ADVANCE SALES ANALYTICS –

– LET’S GET STARTED

Advance Sales Analytics

SCENARIO 1

Find the basket of products any particular customers used to buy

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Advance Sales Analytics

Find the basket of products any particular customers used to buy

Unique products bought = DISTINCTCOUNT(Sales[Product ID])

Customer Name	Total Sales	Unique products bought
Brian Kim	123156	44
Scott Rice	110527	44
Alan Scott	114713	43
Douglas Franklin	131945	42
Steven Owens	103745	42
Carlos Scott	101047	41
Craig Wright	150906	41
Dennis Morris	102707	41
Juan Harvey	125387	41
Daniel Moreno	111200	40
Eugene Weaver	116454	40
Harold Matthews	116866	40
Craig Mills	117550	39
Gregory Porter	95384	39
Michael Ward	107850	39
Ralph Richardson	103911	39
Alan Miller	101315	38
Arthur Roberts	101934	38
David Mendoza	105520	38
Kevin Wood	95583	38
Phillip Harvey	106380	38
Raymond Fields	75618	38
William Andrews	123207	38
Brandon Diaz	142638	37
Daniel Fernandez	109923	37
Total	**58756168**	**101**

Product Name	Customer Name	Total Sales
Product 1	Aaron Carr	4482
Product 1	Aaron Cruz	4482
Product 1	Aaron Miller	2241
Product 1	Adam Hernandez	2241
Product 1	Adam Mccoy	2241
Product 1	Alan Parker	2241
Product 1	Alan Perry	2241
Product 1	Alan Thomas	4482
Product 1	Albert Cunningham	4482
Product 1	Albert Young	4482
Product 1	Andrew Burns	6723
Product 1	Andrew Graham	2241
Product 1	Andrew James	8964
Product 1	Andrew Robinson	8964
Product 1	Anthony Chapman	4482
Product 1	Anthony Parker	11205
Product 1	Antonio Dixon	4482
Product 1	Antonio Frazier	6723
Product 1	Antonio Green	2241
Product 1	Antonio Owens	6723
Product 1	Arthur Welch	11205
Product 1	Benjamin Carpenter	2241
Product 1	Benjamin Moreno	2241
Product 1	Benjamin Ryan	6723
Product 1	Billy Nelson	8964
Total		**58756168**

Month

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Year

- 2016
- 2017
- 2018
- 2019

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SCENARIO 2

Find customers making purchases of the product more than one time?

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Find customers making purchases of the product more than one time?

Total Transactions	Total Customers	Customers w/Multiply Purchases

Advance Sales Analytics

Find customers making purchases of the product more than one time?

Total Transactions | Total Customers | Customers w/Multiply Purchases

```
Total Transactions = COUNTROWS( Sales )
```

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Find customers making purchases of the product more than one time?

Total Transactions	Total Customers	Customers w/Multiply Purchases

```
Total Transactions = COUNTROWS( Sales )
```

```
Total Customers = DISTINCTCOUNT( Sales[Customer ID] )
```

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Advance Sales Analytics

Find customers making purchases of the product more than one time?

Total Transactions | **Total Customers** | **Customers w/Multiply Purchases**

```
Total Transactions = COUNTROWS( Sales )
```

```
Total Customers = DISTINCTCOUNT( Sales[Customer ID] )
```

```
Customers w/Multiply Purchases =
        COUNTROWS( FILTER(
                SUMMARIZE( Sales, 'Customer Data'[Customer ID], "Total
                                Purchases", [Total Transactions] ),
                        [Total Purchases] >= 2 ) )
```

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SCENARIO 3

Find the new customers

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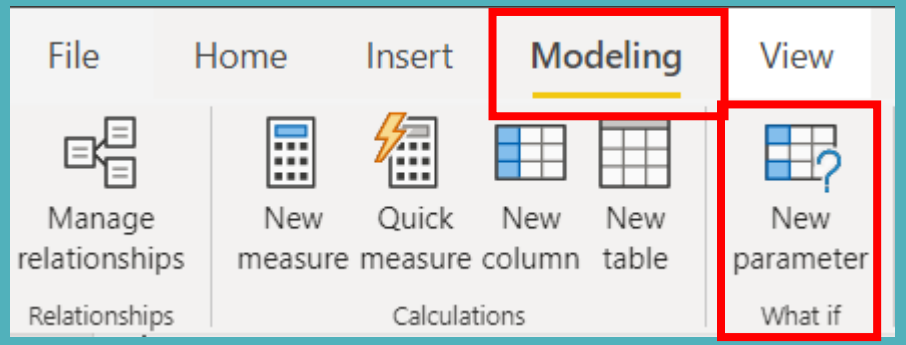
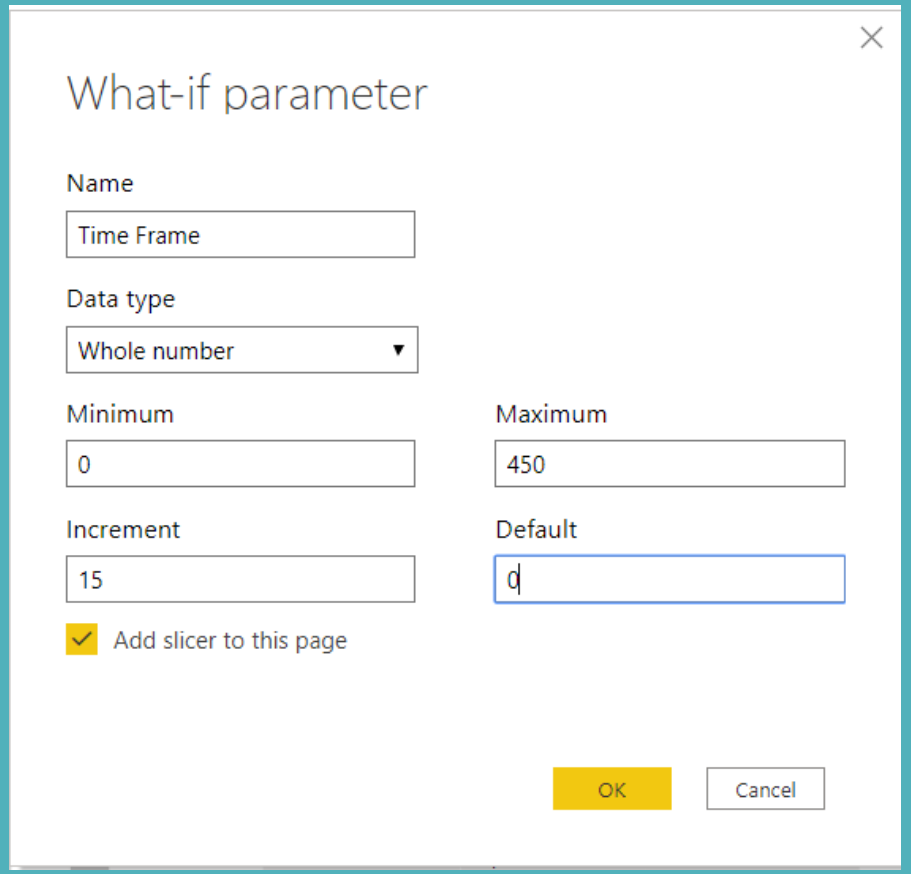
Find the new customers



Create a “Time Frame” from “What if Parameter”



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Advance Sales Analytics

Find the new customers

```
New Customers =
VAR CustomerTM = VALUES( Sales[Customer ID] )
VAR PriorCustomers = CALCULATETABLE( VALUES( Sales[Customer ID] ),
        FILTER( ALL( Dates ),
                Dates[Date] > MIN( Dates[Date] ) - [Time Frame Value] &&
                Dates[Date] <= MIN( Dates[Date] ) ) )
RETURN
        COUNTROWS(
                EXCEPT( CustomerTM, PriorCustomers ) )
```

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Advance Sales Analytics

Find the new customers

	Dates[Date] > MIN(Dates[Date]) – [Time Frame Value]	&&	Dates[Date] < MIN(Dates[Date])

Date Table
1/1/2015
-
-
-
-
31/12/2020

If Jan 2018 is Selected

Date Table Date	>	Date Table Minimum Date of Jan 2018	-	Date Table Time Frame	&&	Date Table Date	<	Date Table Minimum Date of Jan 2018
2/1/2018 – 120 (04-09-2017)					And	31/12/2017		

Time Period in Context

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Find the new customers

CustomerTM	PriorCustomers	New Customers
A	C	A
B	D	B
C	E	
D	F	
E	G	
F		
G		

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Advance Sales Analytics

Find the new customers

```
New Customer Sales =
VAR CustomerTM = VALUES( Sales[Customer ID] )
VAR PriorCustomers = CALCULATETABLE( VALUES( Sales[Customer ID] ),
        FILTER( ALL( Dates[Date] ),
                Dates[Date] > MIN( Dates[Date] ) - [Time Frame Value] &&
                Dates[Date] <= MIN( Dates[Date] ) ) )

        RETURN
                CALCULATE( [Total Sales],
                        EXCEPT( CustomerTM, PriorCustomers ) )
```

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SCENARIO 4

Find cross selling opportunities

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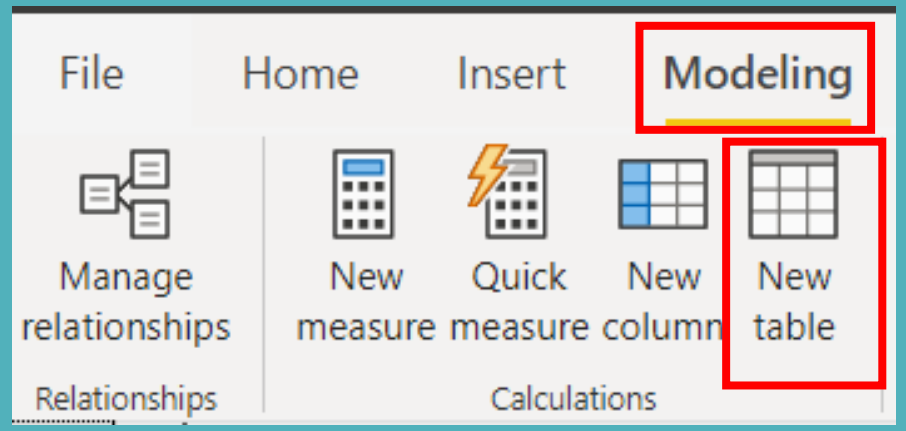
Advance Sales Analytics

Find cross selling opportunities



Create a "2nd Product List" Table

```
2nd Product List =
SUMMARIZE( Product, Product[Product Sort Index], Product[Product Name] )
```

```
1  2nd Product List =
2  SUMMARIZE( 'Product', 'Product'[Product Sort Index], Product[Product Name] )
```

Product Sort Index	Product Name
1	Product 1
2	Product 2
3	Product 3
4	Product 4
5	Product 5
6	Product 6
7	Product 7
8	Product 8
9	Product 9
10	Product 10

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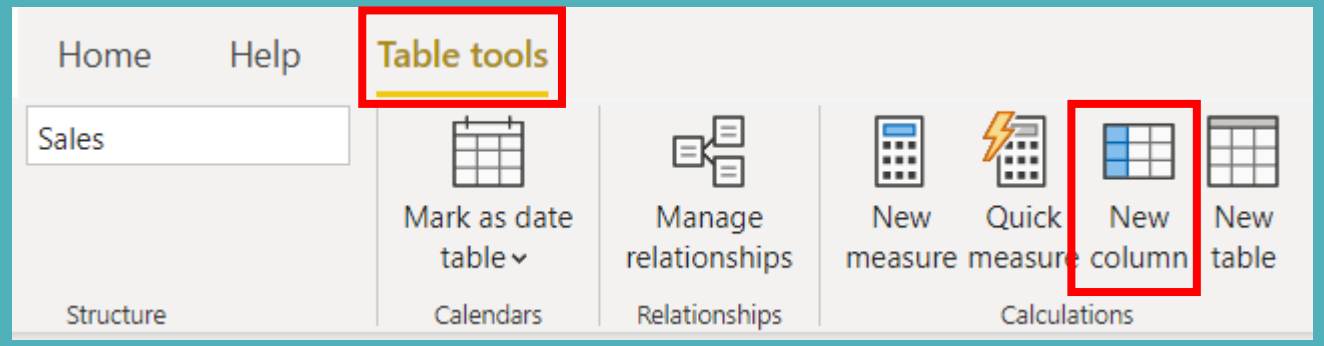
Advance Sales Analytics

Find cross selling opportunities

Create a “Product Sales Index” column




```
Product Sales Index =
RELATED('Product'[Product Sort Index])
```

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Find cross selling opportunities

```
Customer Purchases =
VAR CustomerSet = VALUES( Sales[Customer ID] )
RETURN
COUNTROWS( CustomerSet )
```

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Advance Sales Analytics

Find cross selling opportunities

```
Purchased Both Products =
VAR InitialPurchase = VALUES( Sales[Customer ID] )
VAR ComparisonPurchase = CALCULATETABLE( VALUES( Sales[Customer ID] ), ALL(
'Product' ),
        TREATAS( VALUES( '2nd Product List'[Product Sort Index] ), Sales[Product Sales
Index] ) )
RETURN
        IF( SELECTEDVALUE( 'Product'[Product Name] ) = SELECTEDVALUE( '2nd Product
List'[Product Name] ),
        BLANK(),
                COUNTROWS( INTERSECT( InitialPurchase, ComparisonPurchase ) ) )
```

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Find cross selling opportunities

```
% Purchased Both =
DIVIDE( [Purchased Both Products], [Customer Purchases], BLANK() )
```

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Advance Sales Analytics

Find cross selling opportunities

InitialPurchase	ComparisonPurchase	Purchased Both Products
A	C	C
B	D	D
C	E	E
D	F	F
E	G	G
F		
G		

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SCENARIO 5

Find the Customer Group with more YoY Sales Growth?

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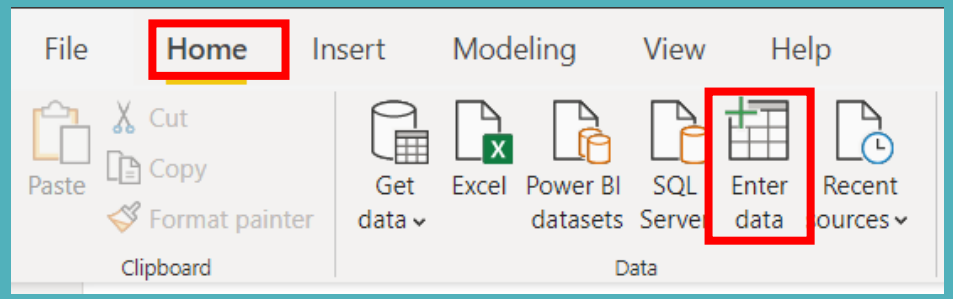
Advance Sales Analytics

Find the Customer Group with more YoY Sales Growth?

Create a “Customer Group” table



Group	Min Revenue	Max Revenue
Premium Client	*30000*	*100000*
Standard Client	*5000*	*30000*
Normal Client	*0*	*5000*

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Find the Customer Group with more YoY Sales Growth?

```
YoY Growth %  = DIVIDE( [Total Sales] - [Sales LY], [Sales LY], 0 )
```

```
Customer Growth Grouping =
CALCULATE( [YoY Growth %],
FILTER( VALUES( 'Customer Data'[Customer Name] ),
COUNTROWS(
FILTER( 'Customer Group',
[Sales LY] >= 'Customer Group'[Min Revenue] &&
[Sales LY] < 'Customer Group'[Max Revenue]) ) > 0 ) )
```

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Advance Sales Analytics

Find the Customer Group with more YoY Sales Growth?

```
Sales Growth Grouping =
CALCULATE( [Total Sales],
    FILTER( VALUES( 'Customer Data'[Customer Name] ),
        COUNTROWS(
            FILTER( 'Customer Group',
                [Sales LY] >= 'Customer Group'[Min Revenue] &&
                [Sales LY] < 'Customer Group'[Max Revenue] ) ) > 0 ) )
```

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SCENARIO 6

Find the Product Sales Trends overtime

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Find the Product sales Trends overtime

```
Sale LM = CALCULATE([Total Sales], DATEADD(Dates[Date},-1,MONTHS))
```

```
Monthly Sales Growth = DIVIDE([Total Sales],[Sale LM],0)-1
```

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SCENARIO 7

Find Salespersons which are growing their profit margins

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Find Salespersons which are growing their profit margins

```
Profit Margin LQ = CALCULATE( [Profit Margin %age],
                              DATEADD(Dates[Date], -1, QUARTER))
```

```
Profit Margin Growth = [Profit Margin %age] - [Profit Margin LQ]
```

```
Top 5 Sales Persons with Profit Margin =
CALCULATE([Profit Margin Growth],
TOPN(5,
All('Sales Person'[Salesperson Name]), [Profit Margin Growth], DESC),
VALUES('Sales Person'[Salesperson Name]))
```

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