Proposal Outline

<u>Scope of Work</u>

To create an analysis of customer 'lead' cohorts and their value according to the metrics outlined below. Metrics will be compared by year and month the customer's lead was generated and trended over time.

Metrics

- Cohort Lifetime Value (LTV) – total sales (products, subscription, one-time purchases) over time.
- Value per Lead – LTV divided by number of leads purchased during that year/month.

Comparisons/Trends

- Compare month-over-month LTV.

Output

An interactive Power BI report. Simple, one-to-two-page report summarizing above metrics, allowing the report viewer to filter either to specific time periods or product tiers.

<u>Estimate of Effort</u>

- Cleanse data – identify which sales data sources will be used to correlate with customer lead cohorts.
- Identify customer cohorts – Classify leads by the year/month their profile was generated in the lead system.
- Summarize metrics by lead cohort.
- Create final report.

The scope is open to negotiation and can be adjusted to remove anything seen as non-essential. I estimate the proposed outline to take about 20 hours to complete.

<u>Compensation</u>

My contract rate is $50/hour.