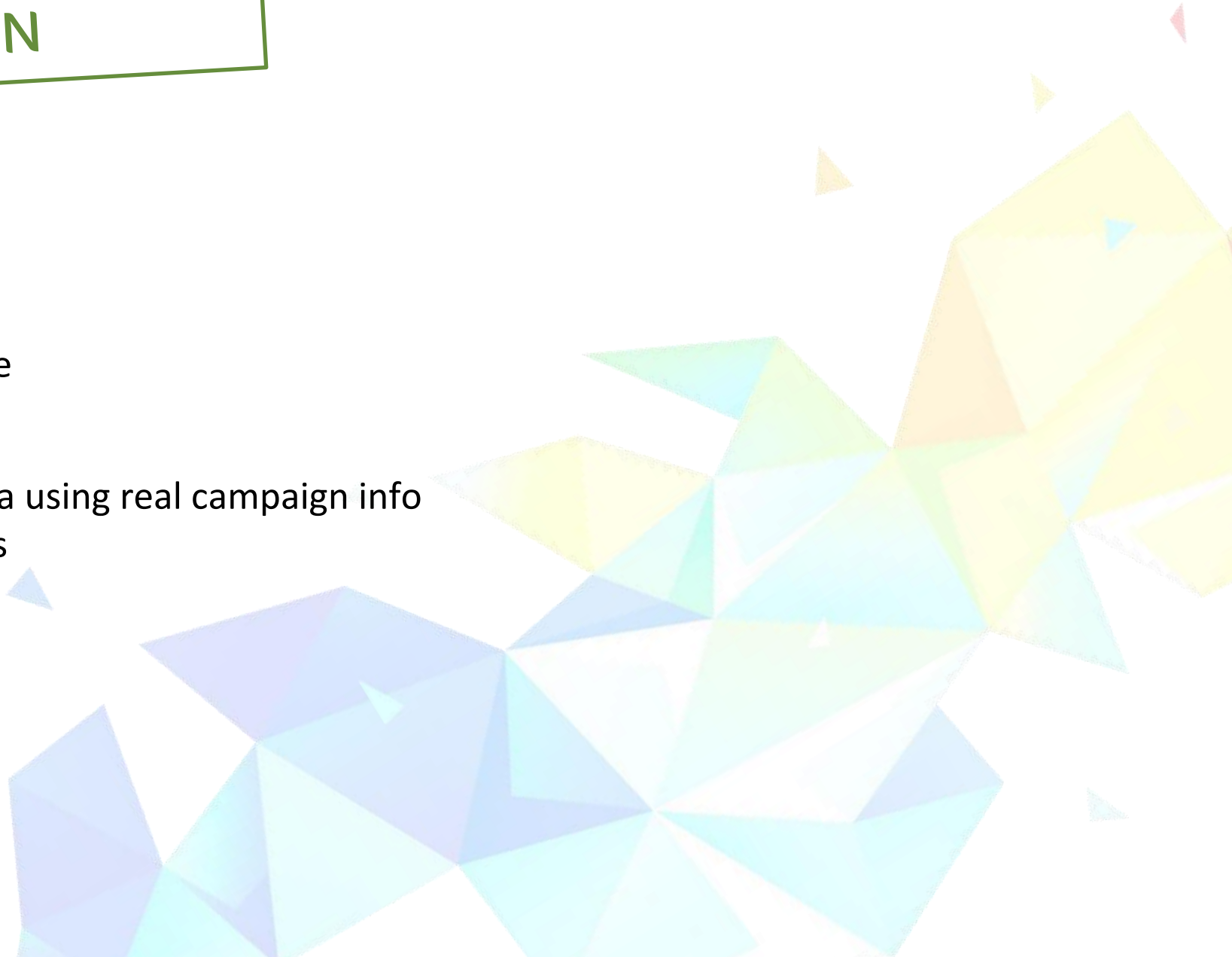


GATORCON 2018

TOPICS FOR DISCUSSION

- Basic functionality of Excel
- Examples of how to use these
- Application to Marketing data using real campaign info
 - Single Campaign Analysis
 - Campaign Comparison
 - MQL Analysis



BASIC FUNCTIONALITY OF EXCEL

- VLOOKUPS / HLOOKUPS
- COUNTIF(S)
- PIVOT TABLES

VLOOKUPS / HLOOKUPS

- **Purpose** – To grab info from one source knowing you have a matching piece of secondary data in another source. This allows you to create new data to:
 - work on combining 2 data sources and simplify things
 - Find info more quickly and in a neater way
- **EXAMPLE**
- Formula: **VLOOKUP(KEY,COLUMN 1:COLUMN N,N,FALSE)**
- KEY: The value that is shared in both data sets
- COLUMN 1:COLUMN N – table range. Our KEY is in COLUMN 1. We can make this table range static by using \$ when defining
- N - We can find the data we want to grab in the Nth column of our table range
- FALSE - we want an exact match for our key value.

Simple example - Vlookup

Data 1

Company Name	Contacts Email
Company 1	Lee@Company1.co.uk
Company 2	Ben@Company2.co.uk
Company 3	Aaron@Company3.co.uk

Simple example - Hlookup

Data 1

	Company 1	Company 2	Company 3
Contact	Lee	Ben	Aaron
Phone no.	01234567891	01234567892	01234567893
County	Surrey	Hampshire	Sussex

Data 2

Company Name	Website	Vlookup from Data 1	Formula used
Company 2	www.company2.co.uk	Ben@Company2.co.uk	VLOOKUP(F14,\$A\$14:\$B\$16,2,FALSE)
Company 3	www.company3.com	Aaron@Company3.co.uk	VLOOKUP(F15,\$A\$14:\$B\$16,2,FALSE)
Company 1	www.1company.de	Lee@Company1.co.uk	VLOOKUP(F16,\$A\$14:\$B\$16,2,FALSE)

Data 2

Address	Company 1	Company 3	Company 2
	1 Gator Way	3 Market Road	2 Email Avenue
	Surrey	Sussex	Hampshire
Hlookup from Data 1			
Formula Used	HLOOKUP(G23,\$B\$23:\$D\$26,4,FALSE)	HLOOKUP(H23,\$B\$23:\$D\$26,4,FALSE)	HLOOKUP(I23,\$B\$23:\$D\$26,4,FALSE)

COUNTIFS

- There are various forms of COUNT in Excel – COUNTIF (1 criteria), COUNTIFS (multiple criteria), COUNTA, COUNTBLANK. Each have strengths depending on data type and goal
- COUNTIF is great for summarising data in numerical form.
- Formula: COUNTIFS(CRITERIA1_COLUMN 1:CRITERIA1_COLUMN N,CRITERIA 1 VALUE,CRITERIA2_COLUMN 1:CRITERIA2_COLUMN N,CRITERIA 2 VALUE).
- CRITERIA1_COLUMN 1:CRITERIA1_COLUMN N - Range that has to meet CRITERIA 1 VALUE to be included in the count
- CRITERIA2_COLUMN 1:CRITERIA2_COLUMN N - Range that has to meet CRITERIA 2 VALUE to be included in the count
- If both criteria are met, cell will be counted – COUNTIFS have multiple criteria and work on an “AND” basis. Both criteria have to be met to be counted.

Company Name	MQL Date	Month	Q/O?	Called?
Company 1	07/03/2018	01/03/2018		No
Company 2	11/04/2018	01/04/2018	Yes	Yes
Company 3	09/05/2018	01/05/2018		Yes
Company 4	06/07/2018	01/07/2018	Yes	No
Company 5	06/08/2018	01/08/2018		Yes
Company 5	25/03/2018	01/03/2018		Yes
Company 6	23/04/2018	01/04/2018	Yes	No
Company 7	14/08/2018	01/08/2018		No
Company 8	01/07/2018	01/07/2018		No
Company 6	13/03/2018	01/03/2018	Yes	Yes
Company 9	17/04/2018	01/04/2018		No
Company 10	26/08/2018	01/08/2018		Yes
Company 11	22/03/2018	01/03/2018		Yes
Company 12	01/05/2018	01/05/2018		Yes
Company 7	02/07/2018	01/07/2018		No
Company 13	07/03/2018	01/03/2018	Yes	Yes
Company 14	23/05/2018	01/05/2018		No
Company 15	15/04/2018	01/04/2018		No

	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18
No. of MQLs per month	5	4	3	0	3	3
No. of Q/O per month	2	2	"yes"	0	1	0
Called - yes	4	1	2	0	0	2
Called - no	1	3	1	0	3	1
Total	5	4	3	0	3	3
Check						
Called but Q/O	2	1	0	0	0	0

=COUNTIFS(\$C\$10:\$C\$27,J13,\$D\$10:\$D\$27,"yes")

PIVOT TABLES

Name	Drink	Date	Count of Drink				Grand Total
			Months	Date			
			May	Jun	Jul	Aug	
Ben	Sambuca	May-18					
Jo	Red	May-18					
Josh	Beer	May-18			1	1	2
Rob	Dry Cider	May-18				3	3
Laura	Orange Juice	May-18			1		1
Sam	Champagne	May-18				1	1
Cat	Gin on the Rocks	May-18		1			1
Simon	Rum	May-18				1	1
Jess	Mojito	May-18				2	2
Grace	Red	Jun-18		3	1		4
Lee	Gin on the Rocks	Jun-18		1		1	2
Aaron	Red	Jun-18				1	1
Ben	Beer	Jun-18			1	2	3
Jo	Mojito	Jun-18					
Josh	Sambuca	Jun-18				1	1
Rob	Sambuca	Jun-18					
Laura	Mojito	Jun-18				1	1
Sam	Red	Jun-18				1	1
Josh	Beer	Jun-18					
Josh	Beer	Jun-18			1	2	3
Josh	Dry Cider	May-18			1		1
Josh	Orange Juice	May-18				1	1
Lee	Gin on the Rocks	May-18			1		1
Aaron	Beer	May-18					
Ben	Orange Juice	May-18				1	1
Jo	Mojito	Jul-18				1	1
Josh	Champagne	Jul-18			1		1
Rob	Champagne	Jul-18					
Laura	Champagne	Jul-18		1	3	1	5
Sam	Gin on the Rocks	Jul-18					
Cat	Mojito	Jul-18				1	1
Simon	Red	Jul-18				1	1
Jess	Rum	Jul-18				1	1
Grace	Rum	Jul-18				3	3
Lee	Gin on the Rocks	Aug-18		1			1
Aaron	Rum	Aug-18		1			1
Ben	Mojito	Aug-18				1	1
Jo	Mojito	Aug-18					
Aaron	Mojito	Aug-18				1	1
Aaron	Mojito	Aug-18					
Aaron	Mojito	Aug-18				1	1
Aaron	Beer	Aug-18				2	2
Cat	Gin on the Rocks	Aug-18		1			1
Lee	Gin on the Rocks	May-18				1	1
Lee	Gin on the Rocks	May-18				2	2
Lee	Rum	May-18				1	1
Lee	Rum	May-18				1	1
Lee	Coke	May-18					
Lee	Coke	May-18				19	19

Name	Drink	Count of Drink	Grand Total
Lee	Gin on the Rocks	3	5
	Rum	2	2
	Coke	1	1
Lee Total		6	8
Aaron	Mojito	3	3
	Beer	1	2
	Rum	1	1
	Red	1	1
Aaron Total		1	5
Josh	Beer	1	3
	Orange Juice	1	1
	Sambuca	1	1
	Champagne	1	1
	Dry Cider	1	1
Josh Total		3	7
Ben	Sambuca	1	1
	Orange Juice	1	1
	Beer	1	1
	Mojito	1	1
Ben Total		2	4
Jo	Mojito	1	3
	Red	1	1
Jo Total		1	4
Sam	Champagne	1	1
	Red	1	1
	Gin on the Rocks	1	1
Sam Total		1	3
Rob	Champagne	1	1
	Sambuca	1	1
	Dry Cider	1	1
Rob Total		1	3
Cat	Gin on the Rocks	1	2
	Mojito	1	1
Cat Total		1	3
Laura	Champagne	1	1
	Orange Juice	1	1
	Mojito	1	1
Laura Total		1	3
Grace	Rum	1	1
	Red	1	1
Grace Total		1	2
Simon	Rum	1	1
	Red	1	1
Simon Total		1	2
Jess	Rum	1	1
	Mojito	1	1
Jess Total		1	2
Grand Total		19	48

- Used to summarise large amounts of data with repeating values used for categorising
- It allows easy manipulation of how the data is summarised to give various ways of analysing the same information
- Our data here is displayed in two ways – by drink and then person on the left table, by person then by drink on the right table
- In this example, Mojito's are clearly the drink of choice and Lee is most thirsty.

EXCEL FOR MARKETERS

TO THE EXCEL MOBILE



EXCEL FOR MARKETERS

EXCEL EXAMPLE WORKINGS

- See the excel workings



SUMMARY

- Simple formulas can lead to easy manipulation of large data volumes.
- Makes it easy to present and interpret with graphs/charts. This can help with management decisions.
- The most time efficient method is to set up a template which you can then drop new data into, refresh and update.
- If in doubt and you need help, contact Jo who can provide consultancy work on your templates.