



# RFM-BASED SALES DASHBOARD

*Optimizing Customer Retention and Revenue*

Date: 23 October, 2025



# THE BUSINESS PROBLEMS:

## Critical Challenge #1: Revenue Decline & Customer Attrition

- **Current Reality:** Your sales dropped to \$1,966K from \$1,574K last year (24.9% growth, but with hidden risks).
- **The Hidden Crisis:** You have 29 "Lost" customers in your segment. These are high-value customers who've stopped purchasing.
- **Financial Impact:** If each lost customer previously spent your average monetary value (\$2,491), you're bleeding approximately \$72,000+ in annual revenue.

## Critical Challenge #2: Blind Spot Management

- **Current Reality:** 105 customers are classified as "At Risk," with an average purchase recency of 200 days.
- **The Hidden Crisis:** Customers are waiting longer between purchases, signaling declining engagement.
- **Financial Impact:** Potential revenue loss of around \$261,000 if no intervention is made.

## Critical Challenge #3: Resource Misallocation

- **Current Reality:** Big spenders like Mitch Willingham contribute over \$3,333, while some lost customers spent less than \$15.
- **The Hidden Crisis:** Marketing treats all customers equally despite large differences in value.
- **Financial Impact:** Inefficient marketing spend leading to suboptimal return on investment.



# Sales Dashboard - RFM

City

All

Year

All

Sales

\$1.966K



▲ 24.9% | LY \$1,574K

Average Recency

200



▼ (0.5%) | LY 201

Average Frequency

5



▼ (0.7%) | LY 5

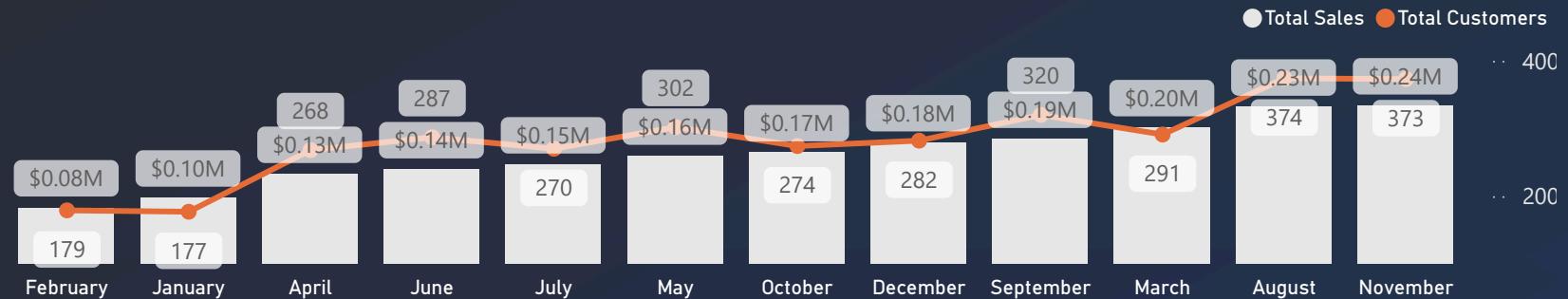
Average Monetary Value

2.491

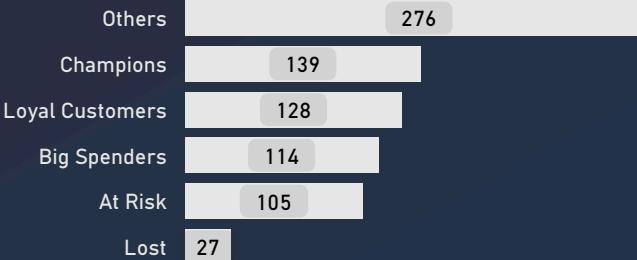


▼ (0.8%) | LY \$2.51K

## Monthly Trend Overview



## Segment Split



## Category Split (by customers)



## Customers Details

Customer ID	Customer Name	Customer_Segment	Frequency	Monetary	Recency
JH-15430	Jennifer Halladay	Lost	1	55.67	1295
MW-18235	Mitch Willingham	Big Spenders	1	3,333.90	1208
HH-15010	Hilary Holden	Lost	1	123.28	1108
NB-18580	Nicole Brennan	Lost	2	273.87	1054
RB-19330	Randy Bradley	Lost	1	670.38	1028
GR-14560	Georgia Rosenberg	Others	2	1,284.38	1024
BF-11080	Bart Folk	Lost	1	14.67	1017
DK-13150	David Kendrick	Lost	1	433.56	1010
RE-19405	Ricardo Emerson	Lost	1	48.36	986
AJ-10960	Astrea Jones	Lost	2	618.61	985



# THE STRATEGIC SOLUTION:



## Immediate Actions (Next 30 Days):

### At-Risk Customer Recovery

- Personalized emails + 15% discount targeting 105 customers
- Investment: \$5,000 | Expected Return: \$75,000 (1,400% ROI)

### VIP Champions Program

- Exclusive early access & support for 139 top customers
- Investment: \$8,000 | Expected Return: \$55,000 (20% frequency increase)

### Big Spender Engagement

- Subscription and bulk purchase incentives for 114 customers
- Investment: \$3,000 | Expected Return: \$20,000

## Medium-Term Actions (Next 90 Days):

### Lost Customer Win-Back

- Target high-value lost customers with personalized offers
- Investment: \$10,000 | Expected Return: \$60,000

### Q1 Revenue Boost Campaign:

- Flash sales on Office Supplies & Furniture during slow months
- Investment: \$15,000 | Expected Lift: \$80,000

### Category Cross-Sell:

- Move Office Supplies customers to higher-value Technology
- Investment: \$7,000 | Expected Return: \$70,000

