KPI Reference Sheet

Page#

Patient's Name

Contoso Project

We defined LY and YoY measures consistently using DATEADD so all KPIs align temporally. For operational metrics like stores, employees, and SKUs, we forced CROSSFILTER to ensure we only count entities that actually contributed to sales.

KPI Name	Calculation
◆ Sales & Cost	
Net Sales	SUM(Sales[SalesAmount]) – SUM(Sales[ReturnAmount])
Net Sales Last year	Calculate([Net Sales], DATEADD('Date'[DateKey],-1,YEAR))
Total Cost	SUM(Sales[TotalCost])
Total Cost (mio)	[Total Cost]/1000000
Total Cost Y/Y %	Divide([Total Cost], Calculate([Total Cost], DATEADD('Date'[DateKey], -1, YEAR))) -1
◆ Quantity	
Sales Quantily	SUM(Sales[SalesQuantity])
Sales Quantity (mio)	[Sales Quantity]/1000000
Sales Quantity Last Year	Calculate([Sales Quantity], DATEADD('Date'[DateKey], -1, YEAR))
Sales Quantity Y/Y %	DIVIDE([Sales Quantity], [Sales Quantity Last Year) -1
◆ Profitability	
Gross Profit	[Net Sales] – [Total Cost]
Gross Profit (mio)	[Gross Profit]/1000000
Gross Profit Last Year	Calculate([Gross Profit], DATEADD('Date'[DateKey], -1, YEAR))
Gross Profit Y/Y %	DIVIDE([Gross Profit (mio)], Calculate([Gross Profit (mio)], DATEADD('Date'[DateKey], -1, YEAR))) – 1
Gross Margin	Divide([Gross Profit], [Net Sales])
Gross Margin Last Year %	Calculate([Gross Margin %], DATEADD('Date'[DateKey], -1, YEAR))
◆ Store footprint	
Store Count	Calculate(DISTINCTCOUNT(Store[StoreKey]), CROSSFILTER(Sales[StoreKey], Store[StoreKey], both))
Store Last Year	Calculate([Store], DATEADD('Date'[DateKey], -1, YEAR))
Store Area	Calculate(SUM(Store[SellingAreaSize]), CROSSFILTER(Sales[StoreKey], Store[StoreKey], BOTH))
Store Area Y/Y%	DIVIDE([Store Area], Calculate([Store Area], DATEADD('Date'[DateKey], -1, YEAR))) -1
◆ Workforce	

Commented [FW1]: Total Cost show in millions

Commented [FW2]: How much Total Cost increased or decreased vs last year
Positive = costs grew
Negative = costs shrank

Commented [FW3]: Gross Profit ÷ Net Sales
Tells you *how profitable each dollar of sales is*.

Commented [FW4]: Gross Margin LY %
Gross margin last year
Used to see margin expansion or compression.

Commented [FW5]: Number of distinct stores that actually had sales
The CROSSFILTER forces the count to respect Sales activity.

Commented [FW6]: Store Area
Total selling area size of active stores
Used to analyze productivity per square meter/foot.

Commented [FW7]: Store Area Y/Y %
Expansion or contraction of selling space vs last year

Employees	Calculate(SUM(Store[EmployeeCount]), CROSSFILTER(Sales[StoreKey], Store[StoreKey], BOTH))
Employees Y/Y%	DIVIDE([Employees], Calculate([Employees], DATEADD('Date'[DateKey], -1, YEAR))) -1
◆ Product assortment	
SKUs (Stock keeping units)	Calculate(DISTINCTCOUNT('Product'[ProductKey]),CROSSFILTER(Sales[ProductKey], 'Product'[ProductKey], BOTH))
SKUs Last Year	Calculate([SKUs], DATEADD('Date'[DateKey], -1, YEAR))
Brands	Calculate(DISTINCTCOUNT('Product'[BrandName]),CROSSFILTER(Sales[ProductKey], 'Product'[ProductKey], BOTH))
Brands Y/Y %	DIVIDE([Brands], CALCULATE([Brands], DATEADD('Date'[DateKey], -1,YEAR))) – 1
Categories	CALCULATE (COUNT (ProductCategory[ProductCategoryKey]),CROSSFILTER (ProductSubcategory[ProductCategoryKey], ProductCategory[ProductCategoryKey], BOTH), CROSSFILTER('Product'[ProductSubcategoryKey],ProductSubcategory[ProductSubcategoryKey], BOTH), CROSSFILTER (Sales[ProductKey], 'Product'[ProductKey], BOTH))
Category Y/Y %	DIVIDE([Categories],CALCULATE([Categories], DATEADD('Date'[DateKey], -1, YEAR))) -1

Commented [FW8]: Employees
Total employee count across active stores filtered through Sales.

Commented [FW9]: Employees Y/Y %
Workforce growth or reduction vs last year

Commented [FW10]: SKUs
Number of distinct products actually sold
Not just listed products, but ones with sales.

Commented [FW11]: Brands
Number of distinct brands sold

Commented [FW12]: Categories
Number of product categories that had sales