

Excel Formulas

Sheet: Marketing Campaign Data

Column: MntTotal

```
=SUM([@MntWines]+[@MntFruits]+[@MntMeatProducts]+[@MntFishProducts]+  
[@MntSweetProducts]+[@MntGoldProds])
```

Column: TotalPurchase

```
=SUM([@NumDealsPurchases]+[@NumWebPurchases]+[@NumCatalogPurchases]+  
[@NumStorePurchases])
```

Column: DealShare

```
=IF([@TotalPurchase]=0,0,[@NumDealsPurchases]/[@TotalPurchase])
```

Column: WebShare

```
=IF([@TotalPurchase]=0,0,[@NumWebPurchases]/[@TotalPurchase])
```

Column: CatalogShare

```
=IF([@TotalPurchase]=0,0,[@NumCatalogPurchases]/[@TotalPurchase])
```

Column: StoreShare

```
=IF([@TotalPurchase]=0,0,[@NumStorePurchases]/[@TotalPurchase])
```

Column: Deal_AttrRevenue

```
=[@MntTotal]*[@DealShare]
```

Column: Web_AttrRevenue

=[@MntTotal]*[@WebShare]

Column: Catalog_AttrRevenue

=[@MntTotal]*[@CatalogShare]

Column: Store_AttrRevenue

=[@MntTotal]*[@StoreShare]

Column: Segment

=IFS([@MntTotal] >= HighValue_P80, "High", [@MntTotal] >= MidValue_P50, "Mid", TRUE, "Low")

Column: JoinMonth

=DATE(YEAR([@[Dt_Customer]]), MONTH([@[Dt_Customer]]), 1)

Column: TotalCmpAccepted

=[@AcceptedCmp1]+[@AcceptedCmp2]+[@AcceptedCmp3]+[@AcceptedCmp4]+
[@AcceptedCmp5]

Sheet: Marketing Spend

Total_Attributed_Revenue

=SUM(Deal_AttrRev+Web_AttrRev+Catalog_AttrRev+Store_AttrRev)

Marketing Budget =Total_AttrRevenue*0.077

Marketing Budget Low (-20%) =Marketing_Budget*0.8

Marketing Budget High (+20%) =Marketing_Budget*1.2

Column: Channel Spend (Base)

Web =Marketing_Budget*45%

Catalog =Marketing_Budget*20%

Deal =Marketing_Budget*10%

Store =Marketing_Budget*25%

Same Formula for Marketing Budget Low (-20%) and High (+20%).

Sheet: ROI Calculation

Column: Overall ROI

=(Total_AttrRevenue - Marketing_Budget) / Marketing_Budget

Column: Channel Revenue

Store =SUM(Store_AttrRev)

Catalog =SUM(Catalog_AttrRev)

Deals =SUM(Deal_AttrRev)

Web =SUM(Web_AttrRev)

Column: Channel ROI

=(Channel_Revenue - Channel_Spend) / Channel_Spend

Sheet: Segment Calculation

HighValue (P80) =PERCENTILE.INC(tblCust[MntTotal],0.8)

MidValue (P50)	=PERCENTILE.INC(tblCust[MntTotal],0.5)
Min	=MIN(tblCust[MntTotal])
Mean	=AVERAGE(tblCust[MntTotal])
Median	=MEDIAN(tblCust[MntTotal])
Mode	=MODE.SNGL(tblCust[MntTotal])
Max	=MAX(tblCust[MntTotal])

Sheet: Cohort Analysis

JoinedMonth:

=SORT(UNIQUE(tblCust[JoinMonth]))

NewCustomer (Cohort New Customers by month using JoinMonth column in Cell C6):

=COUNTIF(tblCust[JoinMonth],\$C6)

ShareofCustomer:

=D6/SUM(\$D\$6:\$D\$28)

CohortValue:

=SUMIF(tblCust[JoinMonth],\$C6,MntTotal)

ShareofValue:

=F6/SUM(\$F\$6:\$F\$28)

AvgValue:

=AVERAGEIF(tblCust[JoinMonth],\$C6,MntTotal)

ValueIndex:

H6/AVERAGE(AvgValue)

AvgRecency:

=AVERAGEIF(tblCust[JoinMonth],\$C6,tblCust[Recency])

Active Rate (Recency ≤ 30), per JoinMonth in cell C6:

=COUNTIFS(tblCust[JoinMonth],\$C6,tblCust[Recency],"<="&30) /
COUNTIFS(tblCust[JoinMonth],\$C6)

At-Risk Rate (Recency ≥ 90):

=COUNTIFS(tblCust[JoinMonth],\$C6,tblCust[Recency],">="&90) /
COUNTIFS(tblCust[JoinMonth],\$C6)

AvgWebShare:

=AVERAGEIFS(tblCust[WebShare],tblCust[JoinMonth],\$C6)

AvgCatalogShare:

=AVERAGEIFS(tblCust[CatalogShare],tblCust[JoinMonth],\$C6)

AvgStoreShare:

=AVERAGEIFS(tblCust[StoreShare],tblCust[JoinMonth],\$C6)

AvgDealShare:

=AVERAGEIFS(tblCust[DealShare],tblCust[JoinMonth],\$C6)

WebVisitsMonth:

=SUMIF(tblCust[JoinMonth],C6,tblCust[NumWebVisitsMonth])

AvgResponseRate:

=AVERAGEIF(tblCust[JoinMonth],C6,tblCust[Response])

CampAcceptanceRate:

=AVERAGEIF(tblCust[JoinMonth],C6,tblCust[TotalCmpAccepted])

ComplaintRate:

=AVERAGEIF(tblCust[JoinMonth],C6,tblCust[Complain])