Tableau Analytics

Assignment – 4

Create basic and Lod calculations in Tableau

1. **Customer Segmentation based on Recency, Frequency, and Monetary (RFM) Analysis:**

Creating new Calculated fields Frequency, Recency, Monetary.

Frequency	×

```
{FIXED [Customer ID]: COUNTD([Order ID])}
```

The calculation is valid.   2 Dependencies ▾   Apply   OK

Monetary	×

```
{FIXED [Customer ID]: SUM([Sales])}
```

The calculation is valid.   2 Dependencies ▾   Apply   OK
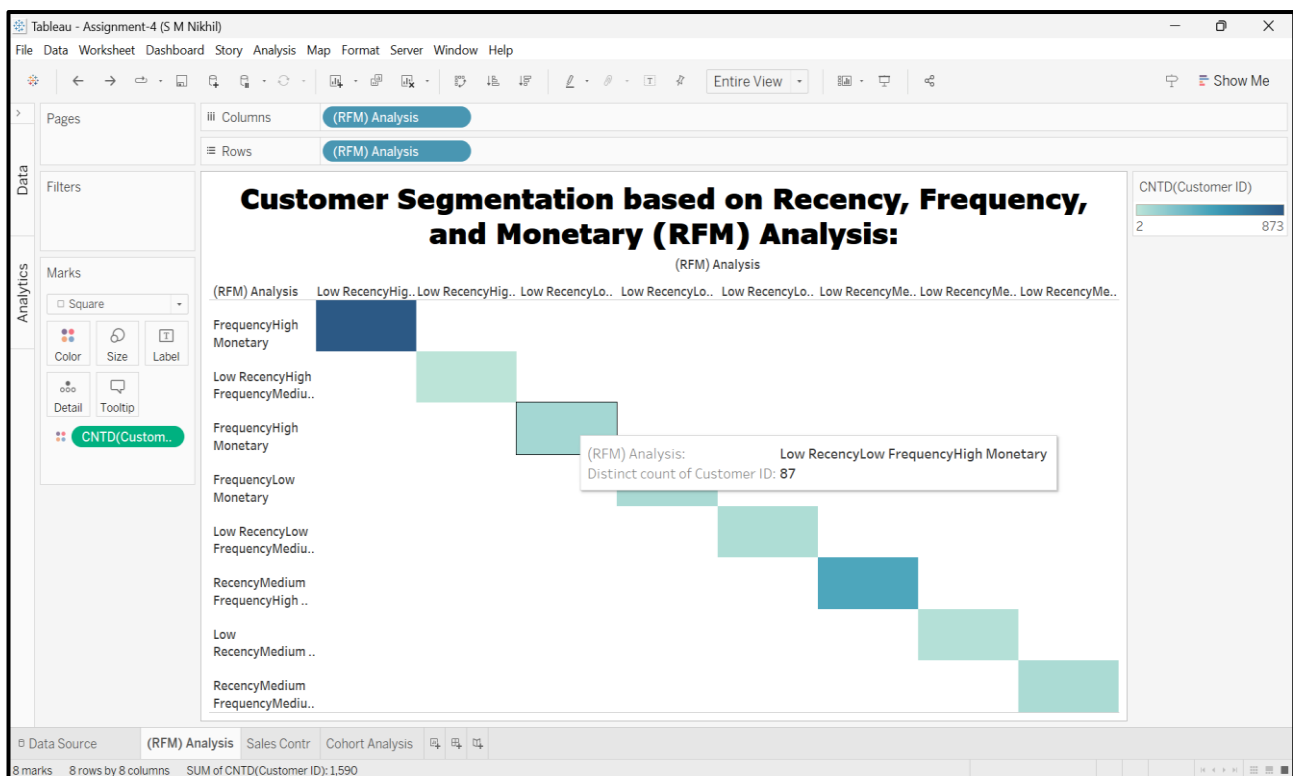
Recency	×

```
[Customer ID]: DATEDIFF('day', MAX([Order Date]), TODAY())}
```

The calculation is valid.   2 Dependencies ▾   Apply   OK

(RFM) Analysis

```
IF [Recency] <= 30 THEN 'High Recency'
ELSEIF [Recency] <= 60 THEN 'Medium Recency'
ELSE 'Low Recency'
END


+


IF [Frequency] >= 10 THEN 'High Frequency'
ELSEIF [Frequency] >= 5 THEN 'Medium Frequency'
ELSE 'Low Frequency'
END


+


IF [Monetary] >= 1000 THEN 'High Monetary'
ELSEIF [Monetary] >= 500 THEN 'Medium Monetary'
ELSE 'Low Monetary'
END
```

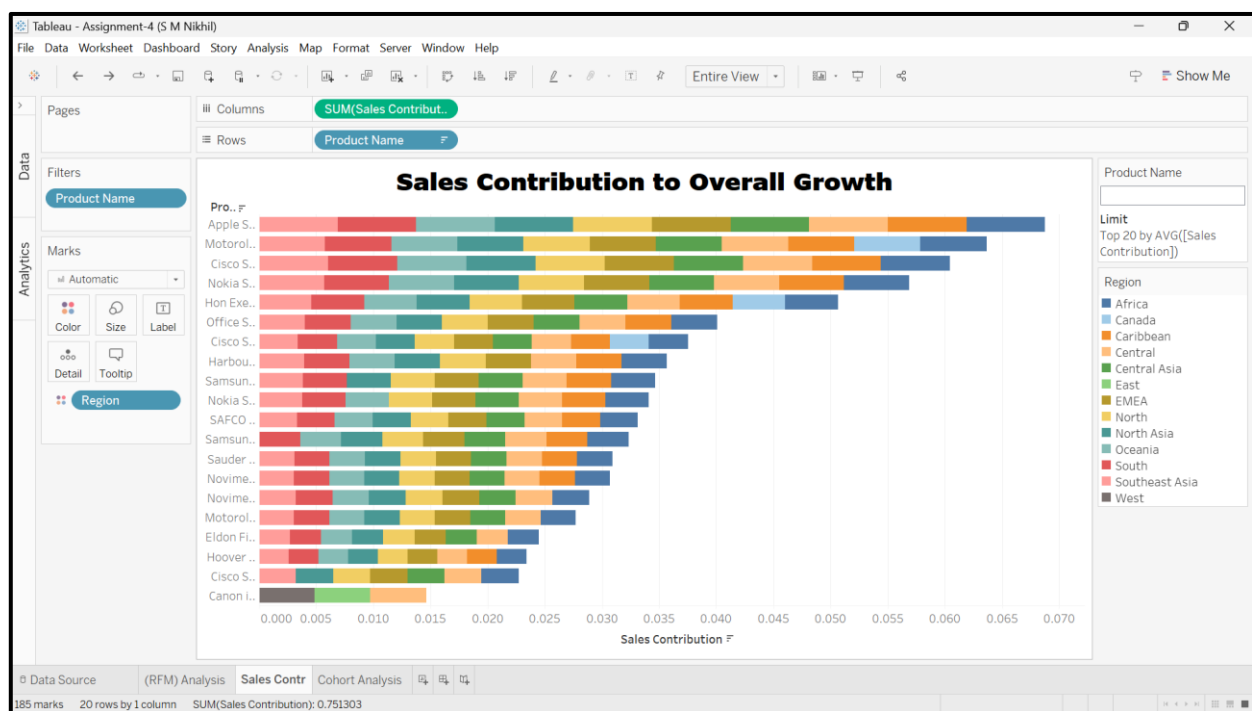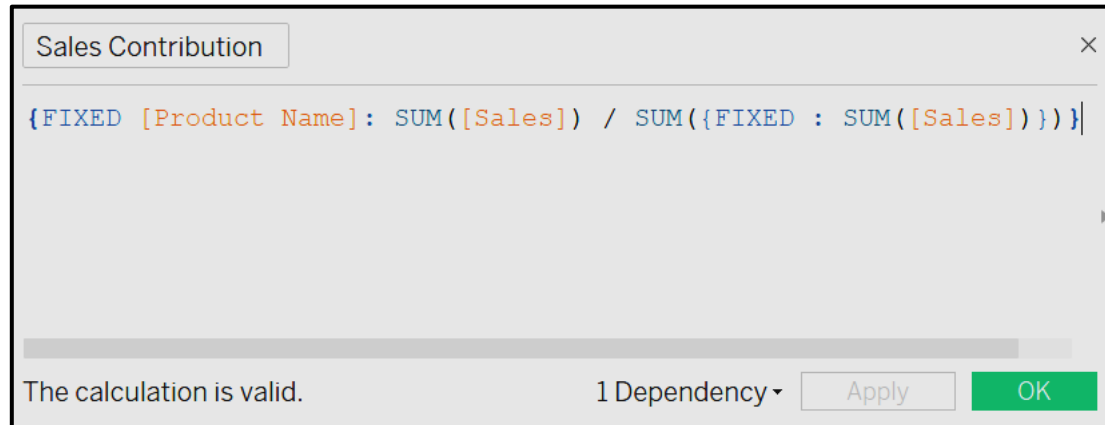The calculation is valid.   1 Dependency ▾   Apply   OK
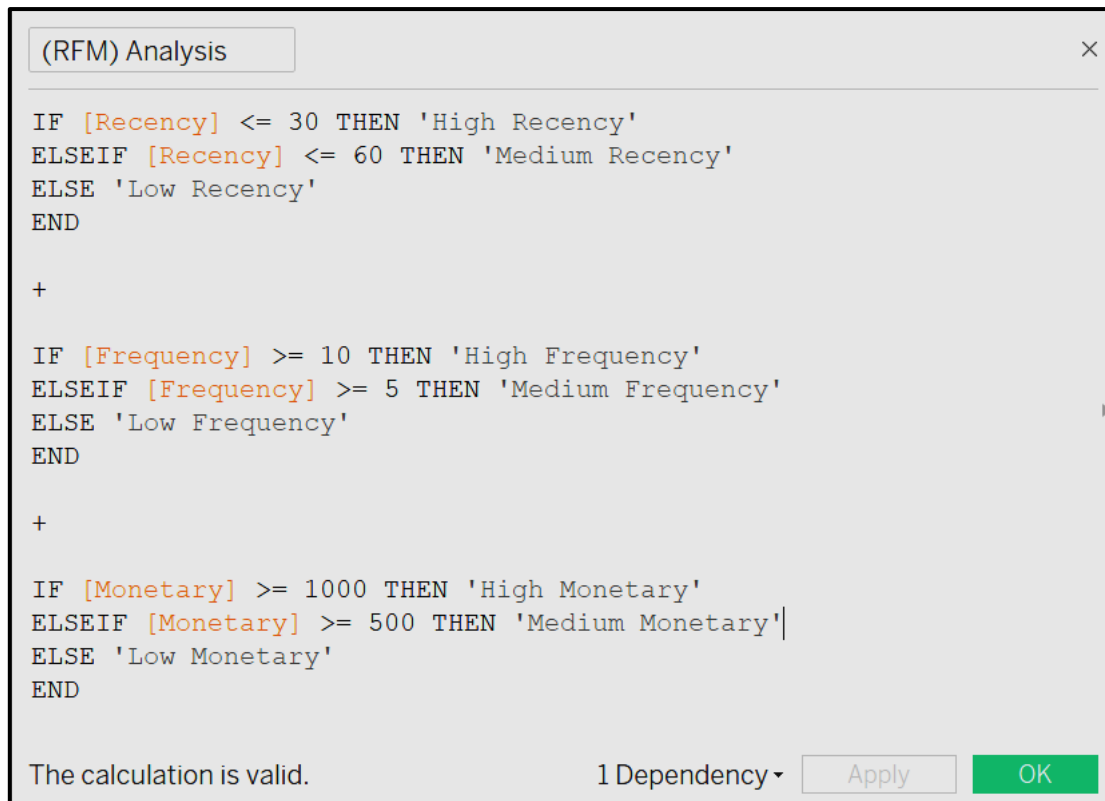
Distinct count of Customer_ID (colour) broken down by (RFM)Analysis vs. (RFM)Analysis

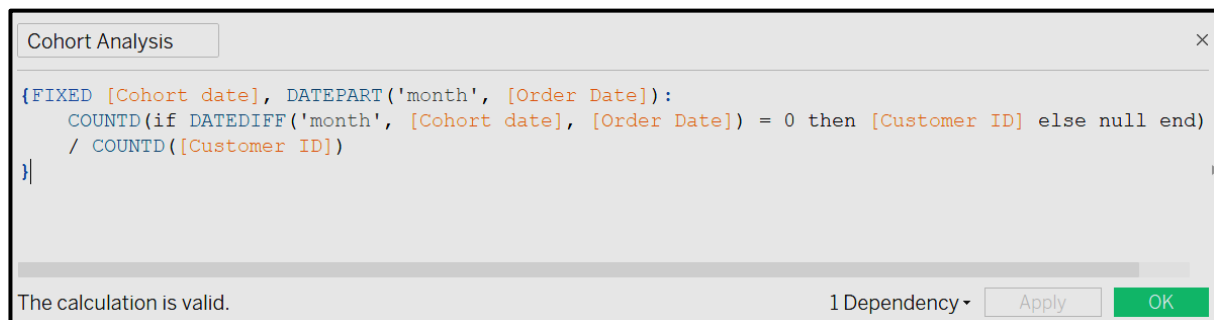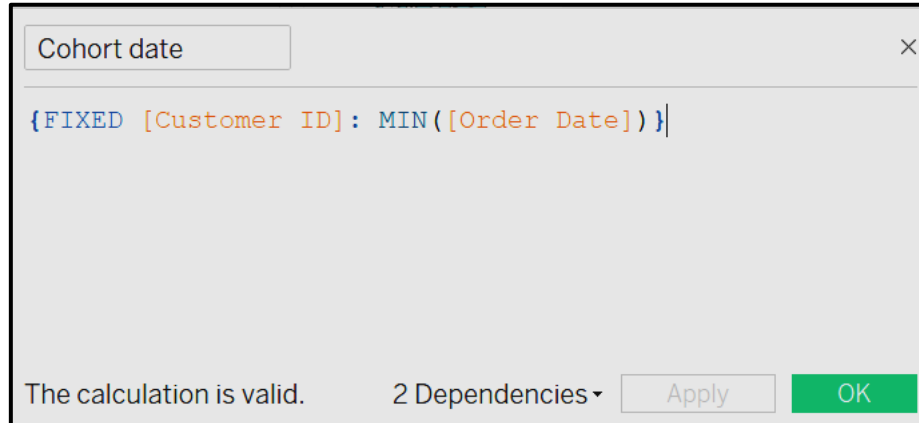# 2. Sales Contribution to Overall Growth

Creating new field Sales Contribution that analysis the ratio of sales to the Sum of sales Fixed over Product name


Sum of Sales Contribution for each ProductName. Colours shows details about Region. The view is filtered on ProductName, which has multiple members selected.

3. Cohort Analysis for Customer Retention

Creating Cohort date filed that display the order date of the first product purchased by customer.

Cohort date   ✕

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

The calculation is valid.   2 Dependencies ▾   Apply   OK

Cohort Analysis   ✕

```
{FIXED [Cohort date], DATEPART('month', [Order Date]):
    COUNTD(if DATEDIFF('month', [Cohort date], [Order Date]) = 0 then [Customer ID] else null end)
    / COUNTD([Customer ID])
}
```

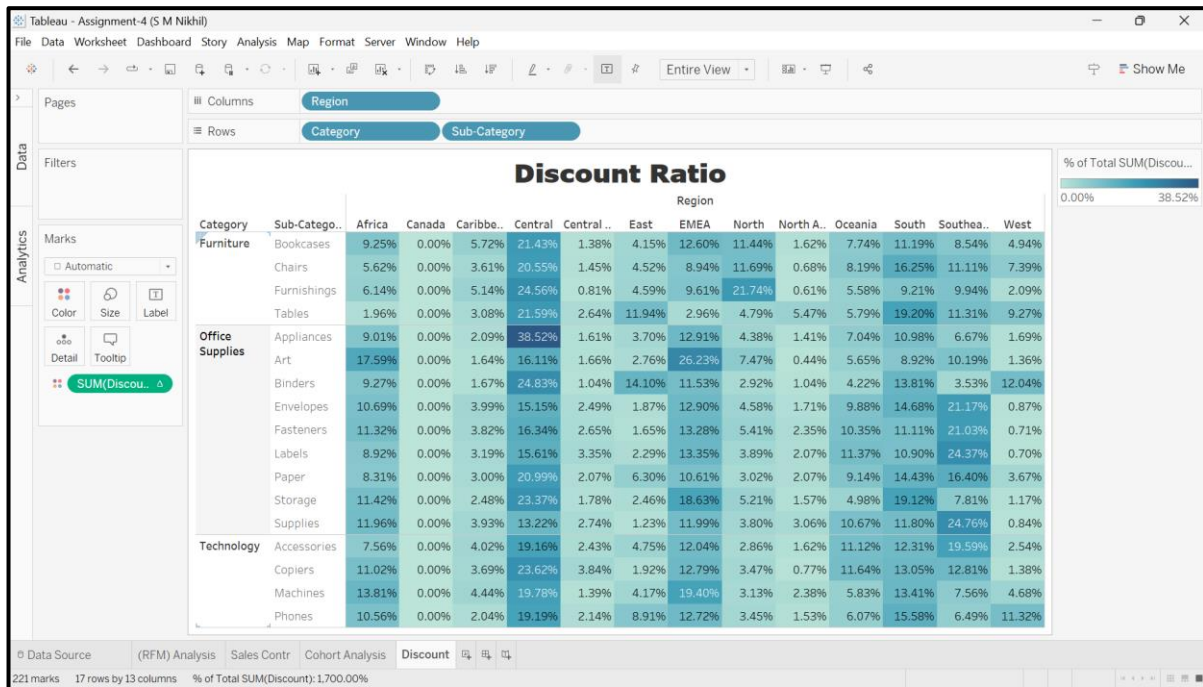The calculation is valid.   1 Dependency ▾   Apply   OK

Map based on Longitude(generated) and Latitude(generated). Colour shows sum of Cohort Analysis. Details are shown for Country.
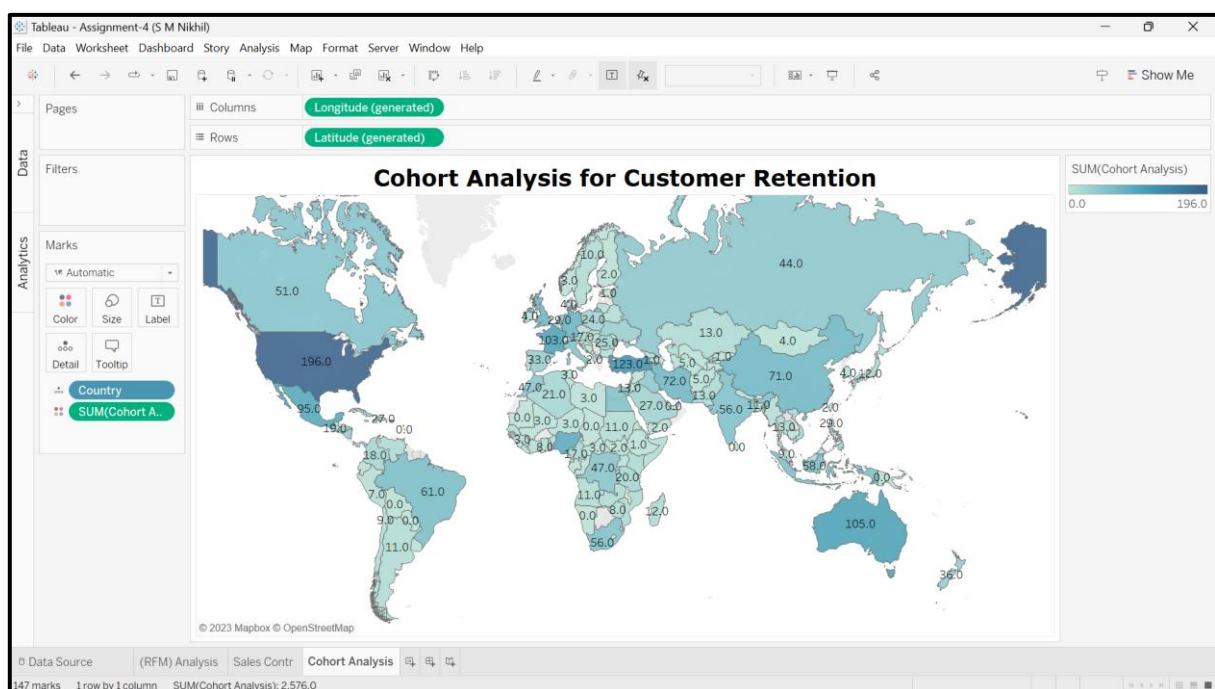
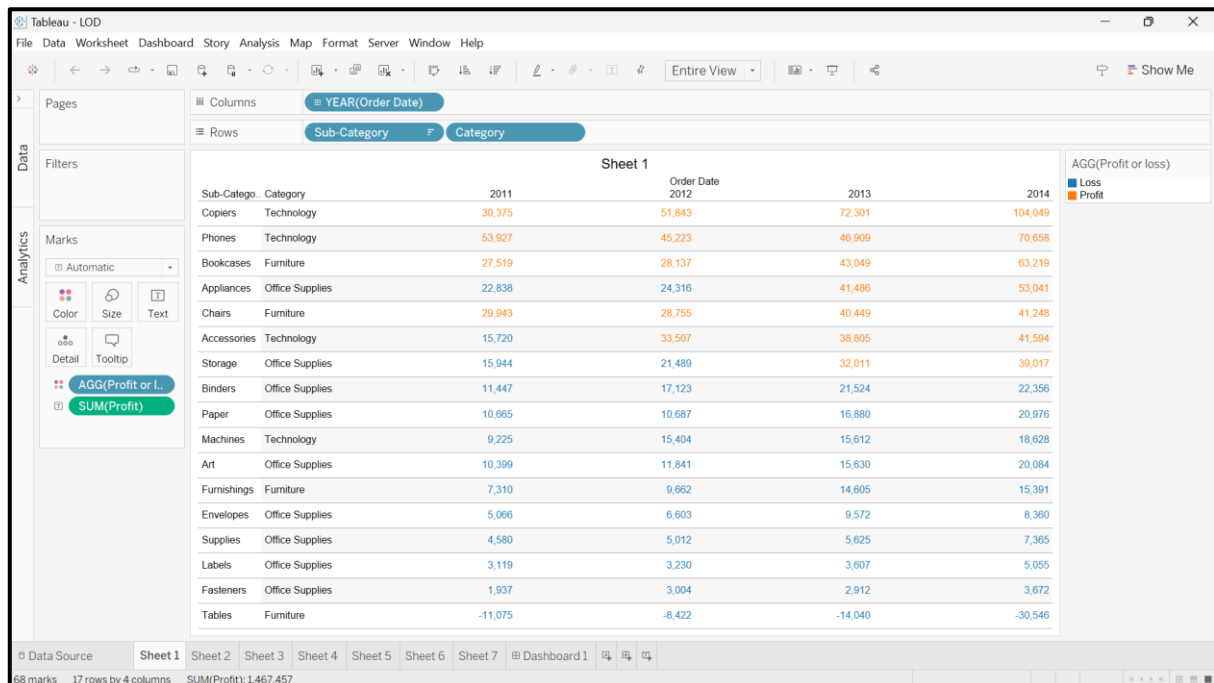# Basic Calculations

1. Discount Ratio:

% of Total Discount(color) broken down by Region vs. Category and Sub-Category.

2. Profit or Loss:

Sum of Profit broken down by Order Date Year vs. Sub-Category and Category. Colour shows details about Profit or loss.