Reporting Suite
(Health & Wellness)

Built **Marketing reports, Accounting reports and Customer reports** and various other reports that enabled daily tracking of KPIs by integrating data from internal and external sources

REPORTING SUITE TO ENABLE REAL-TIME VISIBILITY

ABOUT THE CLIENT

Client is a direct-to-consumer **health and wellness brand** with presence in U.S. and multiple countries across the world

SITUATION

- Client wanted to **track the performance of the business on a real-time basis** to take business decisions such as marketing spend and understand the cohort level performance based on a set of reports
- Key stakeholders required the key business metrics readily available over email and accessible over phone on a daily basis

VALUE ADDITION

- **Setup an ETL process** to load required data from various sources into a single database after necessary transformation using python queries and API calls
- Conceptualized and built **Customer Cohort Analysis Report, Accounting reconciliation report, Daily Marketing spend report, Customer care dashboards, Production and shipping reports** to support the business strategy and track the business performance metrics on Excel and Power BI
- Automated the generation and distribution of all the reports by setting up API connections to third party tools where necessary

IMPACT

- Weekly and monthly cohort reports built by Merilytics were used to track retention behavior of customers
- Provided daily visibility into customer acquisitions from various social media channels which enabled the business to redistribute the marketing spend across channels effectively
- Provided visibility on the performance of customer care team as well as production and shipping efficiency on a weekly basis that enabled appropriate resource planning

COHORT ANALYIS REPORT AND DAILY MARKETING SPEND REPORT

Updated as of 30-Aug-19 | Report based on "Order Date" and by "Last Touch" Attribution Model

Daily spends and Conversions by Last Touch Attribution					Paid Media			MDVIP	Partner			Organic	Total			
Day of Week	Date	Unique Visitors to the Site	Number of VATs	Cost per VAT	Online Marketing Spend	Initial Orders	Paid Media CAC	Initial Orders	Marketing Spend	Initial Orders	Partner CAC	Initial Orders	Online Marketing Spend	Initial Orders	CAC	Number of Reorders
Monday	12-Aug-19	5,353	1,450	$9.2	$12,900	47	$274	-	$448	16	$28	36	$13,348	99	$135	202
Tuesday	13-Aug-19	4,773	1,257	$9.6	$11,593	36	$322	-	$448	13	$34	33	$12,041	82	$147	162
Wednesday	14-Aug-19	5,679	1,420	$8.2	$11,161	29	$385	-	$448	17	$26	31	$11,609	77	$151	260
Thursday	15-Aug-19	17,893	3,361	$11.9	$10,761	34	$316	-	$29,138	181	$161	48	$39,898	263	$152	156
Friday	16-Aug-19	5,704	859	$14.2	$5,750	24	$240	-	$6,428	44	$146	24	$12,178	92	$132	220
Saturday	17-Aug-19	3,473	691	$10.3	$5,132	15	$342	1	$2,004	13	$154	13	$7,136	42	$170	159
Sunday	18-Aug-19	4,185	913	$9.3	$7,256	40	$181	-	$1,204	24	$50	26	$8,460	90	$94	149
Monday	19-Aug-19	5,686	1,359	$8.8	$11,369	46	$247	-	$604	28	$22	19	$11,973	94	$127	204
Tuesday	20-Aug-19	5,012	1,101	$8.6	$8,823	27	$327	1	$604	28	$22	26	$9,427	82	$115	164
Wednesday	21-Aug-19	5,021	1,373	$8.5	$11,028	37	$298	3	$604	25	$24	32	$11,632	97	$120	210
Thursday	22-Aug-19	5,729	1,211	$9.0	$10,298	46	$224	1	$604	29	$21	16	$10,901	92	$118	230
Friday	23-Aug-19	4,980	1,099	$10.7	$11,111	46	$242	1	$604	17	$36	31	$11,715	95	$123	278
Saturday	24-Aug-19	5,501	1,374	$10.7	$14,118	54	$261	-	$604	17	$36	17	$14,722	88	$167	148
Sunday	25-Aug-19	6,129	1,736	$9.9	$16,622	58	$287	-	$604	23	$26	19	$17,226	100	$172	197
Monday	26-Aug-19	6,422	1,341	$11.8	$15,162	48	$316	1	$604	25	$24	41	$15,766	115	$137	276
Tuesday	27-Aug-19	7,915	1,812	$10.8	$19,036	45	$423	3	$604	25	$24	34	$19,640	107	$184	187
Wednesday	28-Aug-19	5,599	1,297	$9.3	$11,437	31	$369	-	$604	24	$25	29	$12,041	84	$143	213
Thursday	29-Aug-19	4,103	902	$9.6	$8,095	20	$405	-	$604	33	$18	7	$8,699	60	$145	241
Friday	30-Aug-19	4,020	850	$12.3	$9,877	33	$299	1	$604	17	$36	31	$10,481	82	$128	361
Grand Total		3,147,453	1,002,998	$5.7	$5,180,297	22,732	$228	28	$503,019	8,206	$61	12,124	$5,683,316	43,090	$132	80,063

Daily Report to track marketing spend by channel

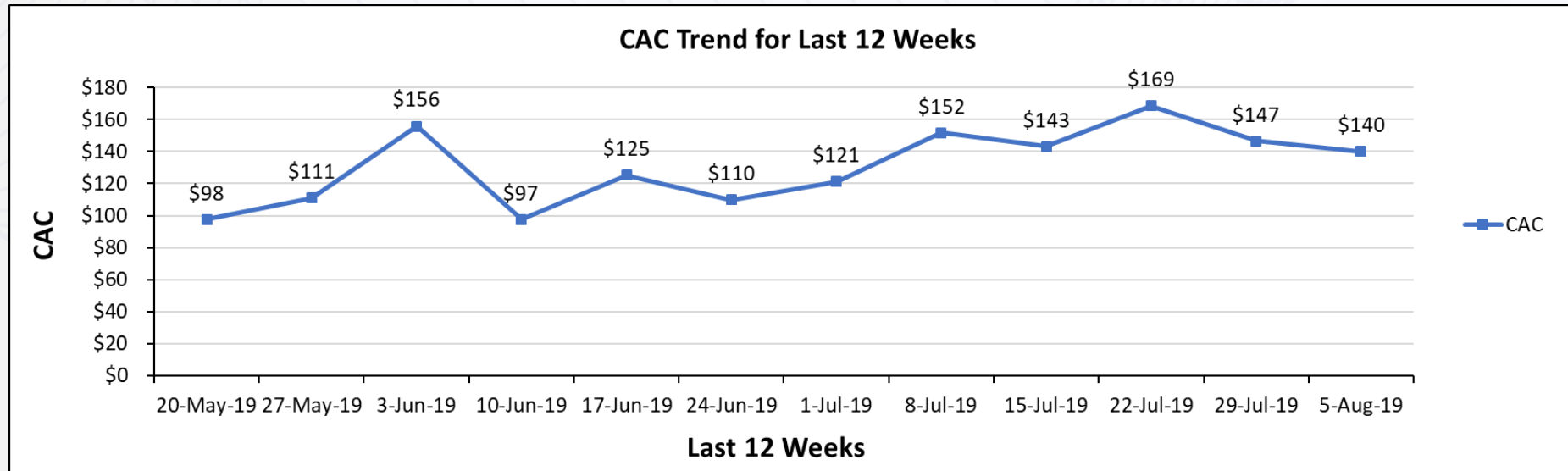| C#	Cohort Week Beginning	Cohort Week Ending	Total Life Time Orders	Average Life Time Orders	% New Customer Discount	Average First Order Discount	CAC*	Discount + CAC*	New Customer Growth	New Customers Order 1		Period 2		Period 3		Period 4	
94	15-Apr-19	21-Apr-19	3,303	6.46	41.5%	$ 29	$ 111	$ 140	-1%	511	100%	352	69%	256	50%	115	23%
95	22-Apr-19	28-Apr-19	4,044	6.37	46.4%	$ 32	$ 119	$ 152	24%	635	100%	407	64%	295	46%	142	22%
96	29-Apr-19	5-May-19	3,438	6.46	43.4%	$ 31	$ 76	$ 107	-16%	532	100%	352	66%	262	49%	130	24%
97	6-May-19	12-May-19	2,006	6.51	49.5%	$ 34	$ 114	$ 148	-42%	308	100%	195	63%	130	42%	62	20%
98	13-May-19	19-May-19	2,456	6.84	37.7%	$ 26	$ 103	$ 129	17%	359	100%	255	71%	220	61%	94	26%
99	20-May-19	26-May-19	3,290	6.65	42.2%	$ 29	$ 98	$ 127	38%	495	100%	322	65%	249	50%	117	24%
100	27-May-19	2-Jun-19	1,779	6.74	39.9%	$ 27	$ 111	$ 138	-47%	264	100%	190	72%	134	51%	68	26%
101	3-Jun-19	9-Jun-19	1,944	6.94	38.8%	$ 27	$ 156	$ 183	6%	280	100%	197	70%	139	50%	109	39%
102	10-Jun-19	16-Jun-19	1,882	6.92	36.8%	$ 27	$ 97	$ 124	-3%	272	100%	194	71%	126	46%	106	39%
103	17-Jun-19	23-Jun-19	2,451	6.83	39.9%	$ 32	$ 125	$ 157	32%	359	100%	219	61%	170	47%	140	39%
104	24-Jun-19	30-Jun-19	2,764	6.96	39.4%	$ 30	$ 110	$ 140	11%	397	100%	277	70%	207	52%	155	39%
105	1-Jul-19	7-Jul-19	1,922	6.91	37.9%	$ 29	$ 121	$ 150	-30%	278	100%	183	66%	138	50%	109	39%
106	8-Jul-19	14-Jul-19	3,617	7.00	37.6%	$ 30	$ 152	$ 181	86%	517	100%	383	74%	257	50%	202	39%
107	15-Jul-19	21-Jul-19	4,955	6.93	40.1%	$ 30	$ 143	$ 174	38%	715	100%	483	68%	355	50%	279	39%
108	22-Jul-19	28-Jul-19	4,568	6.90	35.2%	$ 27	$ 169	$ 195	-7%	662	100%	427	65%	329	50%	259	39%
109	29-Jul-19	4-Aug-19	4,097	6.89	36.7%	$ 28	$ 147	$ 175	-10%	595	100%	376	63%	296	50%	233	39%
110	5-Aug-19	11-Aug-19	4,121	6.90	37.0%	$ 28	$ 154	$ 183	0%	597	100%	377	63%	297	50%	234	39%
111	12-Aug-19	18-Aug-19	5,067	6.90	38.6%	$ 29	$ 143	$ 172	23%	734	100%	464	63%	366	50%	288	39%
112	19-Aug-19	25-Aug-19	4,211	6.90	37.3%	$ 29	$ 144	$ 173	-17%	610	100%	386	63%	304	50%	239	39%
113	26-Aug-19	1-Sep-19	4,463	7.95	35.4%	$ 29	$ 119	$ 148	-8%	561	100%	418	63%	329	50%	259	39%
114	2-Sep-19	8-Sep-19	3,292	6.92					-15%	476	100%	301	63%	238	50%	187	39%

Cohort analysis report to track customer retention behavior by weekly cohorts

3

CUSTOMER CHURN REPORT AND CAC TREND REPORT

Cohort Start Date	Cohort End Date	New Customers	Re-Orders	Cancellations within 1 Week	% of Cancellations within 1 Week	Cancellations within 2 Weeks	% of Cancellations within 2 Weeks	Cancellations within 3 Weeks	% of Cancellations within 3 Weeks	Cancellations within 4 Weeks	% of Cancellations within 4 Weeks
20-May-19	26-May-19	495	625	46	9.3%	61	12.3%	138	27.9%	166	33.5%
27-May-19	2-Jun-19	264	343	19	7.2%	27	10.2%	65	24.6%	79	29.9%
3-Jun-19	9-Jun-19	280	337	32	11.4%	47	16.8%	75	26.8%	87	31.1%
10-Jun-19	16-Jun-19	272	298	22	8.1%	33	12.1%	68	25.0%	83	30.5%
17-Jun-19	23-Jun-19	359	331	42	11.7%	64	17.8%	114	31.8%	136	37.9%
24-Jun-19	30-Jun-19	397	377	33	8.3%	52	13.1%	87	21.9%	122	30.7%
1-Jul-19	7-Jul-19	278	183	24	8.6%	43	15.5%	73	26.3%	88	31.7%
8-Jul-19	14-Jul-19	517	358	51	9.9%	70	13.5%	120	23.2%	161	31.1%
15-Jul-19	21-Jul-19	715	399	70	9.8%	107	15.0%	171	23.9%	208	29.1%
22-Jul-19	28-Jul-19	662	28	49	7.4%	87	13.1%	120	18.1%	120	18.1%
29-Jul-19	4-Aug-19	597	5	58	9.7%	71	11.9%	71	11.9%		
5-Aug-19	11-Aug-19	593	5	32	5.4%	32	5.4%				

Customer Churn report looking at the subscription cancellation rate

CAC Trend for Last 12 Weeks

$98, $111, $156, $97, $125, $110, $121, $152, $143, $169, $147, $140

X-axis: 20-May-19, 27-May-19, 3-Jun-19, 10-Jun-19, 17-Jun-19, 24-Jun-19, 1-Jul-19, 8-Jul-19, 15-Jul-19, 22-Jul-19, 29-Jul-19, 5-Aug-19

Last 12 Weeks

CAC

Customer acquisition cost trend report to measure the improvement of marketing campaigns