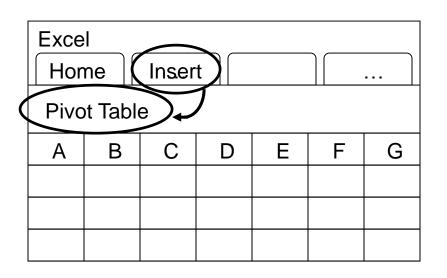
Chapter 12. Analytics In Action: Pivot Tables

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- Some material adapted from: Sorger, Stephan. "Marketing Analytics: Strategic Models and Metrics. Admiral Press. 2013.
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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



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					
O Existing Worksheet OK					

Launching Pivot Table in Excel

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Pivot Table Field List				
Choose fields to add to report: Customer Sales Date Product Channel				
□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□	een 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

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	А	В	С	D	Pivot Table Field List
1	Row Labels	Sum of Sales			Choose fields to add to report:
2	Product A	2400			
3	Product B	600			☐ Customer x Sales
4	Grand Total	3000			☐ Date
5					x Product
6					☐ Channel
7					Drag fields between areas below.
8					Drag fields between areas below:
9					Report Filter Column Labels
10					David abala Values
11					Row Labels Values Product Sum of Sales
12					

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

Α	В	С	D	Pivot Table Field List
Row Labels	Sum of Sales			Change fields to add to reports
Product A	2400			Choose fields to add to report:
January	2400			☐ Customer ☐ Sales
Product B	600			x Date
January	200			x Product
February	400			☐ Channel
Grand Total	3000			Drog fields between eress below
				Drag fields between areas below:
				Report Filter Column Labels
				Row Labels Values
				Product Sum of Sales
				Date
	Product A January Product B January February Grand Total	Row Labels Product A January Product B January February Grand Total Public Sum of Sales 2400 2400 2400 400 3000	Row Labels Sum of Sales Product A 2400 January 2400 Product B 600 January 200 February 400 Grand Total 3000	Row Labels▼ Sum of SalesProduct A2400January2400Product B600January200February400

Select "Channel" to see how sales vary with type of Distribution Channel (store)

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А	В	С	D	Pivot Table Field List
Row Labels	Sum of Sales			
Product A	2400			Choose fields to add to report:
January	2400			☐ Customer x Sales
Retail Store	2400			x Date
Product B	600			x Product
January	200			X Channel
Internet	200			
February	400			Drag fields between areas below:
Internet	100			Report Filter Column Labels
Retail Store	300			David shale Values
Grand Total	3000			Row Labels Values Product Sum of Sales
				Date
	Product A January Retail Store Product B January Internet February Internet Retail Store	Row Labels ▼ Sum of Sales Product A 2400 January 2400 Retail Store 2400 Product B 600 January 200 Internet 200 February 400 Internet 100 Retail Store 300	Row Labels Product A January Retail Store Product B January Internet Internet Internet Retail Store Retail Store Retail Store Retail Store Retail Store Retail Store Retail Store Retail Store Retail Store Retail Store Retail Store	Row Labels Sum of Sales Product A 2400 January 2400 Retail Store 2400 Product B 600 January 200 Internet 200 February 400 Internet 100 Retail Store 300 Retail Store 300

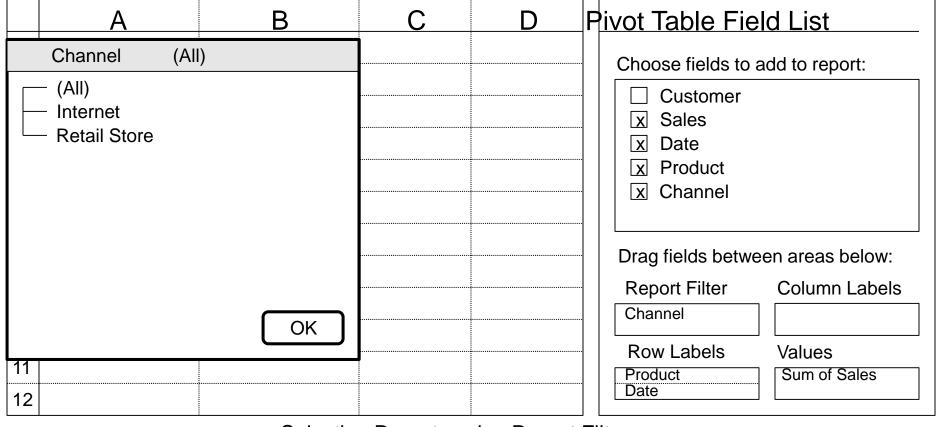
What if we had added Channel, and then Date?

	Α	В	С	D	Pivot Table Field List
1	Row Labels	Sum of Sales			Change fields to add to report
2	Product A	2400			Choose fields to add to report:
3	Retail Store	2400			·
4	January	2400			x Date
5	Product B	600			☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
6	Internet	300			Channel
7	January	200			Described by the second of the land
8	February	100			Drag fields between areas below:
9	Retail Store	300			Report Filter Column Labels
10	February	300			David shale Values
11	Grand Total	3000			Row Labels Values Product Sum of Sales
12					Date

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

	А	В	С	D	Pivot Table Field List
1	Row Labels	Sum of Sales			Chassa fields to add to report:
2	Product A	2400			Choose fields to add to report:
3	January	2400			Customer
4	Product B	600			x Date
5	January	200			x Product
6	February	400			Channel
7	Grand Total	3000			Add to Report Filter
8					Drag fields between areas below:
9					Report Filter Column Labels
10					
11					Row Labels Values Product Sum of Sales
12					Date

Adding Field to Report Filter



Selecting Reports using Report Filter

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	А	В	С	D	Pivot Table Field List
1	Sum of Sales	Column Labels			Choose fields to add to report:
2	Row Labels ▼	Internet	Retail Store	Grand Total	
3	Product A		2400	2400	x Sales
4	January		2400	2400	x Date
5	Product B	300	300	600	x Product
6	January	200		200	X Channel
7	February	100	300	400	Drag fields between areas below.
8	Grand Total	300	2700	3000	Drag fields between areas below:
9					Report Filter Column Labels Channel
10					Row Labels Values
11					Product Sum of Sales
12					Date

Pivoting Pivot Tables: Transposing from Columns to Rows