REAL-TIME BUSINESS
DASHBOARDS

p5

30 KEY BUSINESS METRICS TO MONITOR

CUSTOMER METRICS

- Standard Customer Metrics
- Audience Trends
- Cohort Performance – By Engagement, Purchases and Attrition
- Support KPIs
- Resolution KPIs
- Engagement KPIs
- Satisfaction KPIs
- By Geography
- By Customer Lifetime Value
- By Customer Profitability

PRODUCT METRICS

- Standard Product Metrics
- Products Sold
- Product Performance – By Conversion and Satisfaction
- Category-wise Products Sold
- Category-wise Product Effectiveness
- Category-wise Demand Supply Ratio

CONVERSION & ROI METRICS

- Standard Conversion Metrics
- Total Conversions
- Conversions By All Channels

REVENUE METRICS

- Standard Revenue Metrics
- Total Revenues
- Revenues by Campaign
- Revenues by First Purchase
- Revenues by Repeat Purchase
- Revenues by Geography

SPEND METRICS

- Standard Spend Metrics
- Spends by Conversion Stages
- Spends by Campaign
- Revenues by Channels
- Revenues by Geography

1 Global Metrics – Real-time View of Total Customers , Total Revenue and Total Spends for the Period

| Period: Half Year ▼ | Current ▼ | Choose Segment ▼ |

| ▲ 25% | TOTAL NEW CUSTOMERS 5678 | ▲ 8% | TOTAL REVENUE $6,720,356 | ▼ 3% | TOTAL SPENDS $365,000 |

With Filter Features

| Period: Half Year ▼ | Current ▼ | Choose Segment ▼ |

Period: Week
Period: Month
Period: Quarter
Period: Half Year
Period: Annual
Period: Customize your time period

Current
Predict

Choose Segment
Aware
High Intent
Prospect Segment1
Prospect Segment 2
Prospect Segment 3
Customer Segment 1
Customer Segment 2
Customer Segment 3

▼ 3% | TOTAL SPE $365

By time period

Show Current or Predict Future Trends

By custom segment

TOTAL AUDIENCE ▼ 25%
1,211,491

TOTAL CUSTOMERS ▼ 26%
11,982

TOTAL PROSPECTS ▼ 27%
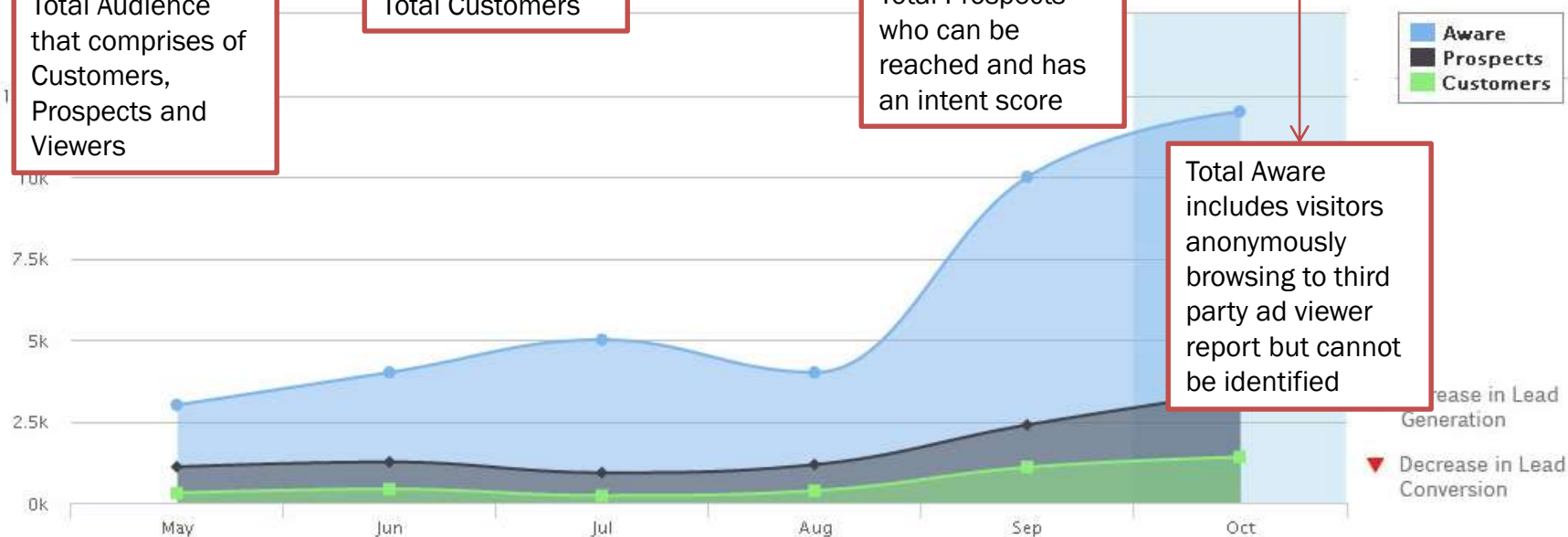47,509

TOTAL AWARE ▲ 22%
1,152,000

AUDIENCE VIEW

Total Audience that comprises of Customers, Prospects and Viewers

Total Customers

Total Prospects who can be reached and has an intent score

Total Aware includes visitors anonymously browsing to third party ad viewer report but cannot be identified

Legend:
- Aware
- Prospects
- Customers

y-axis: 10k, 7.5k, 5k, 2.5k, 0k

x-axis: May, Jun, Jul, Aug, Sep, Oct

...rease in Lead Generation
▼ Decrease in Lead Conversion

CUSTOMER COHORT PERFORMANCE

ENGAGEMENT PURCHASES ATTRITION

TOTAL AUDIENCE ▼ 25%
1,211,491

TOTAL CUSTOMERS ▼ 26%
11,982

TOTAL PROSPECTS ▼ 27%
47,509

TOTAL AWARE ▲ 22%
1,152,000

Performance over Last period

AUDIENCE VIEW

Derived Insights

Legend:
- Aware
- Prospects
- Customers

▲ Increase in Lead Generation

▼ Decrease in Lead Conversion

Y-axis: 15k, 12.5k, 10k, 7.5k, 5k, 2.5k, 0k

X-axis: May, Jun, Jul, Aug, Sep, Oct

Derived Insights

CUSTOMER COHORT PERFORMANCE

ENGAGEMENT   PURCHASES   ATTRITION

CUSTOMER COHORT PERFORMANCE ≡

ENGAGEMENT | PURCHASES | ATTRITION

COHORTS	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6
MAY	34	34	40	77	126	144
JUN	37	127	68	146	89	
JUL	61	33	131	141		
AUG	36	60	127			
SEP	40	63				
OCT	59					

Scale: 0 — 25 — 50 — 75 — 100 — 125 — 150

Cohort Report of the select period based on engagement

Cohort Report of the select period based on transactions

Cohort Report of the select period based on customer churn

...OGRAPHY ≡

CUSTOMERS BY ZONE

100
75
50

200

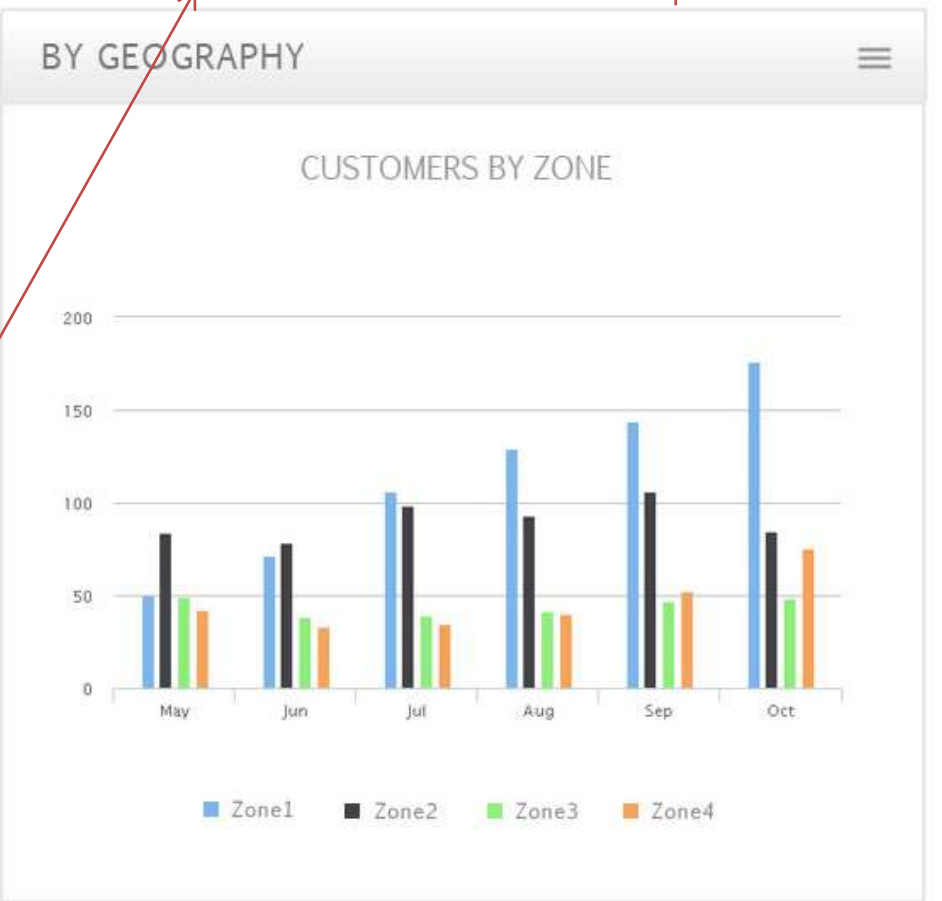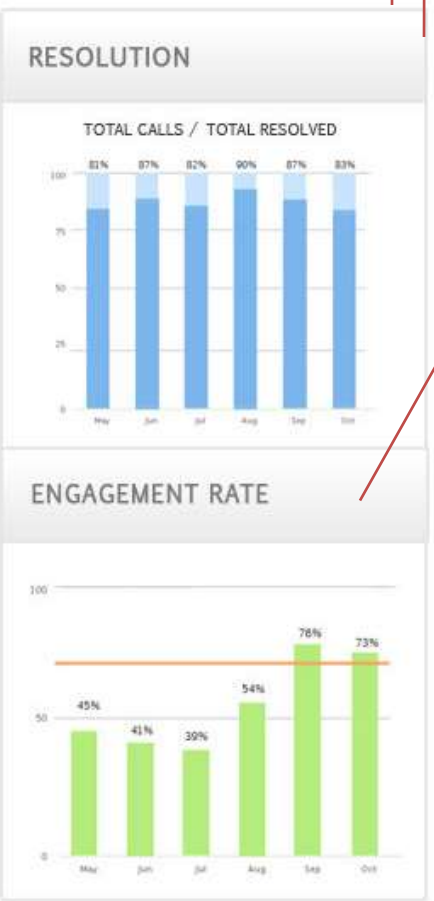| SEP	40	63				

100
125
150
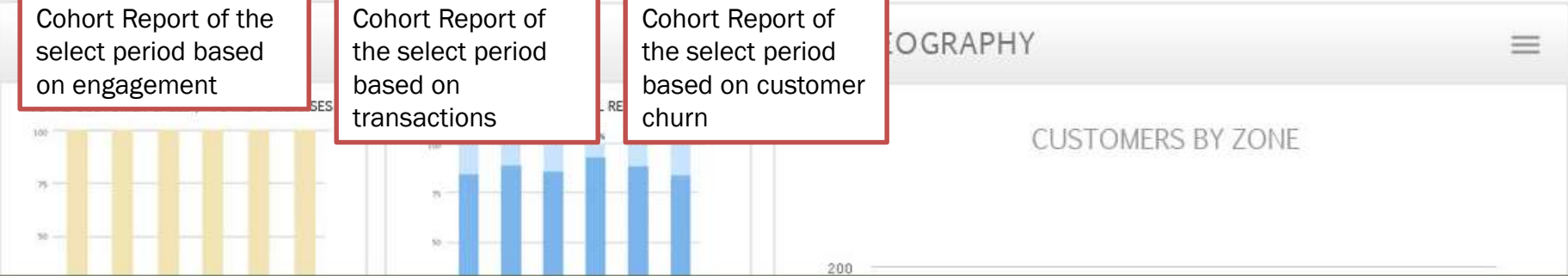
Overall Customer Satisfaction Rate for a specific period

Total Customer Support Call% for a specific period

Total Calls, Resolves and FCRs

Overall Customer Engagement Rate for a specific period

Customers by Region/Zone

CUSTOMER SUPPORT

TOTAL CUSTOMER CALLS / TOTAL PURCHASES

RESOLUTION

TOTAL CALLS / TOTAL RESOLVED

BY GEOGRAPHY

CUSTOMERS BY ZONE

SATISFACTION RATE

ENGAGEMENT RATE

■ Zone1   ■ Zone2   ■ Zone3   ■ Zone4

TOTAL PRODUCTS SOLD ▼ 5%
33,605

UNIQUE PRODUCTS SOLD ▲ 2%
224

AVG CONVERSION RATE ▲ 3%
12%

AVG SATISFACTION SCORE ▲ 8%
21%

PRODUCTS SOLD

≡

Total Products across all categories

Total Unique Product Types Sold

TAL

25000

20000   20943

15000   14657

12215

10000   9560

8493   9239

5000

0

May   Jun   Jul   Aug   Sep   Oct

PRODUCT PERFORMANCE

≡

RSION   SATISFACTION

Average Conversion Rate of all products for a specific period

Average Satisfaction Rate of all products for a specific period

30   28%

24

18

12   9%

8%   6%   7%

6

67%   69%   72%   83%   82%   73%

0

May   Jun   Jul   Aug   Sep   Oct

BY CATEGORY

CATEGORY 1

TOTAL PRODUCTS SOLD 5%
33,605

UNIQUE PRODUCTS SOLD 2%
224

AVG CONVERSION RATE 3%
12%

AVG SATISFACTION SCORE 8%
21%

PRODUCTS SOLD
TOTAL UNIQUE

PRODUCT PERFORMANCE
CONVERSION SATISFACTION
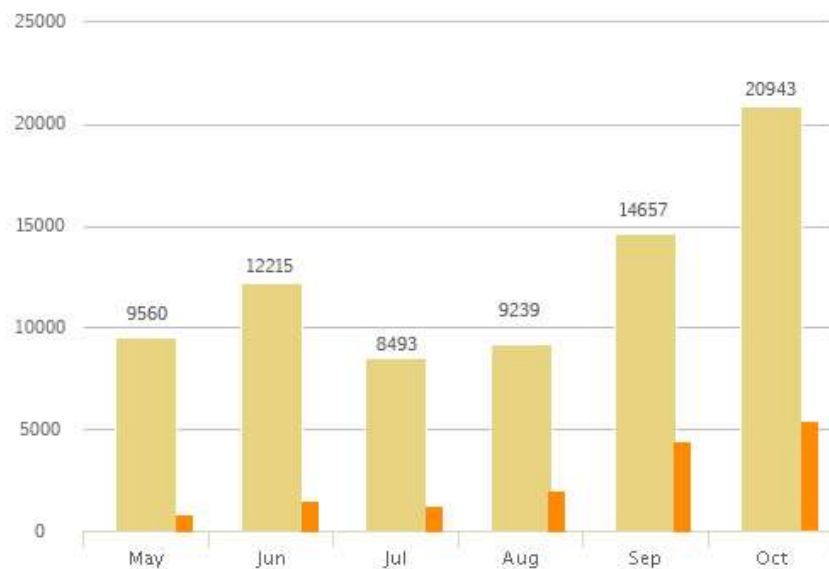
Total Product Sold
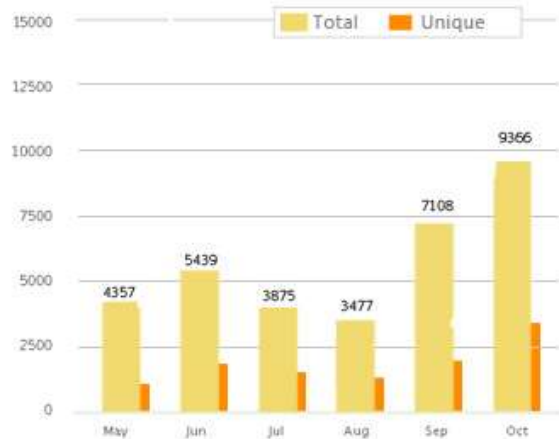An overview to understand total unit sales and an understanding if more unique products were sold
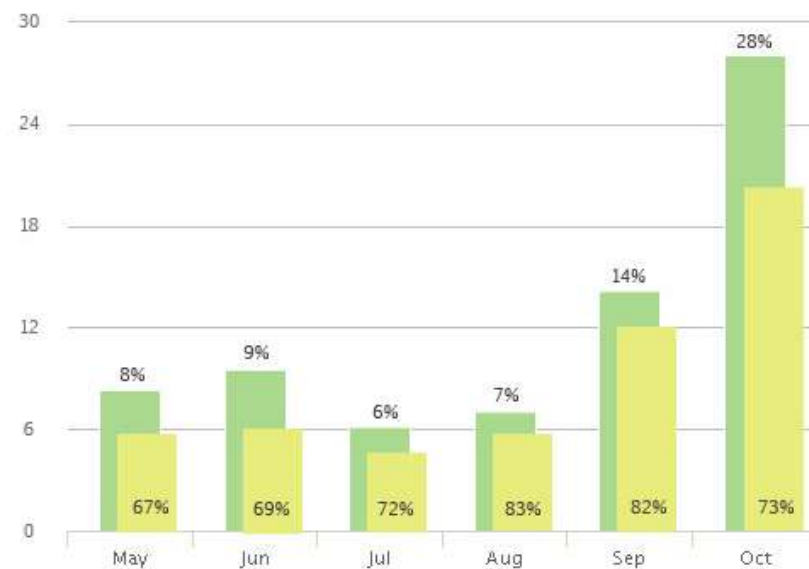
Product Performance
An overview to understand the generic performance of the products over a period of time with a customer satisfaction comparitive

| CUSTOMERS | **PRODUCTS** | CONVERSIONS | REVENUES | SPENDS |

BY CATEGORY

CATEGORY 1

PRODUCTS SOLD ▲ 14%

Total Unique

15000
12500 9366
10000
7500 7108
5439
5000 4357 3875 3477
2500
0
May Jun Jul Aug Sep Oct

PRODUCT EFFECTIVENESS ▼ 3%

Conversions Satisfied

18
15 16%
12 12%
9 9% 7%
7% 6%
6
3 57% 64% 53% 71% 65% 54%
0
May Jun Jul Aug Sep Oct

DEMAND SUPPLY RATIO ▲ 22%

Supplies
Requests

15000
12500
10000
7500
5000
2500
0
May Jun Jul Aug Sep Oct
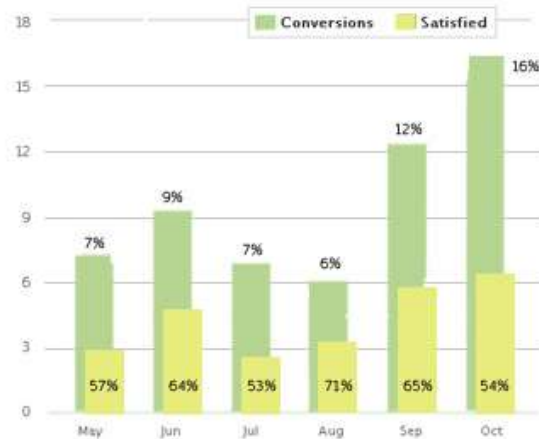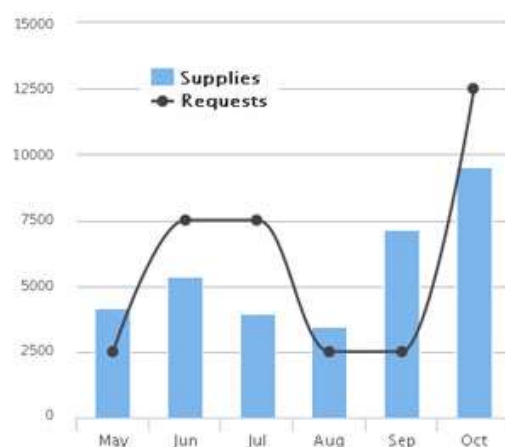
A quick view to understand product volume sold for a particular category for a specific period

A quick view to understand how many customers are satisfied within a particular category for a specific period for a specific period

A quick view to understand the gap between demand and supply within a particular category for a specific period
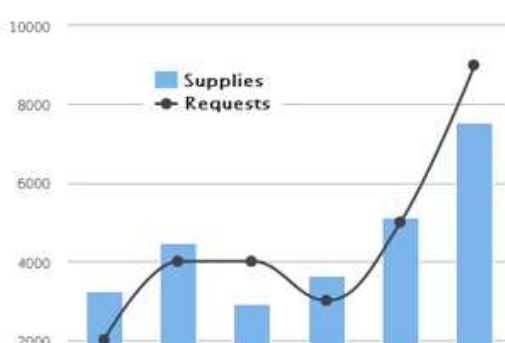
PR ▲ 6%

Total Unique

10000
8000 7805
6000
5314
4000 4698 3901
3650 3078
2000

▲ 16%

Conversions Satisfied

25 23%
20
16%
15 13%
10% 11%
10 8%
5

DEMAND SUPPLY RATIO ▼ 4%

Supplies
Requests

10000
8000
6000
4000
2000

TOTAL CONVERSIONS
24700
▲ 15%

PROSPECT CONV
19022
▲ 22%

CUSTOMER CONV
5678
▲ 7%

REPEAT CONV
2119
▲ 12%

TOTAL CONVERSIONS

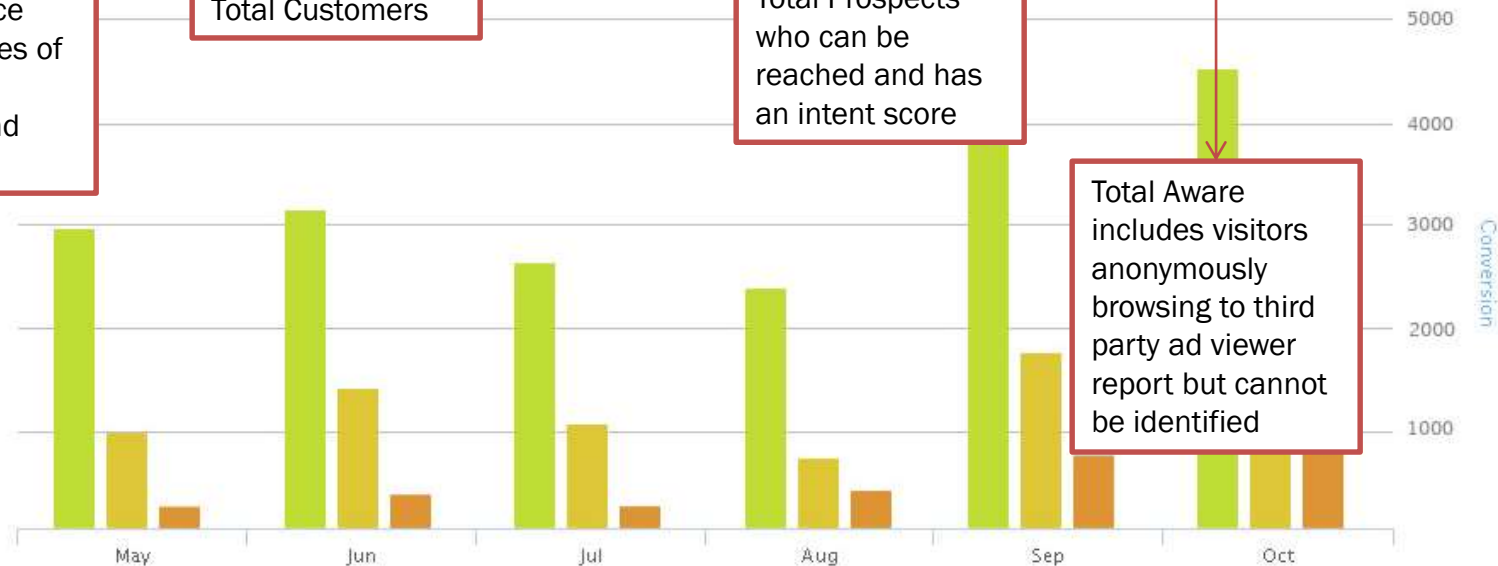Legend:
- prospects
- new customers
- re...

Total Audience that comprises of Customers, Prospects and Viewers

Total Customers

Total Prospects who can be reached and has an intent score

Total Aware includes visitors anonymously browsing to third party ad viewer report but cannot be identified

Conversion

5000
4000
3000
2000
1000

May   Jun   Jul   Aug   Sep   Oct

BY CHANNELS

GOOGLE ADS (PAID)
▼ 7%
2.25   5

FACEBOOK (PAID)
▲ 15%
5   5

LINKEDIN (PAID)
▲ 16%
5   5

EMAIL
▲ 19%
7   6

TOTAL CONVERSIONS ▲ 15%
24700

PROSPECT CONV ▲ 22%
19022

CUSTOMER CONV ▲ 7%
5678

REPEAT CONV ▲ 12%
2119

TOTAL CONVERSIONS

- prospects
- new customers
- repeat customers
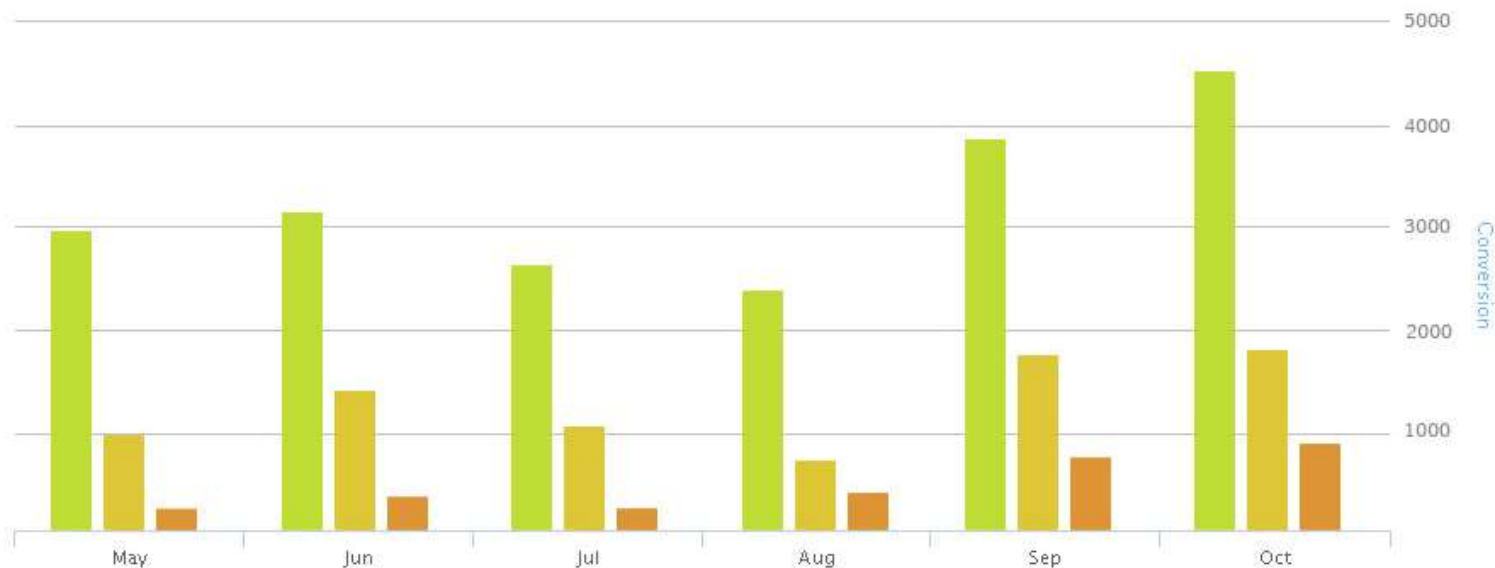
Total Conversions
A view to know how many converted to prospects; made their first purchase; and repeat purchases

May   Jun   Jul   Aug   Sep   Oct

Conversion

BY CHANNELS

GOOGLE ADS (PAID) ▼ 7%
2.25   3

FACEBOOK (PAID) ▲ 15%
5   5

LINKEDIN (PAID) ▲ 16%
5   5

EMAIL ▲ 19%
7   6

BY CHANNELS

GOOGLE ADS (PAID) ▼
7%

- Conversion Rate
- Attribution

FACEBOOK (PAID) ▲
15%

- Conversion Rate
- Attribution

LINKEDIN (PAID) ▲
16%

- Conversion Rate
- Attribution

EMAIL ▲
19%

- Conversion Rate
- Attribution

AFFILIATE ▲
6%

- Conversion Rate
- Attribution

MOBILE ▲
11%

- Conversion Rate
- Attribution

OUTBOUND ▲
4%
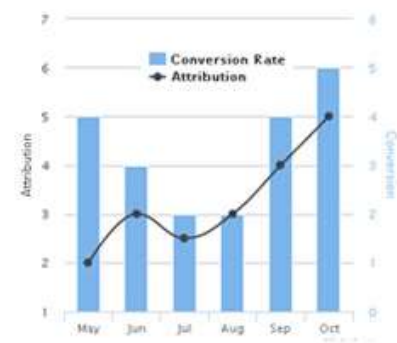
- Conversion Rate
- Attribution
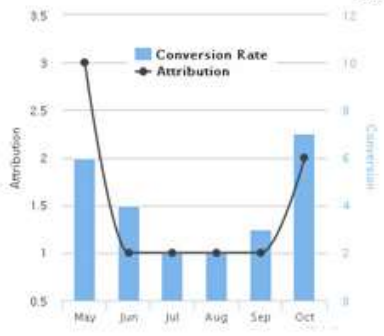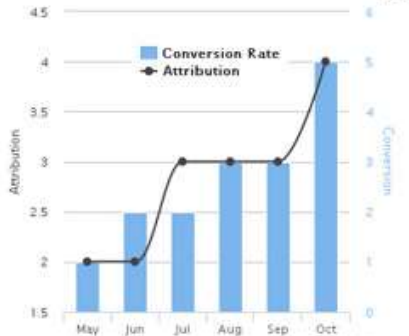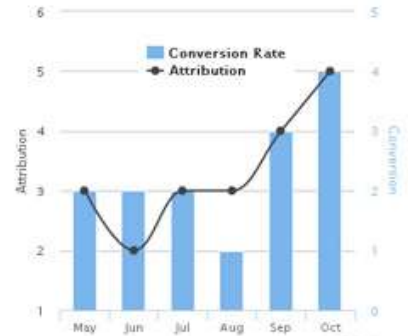
EVENTS ▲
3%
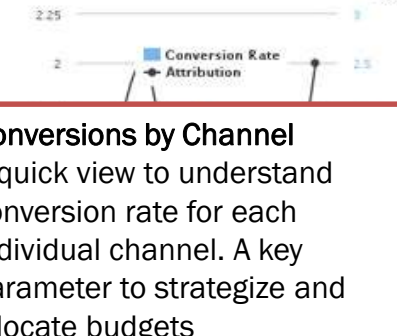
- Conversion Rate
- Attribution

Conversions by Channel
A quick view to understand conversion rate for each individual channel. A key parameter to strategize and allocate budgets

PRINT ▼
11%

- Conversion Rate
- Attribution

TV ▼
2%

- Conversion Rate
- Attribution

BTL ▼
3%

- Conversion Rate
- Attribution

TOTAL REVENUES ▼ 25%
$6,720,356

OFFLINE SALES ▼ 26%
$3,091,364

ONLINE SALES ▼ 27%
$1,478,478

PARTNER SALES ▲ 22%
$2,150,514

TOTAL REVENUES

Total Revenues across all revenue models. In this case, it has offline, online and partner
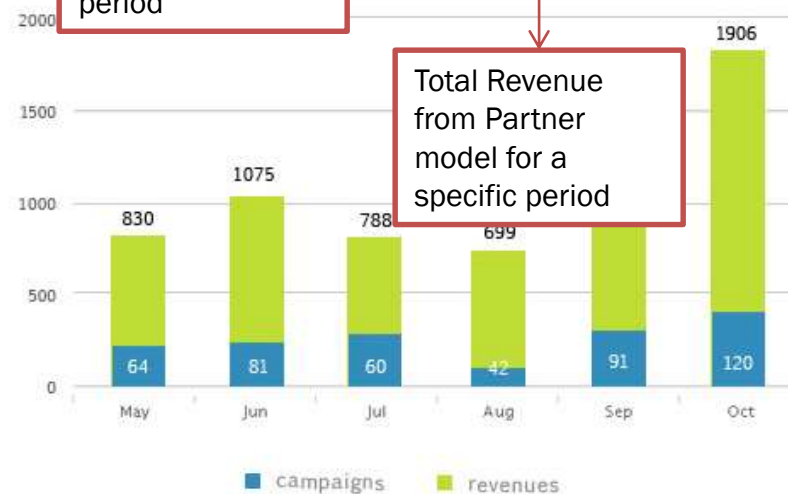
Total Revenue from Offline model for a specific period

offline sales   online sales   partner

REVENUES BY CAMPAIGNS

Total Revenue from Online model for a specific period

Total Revenue from Partner model for a specific period

1906
1075
830   788   699
64   81   60   42   91   120
May   Jun   Jul   Aug   Sep   Oct

campaigns   revenues

TOTAL REVENUES BY FIRST PURCHASE

TOTAL REVENUES BY REPEAT PURCHASE

TOTAL REVENUES	OFFLINE SALES	ONLINE SALES	PARTNER SALES
▼ 25%	▼ 26%	▼ 27%	▲ 22%
$6,720,356	$3,091,364	$1,478,478	$2,150,514

TOTAL REVENUES

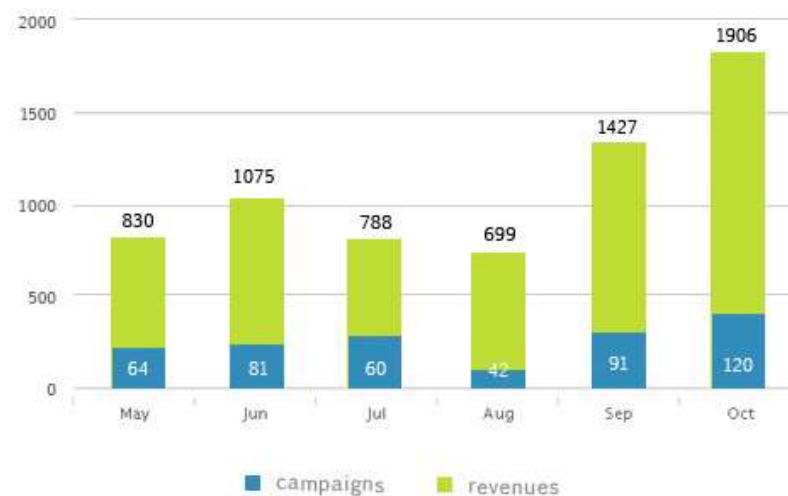offline sales ■ online sales ■ partner

REVENUES BY CAMPAIGNS

■ campaigns ■ revenues

Total Revenues
An overview to understand which model is generating more revenue. In this case, there is online, offline and partner models

Revenues by Campaign
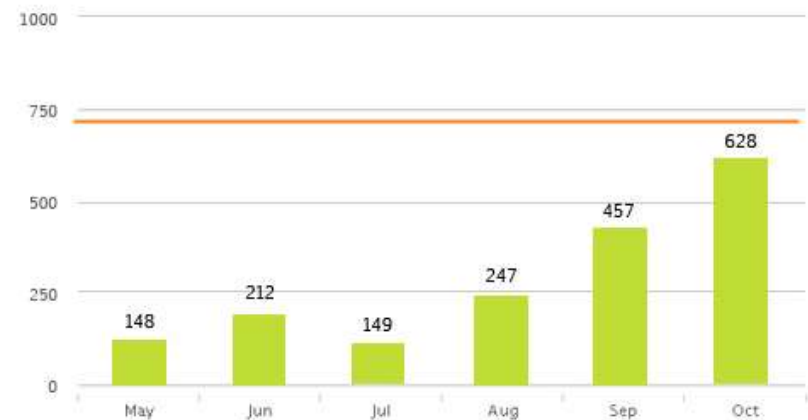An overview to understand which of their campaigns are driving more revenues

offline sales online sales partner

campaigns revenues

TOTAL REVENUES BY FIRST PURCHASE

2000

1500 — 1278

1000 — 862 — 969

681 — 638

500 — 451

0

May Jun Jul Aug Sep Oct

TOTAL REVENUES BY REPEAT PURCHASE

1000

750 — 628

500 — 457

247

250 — 212

148 — 149

0

May Jun Jul Aug Sep Oct
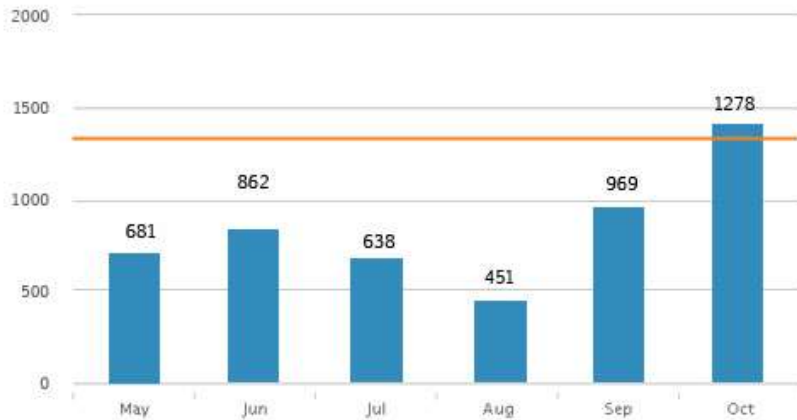
Revenue by First Purchase
First Purchase accounts to customers who made their first purchase. An overview to understand how much of revenue was generated through first purchases
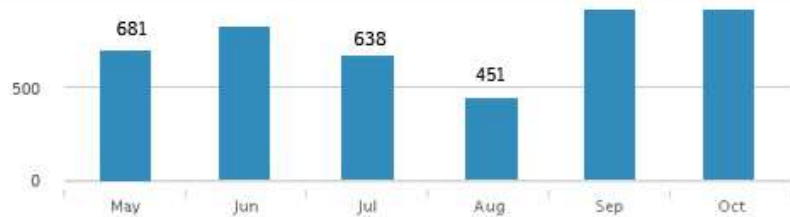
Revenue by Repeat Purchase
First Purchase accounts to customers who have already made their first purchase (Loyal customers). An overview to understand how much of revenue was generated through repeat purchases

200

681   638   451

148   212   149   247   247

BY GEOGRAPHY

REVENUES BY ZONE

revenues

- Zone1
- Zone2
- Zone3
- Zone4
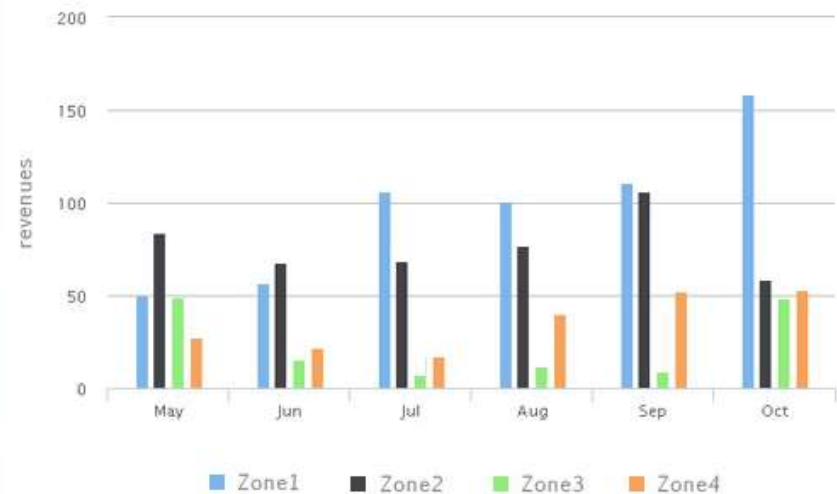
Revenues by Region
An Overview that shows revenues from different zones over a specific period

CUSTOMERS	PRODUCTS	CONVERSIONS	REVENUES	**SPENDS**

TOTAL SPENDS	ADV + LEADGEN	ON CONVERSION	ON RETENTION
▼ 6%	▼ 6%	▼ 7%	▲ 12%
$365,000	$285,000	$28,000	$52,000

SPENDS BY STAGE

Total Spend towards acquisition, conversion and retention for a specific period

Total Spend on Acquisition for a specific period

spends

200
150
100
50
0

May   Jun   Jul   Aug   Sep   Oct

■ adv+leadgen ■ conversion ■ retention

SPENDS BY CAMPAIGN

Total Spend on conversions for a specific period

Total Spend on Retaining customers for a specific period

spends/revenue

200
150
100
50
0

May   Jun   Jul   Aug   Sep   Oct

count
40
30
20
10
0

■ spends ■ revenue ■ campaigns

BY CHANNELS

GOOGLE ADS (PAID)	FACEBOOK (PAID)	LINKEDIN (PAID)	EMAIL
▼ 15%	▲ 11%	▲ 14%	▲ 6%

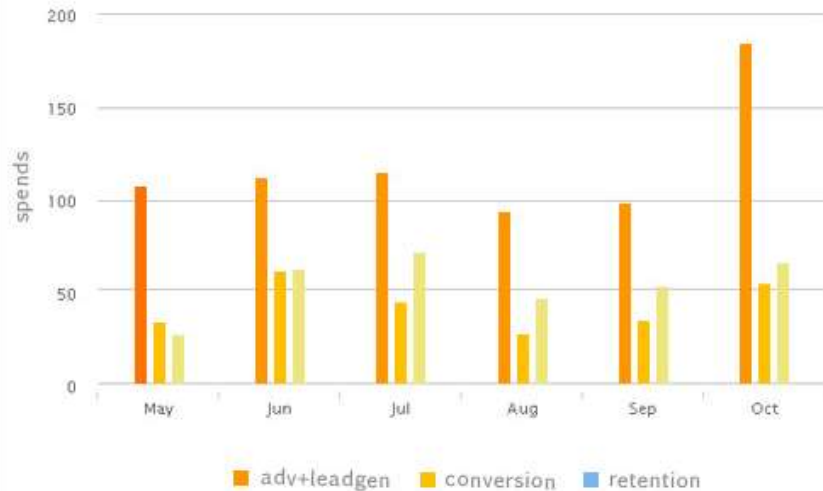| TOTAL SPENDS ▼ 6%	ADV + LEADGEN ▼ 6%	ON CONVERSION ▼ 7%	ON RETENTION ▲ 12%
$365,000	$285,000	$28,000	$52,000

SPENDS BY STAGE

adv+leadgen   conversion   retention
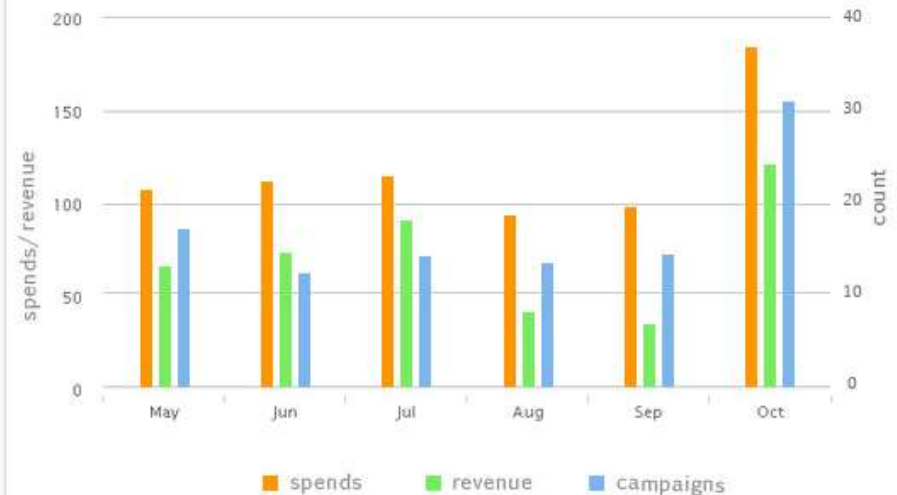

SPENDS BY CAMPAIGN

spends   revenue   campaigns

Overview by Spend on Audience.
A quick overview of how much was spent to acquire, convert and retain over a specific period
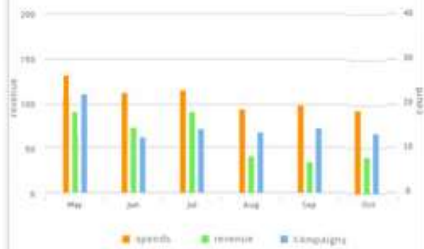
An Overview by Campaigns.
A view by how many campaigns were conducted across all channels for the specific period along with associated spends and revenues

15%

11%

BY CHANNELS

GOOGLE ADS (PAID)
▼ 15%

FACEBOOK (PAID)
▲ 11%

LINKEDIN (PAID)
▲ 14%

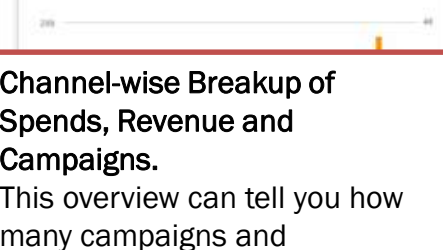### EMAIL
▲ 6%

AFFILIATE
▲ 6%

MOBILE
▲ 12%

OUTBOUND
▲ 2%

EVENTS
▲ 3%

Channel-wise Breakup of Spends, Revenue and Campaigns.
This overview can tell you how many campaigns and associated spend on each channel along with revenue generated from the same

PRINT
▼ 17%

TV
▼ 8%

BTL
▼ 12%

All these dashboards are customizable from the Plumb5 Data Management App

METHODOLOGY

1. To measure Marketing ROI and customer Profitability
2. We need inputs such as spends, revenue and parameters of time and time-costs
3. Spend Inputs are gathered at the first step of each conversion cycle
4. Revenue Inputs are gathered at the last step of each conversion cycle
5. Time Data is available between the first and the last touch-point
6. Time related costs like interests is a **user** field
7. Since Each input is captured by individual user, all inputs necessary for ROI and profitability calculation is available
8. Reverse Roll-up all customers to understand the Marketing ROI of each conversion stage

WHY PLUMB5

• Since Customer Data, Product Data, Interaction Data, Transaction Data and Marketing Spends are present in multiple silos, it is a very hard task to create a single sheet of record due to missing handles

• Plumb5 Unified Stack Solution solves this problem easily as it maintains handle across all data points and creates relationship tags across customer, product, revenues and spends

• This allows Plumb5 to create
    • Single Customer View
    • Seamless Customer Journeys with money spent and earned on every customer
    • Customer Lifetime Value
    • Customer Profitability