customer Lifetime Value)**
- Definition: Total revenue expected from a customer over their lifetime.
- Formula: CLV = (Average Order Value × Purchase Frequency × Retention Period).
- Example: Beauty → $60 AOV × 4 purchases/year × 2 years = $480 CLV.
- Why it matters: Determines how much can be spent on acquisition & retention.

3. **Gross Margin**
- Definition: Revenue minus Cost of Goods Sold (COGS), expressed as %.
- Formula: Gross Margin = ((Revenue − COGS) ÷ Revenue) × 100.
- Example: Electronics → $18K revenue − $12K COGS = $6K → 33% margin.
- Why it matters: Measures profitability after production costs, before marketing/admin.

4. **Retention Rate**
- Definition: % of customers who make repeat purchases over a time period.
- Formula: Retention Rate = ((Customers End − New Customers) ÷ Customers Start) × 100.
- Example: Start = 1000, End = 950, New = 200 → (950−200)/1000 = 75% retained.
- Why it matters: Strong retention boosts CLV and lowers CAC dependence.

5. **Churn Rate**
- Definition: % of customers lost in a given period.
- Formula: Churn Rate = 1 − Retention Rate.
- Example: Retention = 75% → Churn = 25%.
- Why it matters: High churn signals weak customer loyalty and poor CLV.

6. **Revenue per Customer (RPC)**
- Definition: Average revenue generated per customer.
- Formula: RPC = Total Revenue ÷ Total Customers.
- Example: $100K revenue ÷ 2,000 customers = $50 RPC.
- Why it matters: Helps compare segments & customer quality.

7. **Profit per Region / Category**

- Definition: Net profit contribution segmented by geography or product line.
- Formula: (Revenue – COGS – Marketing Spend).
- Why it matters: Reveals where to scale and where to cut losses.