Chapter 12.
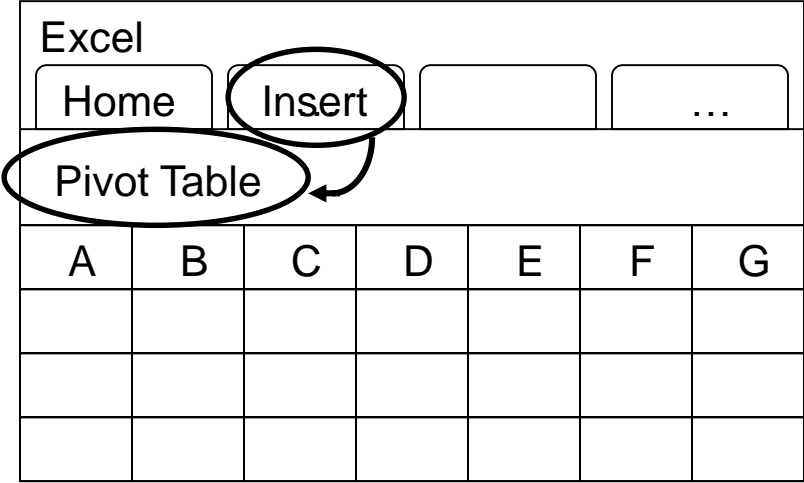# Analytics In Action:
Pivot Tables

Disclaimer:
• All images such as logos, photos, etc. used in this presentation are the property of their respective copyright owners and are used here for educational purposes only
• Some material adapted from: Sorger, Stephan. "Marketing Analytics: Strategic Models and Metrics. Admiral Press. 2013.

Pivot Tables

Name	Sales	Date of Sale	Product	Channel
Alex Alpha	$1,100	January	Product A	Store
Betty Beta	$100	February	Product B	Internet
Debbie Delta	$300	February	Product B	Store
Edie Epsilon	$200	January	Product B	Internet
Gary Gamma	$1,300	January	Product A	Store

Original Data Set

Pivot Tables

Excel						
Home	Insert			...		
Pivot Table						
A	B	C	D	E	F	G

Create Pivot Table

Choose the data set to analyze
- ⊙ Select a table or range:
  - Table Range: Sheet1:$A$1:$E$6
- ○ Use an external data source

Choose where you want the Pivot Table report
- ⊙ New Worksheet
- ○ Existing Worksheet OK

Launching Pivot Table in Excel

Pivot Tables

Pivot Table Field List

Choose fields to add to report:

☐ Customer
☐ Sales
☐ Date
☐ Product
☐ Channel

Drag fields between areas below:

Report Filter   Column Labels

Row Labels   Values

Excel's Pivot Table Field List, Based on Original Input Data Set;
Select "Sales" and "Product" to get basic table of sales by product

Pivot Tables

	A	B	C	D
1	**Row Labels** ▼	**Sum of Sales**		
2	Product A	2400		
3	Product B	600		
4	**Grand Total**	**3000**		
5				
6				
7				
8				
9				
10				
11				
12				

Pivot Table Field List

Choose fields to add to report:

- ☐ Customer
- ☒ Sales
- ☐ Date
- ☒ Product
- ☐ Channel

Drag fields between areas below:

Report Filter

Column Labels

Row Labels

Product

Values

Sum of Sales

Pivot Tables: Basic Report: Sales by Product; → Select "Date" to see how sales vary over time

Pivot Table

	A	B	C	D
1	**Row Labels** ▼	**Sum of Sales**		
2	**Product A**	**2400**		
3	January	2400		
4	**Product B**	**600**		
5	January	200		
6	February	400		
7	**Grand Total**	**3000**		
8				
9				
10				
11				
12				

Pivot Tables: Sales by Product and Date
Select "Channel" to see how sales vary with type of Distribution Channel (store)

Pivot Table Field List

Choose fields to add to report:

- ☐ Customer
- ☒ Sales
- ☒ Date
- ☒ Product
- ☐ Channel

Drag fields between areas below:

Report Filter	Column Labels

Row Labels	Values
Product Date	Sum of Sales

Pivot Table

	A	B	C	D
1	**Row Labels** ▼	**Sum of Sales**		
2	**Product A**	**2400**		
3	**January**	**2400**		
4	Retail Store	2400		
5	**Product B**	**600**		
6	**January**	**200**		
7	Internet	200		
8	**February**	**400**		
9	Internet	100		
10	Retail Store	300		
11	**Grand Total**	**3000**		
12				

Pivot Table Field List

Choose fields to add to report:

- [ ] Customer
- [x] Sales
- [x] Date
- [x] Product
- [x] Channel

Drag fields between areas below:

Report Filter	Column Labels

Row Labels	Values
Product Date	Sum of Sales

Pivot Tables: Sales by Product, Date, and Channel (Added Date, and then Channel)
What if we had added Channel, and then Date?

Pivot Table

	A	B	C	D
1	**Row Labels** ▼	**Sum of Sales**		
2	**Product A**	**2400**		
3	**Retail Store**	**2400**		
4	January	2400		
5	**Product B**	**600**		
6	**Internet**	**300**		
7	January	200		
8	February	100		
9	**Retail Store**	**300**		
10	February	300		
11	**Grand Total**	**3000**		
12				

Pivot Table Field List

Choose fields to add to report:

- ☐ Customer
- ☒ Sales
- ☒ Date
- ☒ Product
- ☒ Channel

Drag fields between areas below:

Report Filter

Column Labels

Row Labels

Product
Date

Values

Sum of Sales

Pivot Tables: Sales by Product, Date, and Channel (Added Channel, and then Date)

Pivot Table

	A	B	C	D
1	**Row Labels** ▼	**Sum of Sales**		
2	**Product A**	**2400**		
3	January	2400		
4	**Product B**	**600**		
5	January	200		
6	February	400		
7	**Grand Total**	**3000**		
8				
9				
10				
11				
12				

Adding Field to Report Filter

Pivot Table Field List

Choose fields to add to report:

- ☐ Customer
- ☒ Sales
- ☒ Date
- ☒ Product
- ☐ Channel

▽ Add to Report Filter

Drag fields between areas below:

Report Filter

Column Labels

Row Labels
Product
Date

Values
Sum of Sales

Pivot Table

	A	B	C	D

Channel   (All)

- (All)
- Internet
- Retail Store

[OK]

11

12

Pivot Table Field List

Choose fields to add to report:

- ☐ Customer
- ☒ Sales
- ☒ Date
- ☒ Product
- ☒ Channel

Drag fields between areas below:

Report Filter   **Column Labels**

Channel		

Row Labels   **Values**

Product	Sum of Sales
Date	

Selecting Reports using Report Filter

Pivot Table

	A	B	C	D
1	**Sum of Sales**	**Column Labels** ▼		
2	**Row Labels** ▼	**Internet**	**Retail Store**	**Grand Total**
3	**Product A**		**2400**	**2400**
4	January		2400	2400
5	**Product B**	**300**	**300**	**600**
6	January	200		200
7	February	100	300	400
8	**Grand Total**	**300**	**2700**	**3000**
9				
10				
11				
12				

Pivot Table Field List

Choose fields to add to report:

- ☐ Customer
- ☒ Sales
- ☒ Date
- ☒ Product
- ☒ Channel

Drag fields between areas below:

Report Filter	Column Labels
	Channel

Row Labels	Values
Product Date	Sum of Sales

Pivoting Pivot Tables: Transposing from Columns to Rows