HireArt

Simple Marketing Spreadsheet Analysis

Dataset & Packages:

Data was downloaded from **Marketing Spreadsheet** in .xlsx format. Tableau software will be used to find the insights.

Objective:

To find the month they're likely to contact the most clients, so they can schedule a product upgrade announcement. Which month does the team tend to contact the greatest percentage of its clients?

Experiments/Tasks :

- Importing Data : It is a fairly easy task when using Tableau. We will connect to a .xlsx file, which is the spreadsheet to be analyzed.
- The first look at dataset shows that there is no need for preprocessing. Now, we can proceed with next step.
- Insights: There are total 1001 entries with 35 unique clients.
- Since we need to find the month in both the problems, we will have to split the Date of Contact column. In order to do that, we change the format of Date of Contact column to string and perform a custom split using the separator '-' for all occurrences as shown in Fig.1. Name the splits as Year, Month and Day.

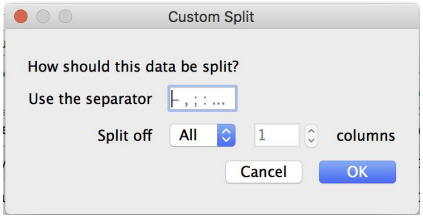


Fig.1

After the Split, Data will look like as shown below in Fig.2.

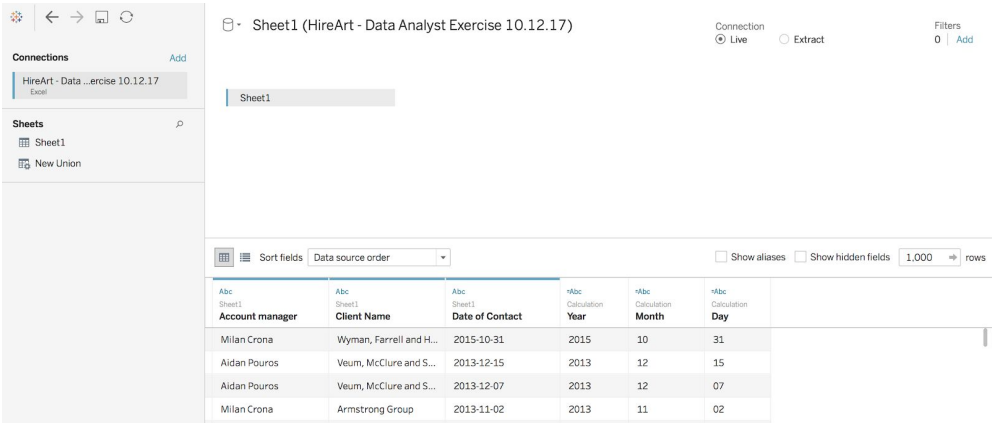


Fig.2

- To find the month they are likely to contact most clients, we plot a line graph as shown below.

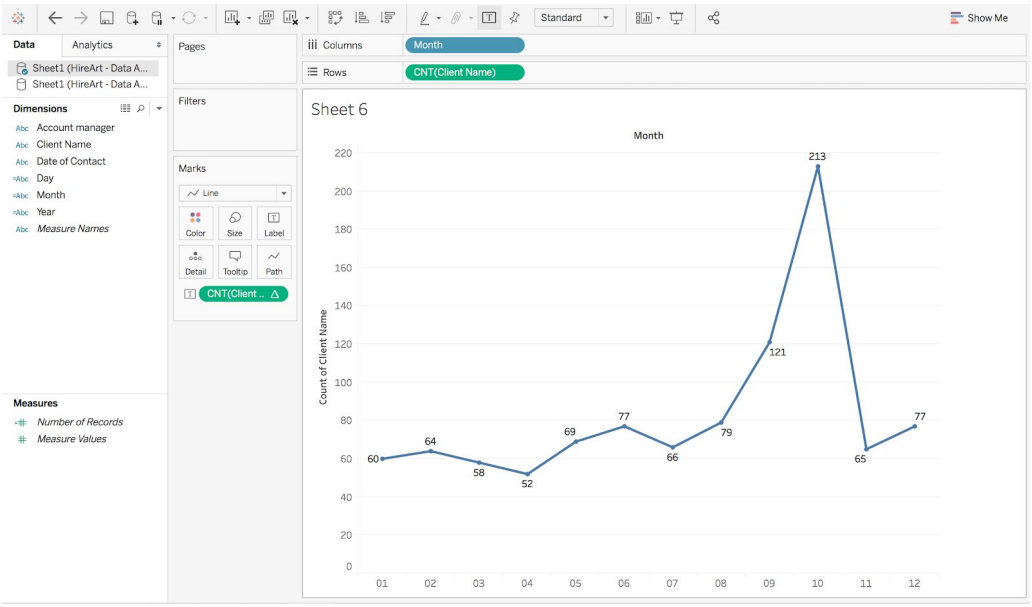


Fig.3

From Fig.3 we can say that they are most likely to contact most clients in the month of October across all 4 years. We set Client Name as label in Marks field and set quick table calculation to ‘running total’.

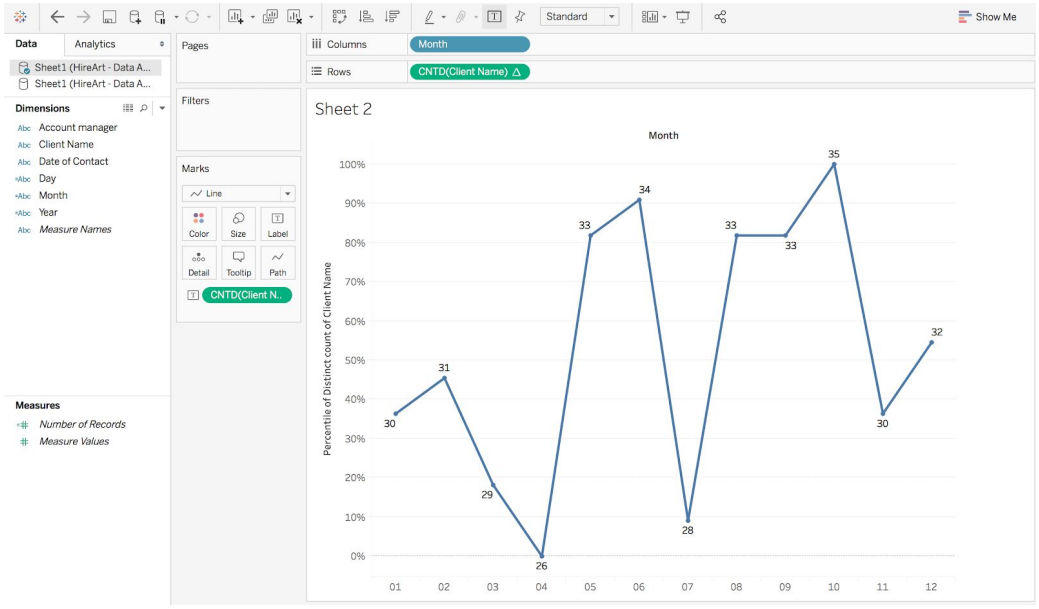


Fig.4

From Fig.4 we can say that across all 4 years, all 35 unique clients were contacted in the month of October. We specify the calculations for Client Name in row field by setting measure to 'count distinct' and quick table calculation to 'percentile'. Also we specify calculations for Client Name in Marks field where we set the field as label and set measure to 'count distinct'.

- To find the month team tends to contact greatest percentage of its clients, we plot the line graph as shown below.

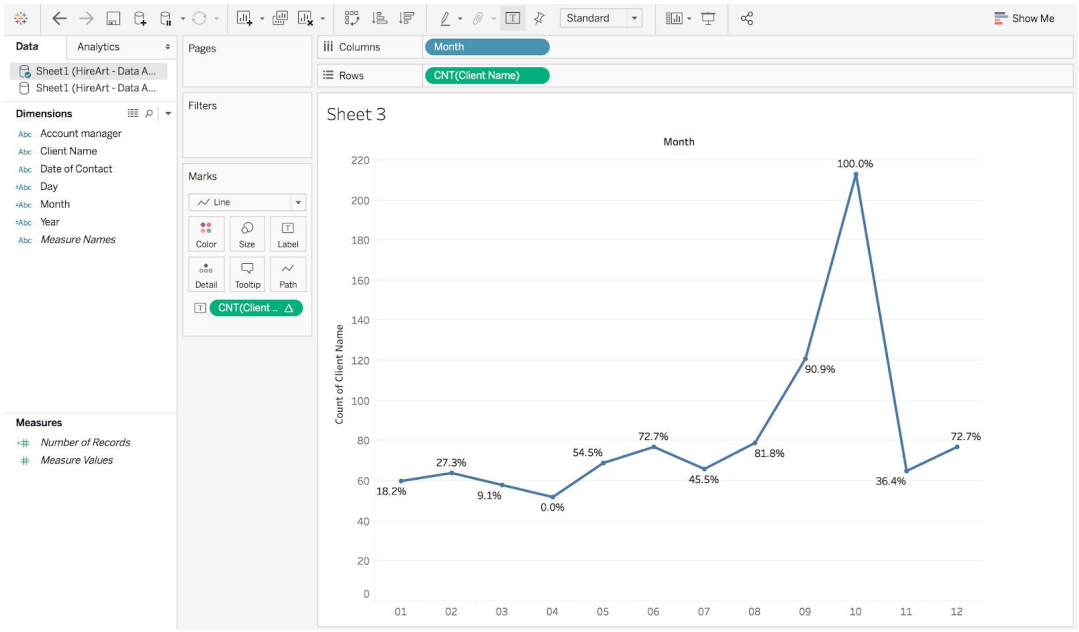


Fig.5

Fig.5 shows the required plot where we specify calculations by setting Client Name as label, quick table calculation to ‘percentile’ and measure to ‘count’. Hence we found out that the team has contacted greatest percentage of its client in the month of October.

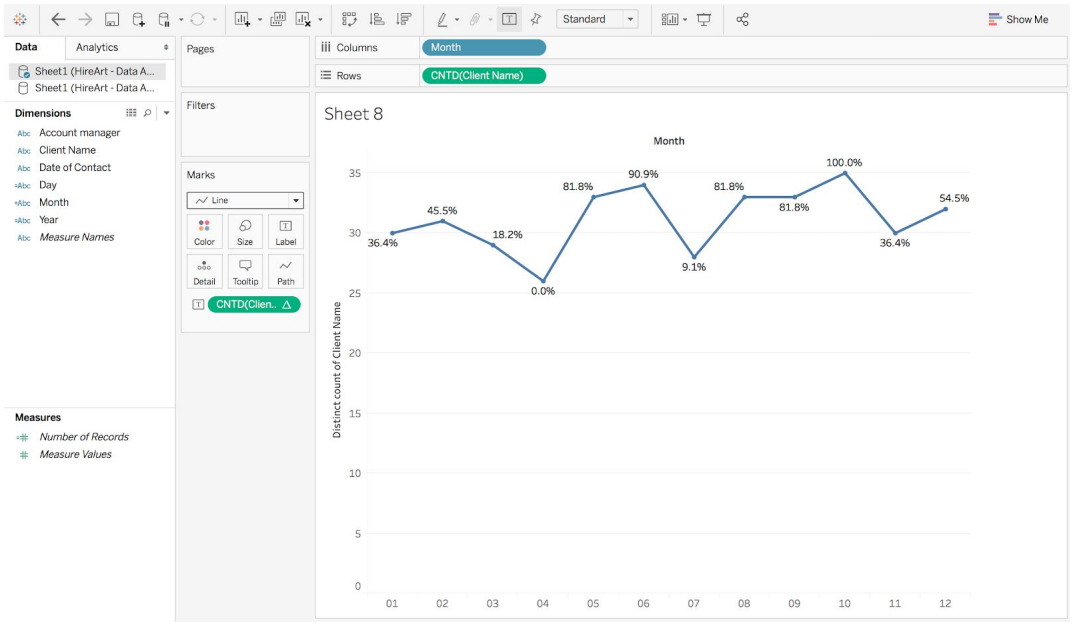


Fig.6

Fig.6 shows the plot where we considered only distinct clients to find the month in which the team contacted the greatest percentage of clients, which is October.

Conclusion:

- The marketing ops team targeted most of its clients in the month of October.
- Few other plots to better understand the trend.

In the bar plot shown in Fig.7, we try to understand what will happen if instead of targeting only month, we target both month and year. Conclusion : Across all years, most clients are contacted in the month of October.

Another interesting finding from Fig.8 is that Rigoberto White contacted highest number of clients in the month of September. The plot shows the clients contacted by each account manager.

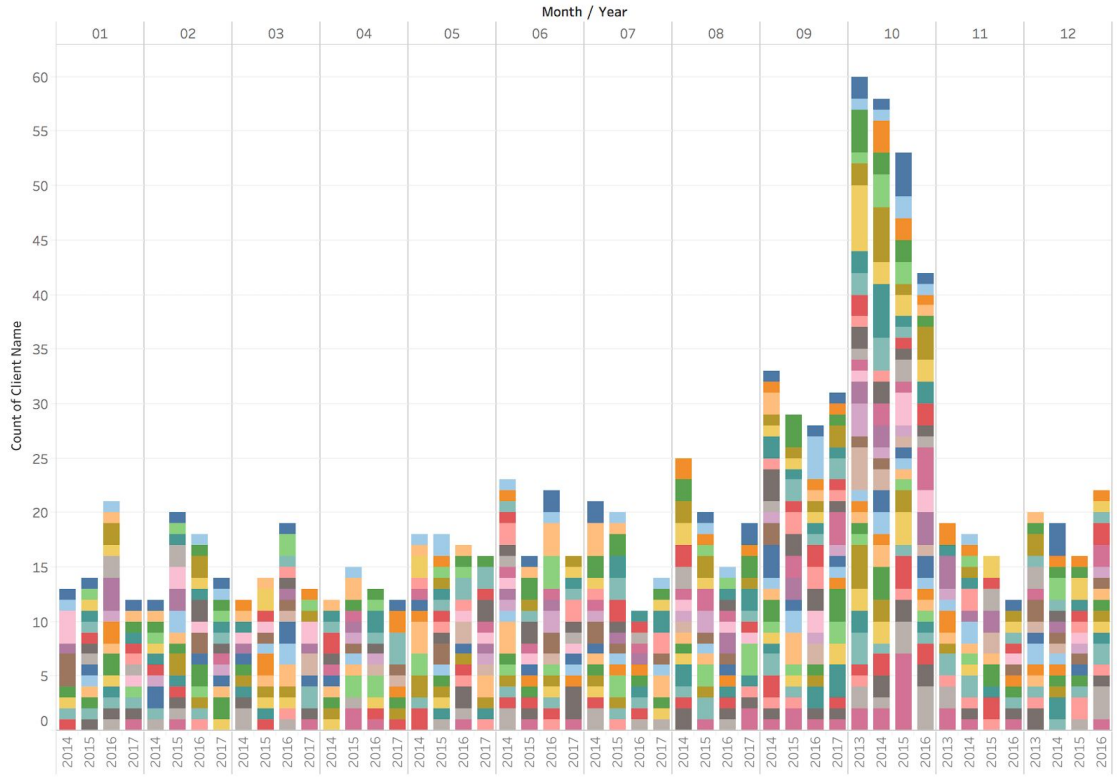
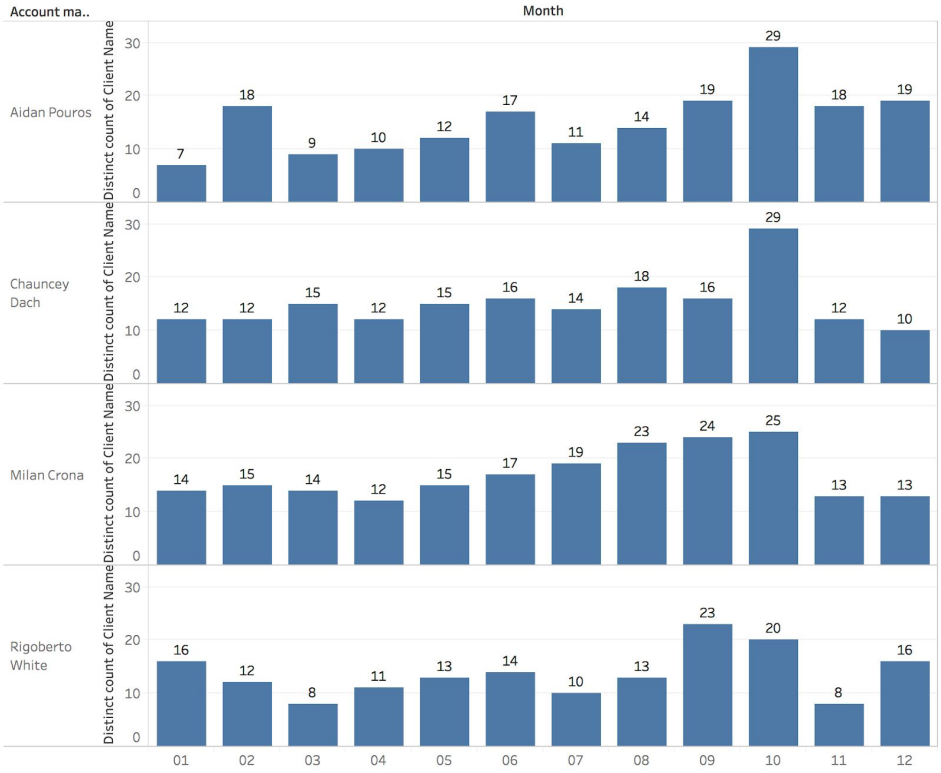

Month / Year
01
02
03
04
05
06
07
08
09
10
11
12
Count of Client Name
0
5
10
15
20
25
30
35
40
45
50
55
60
2014
2015
2016
2017
2013

Fig.7


Account ma..
Month
Aidan Pouros
Chauncey Dach
Milan Crona
Rigoberto White
Distinct count of Client Name
0
10
20
30
7
18
9
10
12
17
11
14
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29
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Fig.8