Module 6: Level Of Detail (LOD) Expressions Tableau

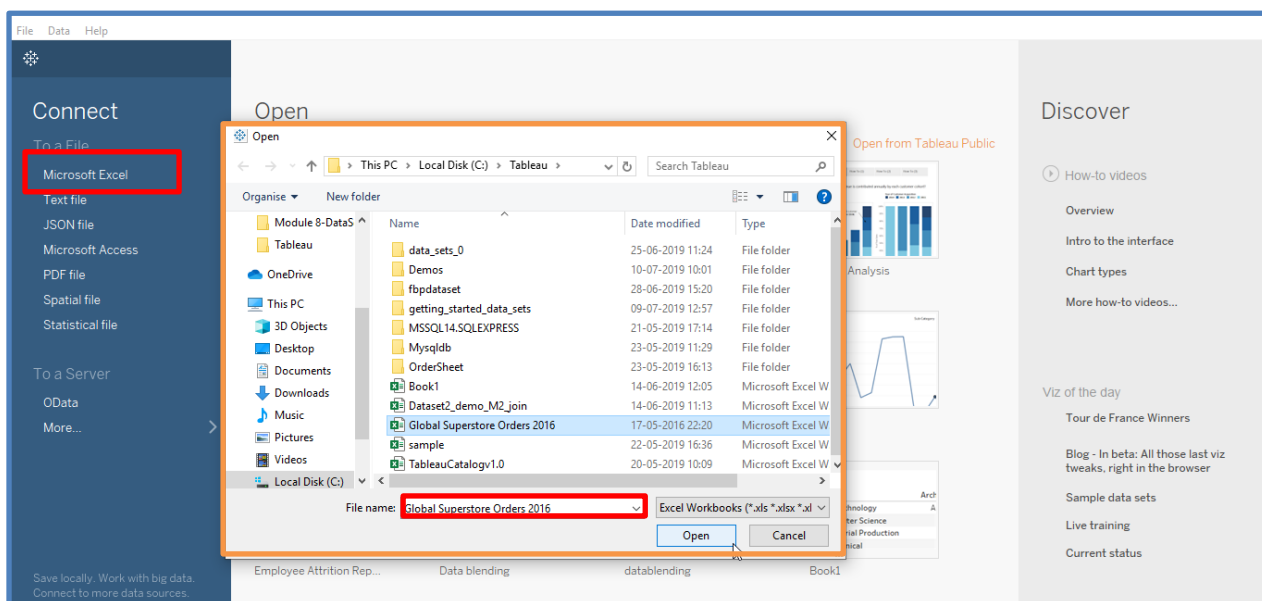## Use Case- VI

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Use Case VI: Cohort Analysis

Using "Global Superstore Order 2016 Dataset", create a report which shows the annual revenue contributed by each customer cohort.
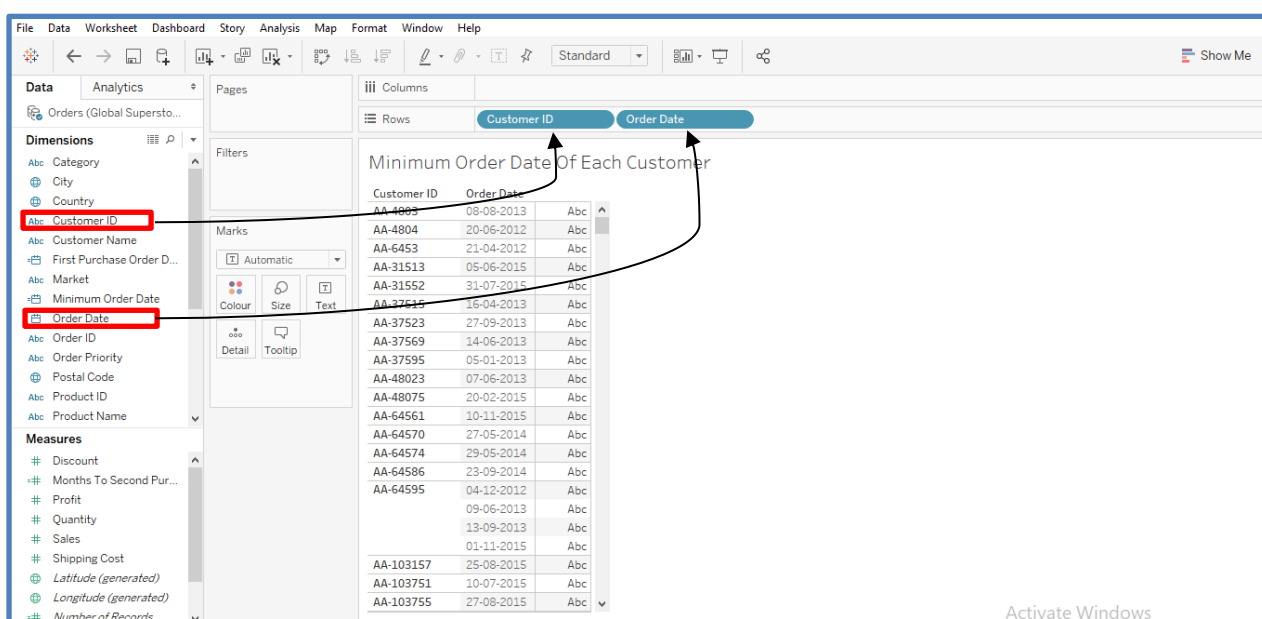
Refer the dataset: Global Superstore Order 2016.xlsx

Use Case VI – Solution

Step 1: Click on Connect → Microsoft Excel → Global Superstore Orders 2016 Dataset → Sheet1

Step 2: Drag Customer ID and Order Date to Row shelf and make Order Date exact and Discrete (to get accurate date for each customer).

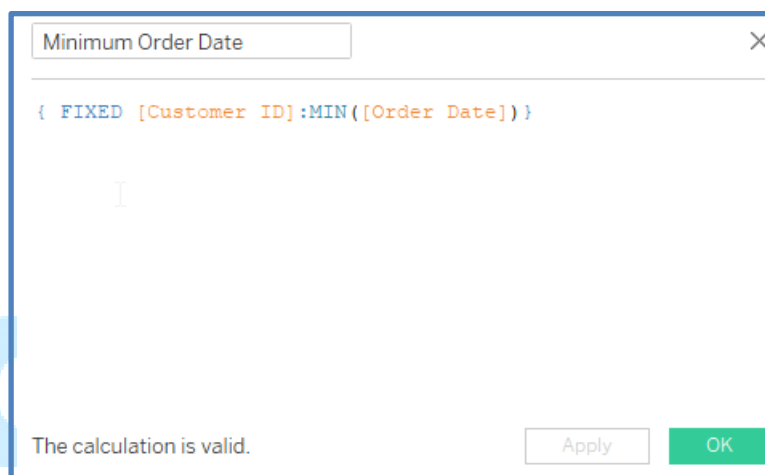Requirement is to find first purchase Order Date of each customer.

Step 3: Create a calculated field to calculate minimum order date of each customer.

Calculating each customer's first purchase date by fixing the minimum order date to Customer ID. This will replicate the first purchase date across all rows for the customer.

Data pane → Dimension → Drop Down → Create Calculated Field

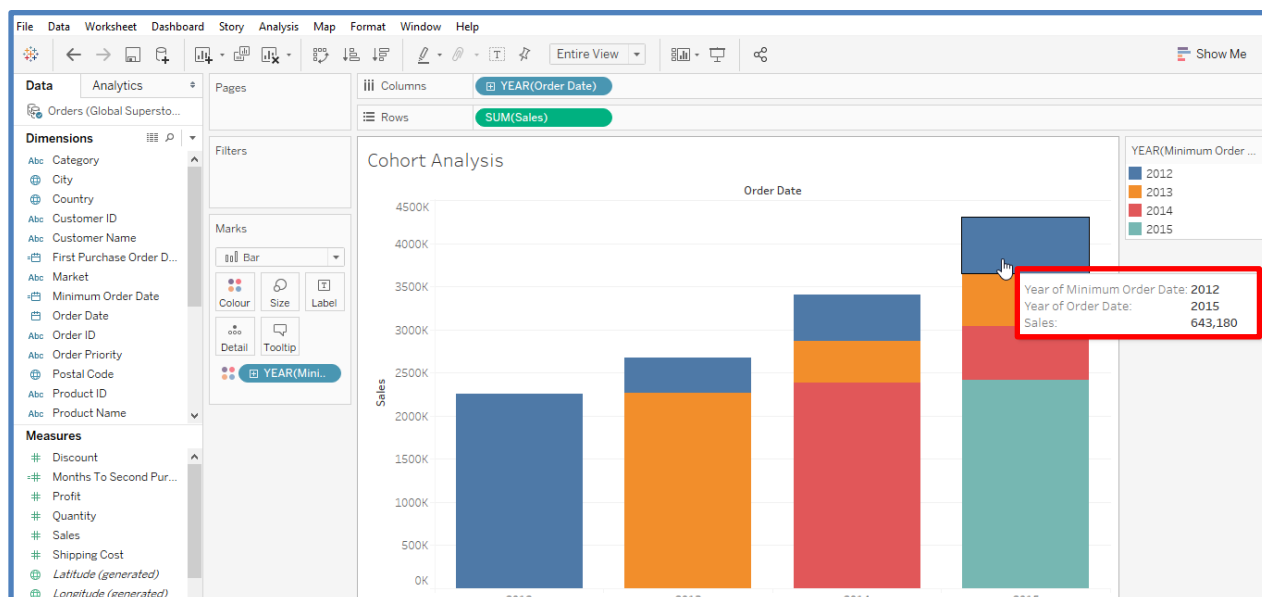Dialog Box → Rename to "Minimum Order Date" → Calculation

Calculation: {FIXED [Customer ID]: MIN ([Order Date])}

Step 4: Drag "Sales" to Column shelf and "Order Date" field to Row shelf (make it exact and discrete).

Drag "Minimum Order Date" to Color in Mark shelf.

The above shown visualization is a Cohort Analysis, which depicts contribution of customer in each year, in sales.

Visualization of contribution in percentage.