SPREADSHEETS FOR MARKETING & SALES TRACKING - DATA ANALYSIS TOOLS USING MS EXCEL

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Objectives

By the end of the session, participants should be able to:

a) Identify Ms Excel tools used for data analysis
b) Analyze data using the tools
Ms Excel for Data Analysis

Ms Excel provides powerful tools that for data analysis which include:

a) **Sort**: Help to arrange data in either ascending or descending order. You can sort your data on one column or multiple columns.

b) **Filter**: This is a tool used to display records that meet a certain criteria.

c) **Conditional Formatting**: Conditional formatting enables one to highlight cells with a certain color, depending on the cell's value.
Ms Excel for Data Analysis

d) **Charts:** Enables one to present data in graphical form

e) **Pivot Tables:** A pivot table allows one to extract the significance from a large, detailed data set. It enables one to view data in summarized form which enable one to draws a meaning from the data.

f) **Tables:** Tables allow one to analyze data quickly and easily.
Ms Excel for Data Analysis

g) **What-If Analysis:** What-If Analysis in allows one to try out different values (scenarios) for formulas and predict the possible outcomes based on different scenarios.

h) **Solver:** This tool uses techniques from the operations research to find optimal solutions for all kinds of decision problems.

i) **Analysis ToolPak:** The Analysis ToolPak is an Excel add-in program that provides data analysis tools for financial, statistical and engineering data analysis.
Sort

• Steps:
  i. With an open worksheet, click inside the data that you want to sort
  ii. Click on data tab
  iii. Click on sort from the data ribbon
  iv. The sort dialog box below appear;
v. Select the field to sort by
vi. Select the order to sort by
vii. Click Ok
Filter

- One can do simple filter or advanced filter
- Steps for simple filter:
  i. Click inside the data you want to filter
  ii. Click on the data table
  iii. Click on filter under sort & filter group
  iv. Click on the drop arrow next to the field you want to filter by
  v. Select the field to filter by
  vi. Click Ok

**NB:** Click on filter under sort & filter group again to clear the filter arrows
<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>DATE</th>
<th>COUNTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>$7</td>
<td>17/6/2014</td>
<td>KENYA</td>
</tr>
<tr>
<td>$4,8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$6,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$7,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$6,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$2,0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$4,6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$4,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$2,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$6,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$6,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$4,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$4,5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$5,8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$9,0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$5,068.00</td>
<td>17/6/2014</td>
<td>KENYA</td>
</tr>
<tr>
<td>$7,540.00</td>
<td>23/6/2014</td>
<td>KENYA</td>
</tr>
<tr>
<td>$5,260.00</td>
<td>29/6/2014</td>
<td>KENYA</td>
</tr>
<tr>
<td>$3,000.00</td>
<td>25/5/2014</td>
<td>LIBERIA</td>
</tr>
</tbody>
</table>
Filter

Steps for Advanced filter:

i. Set the criteria range in two cells on adjacent rows using a field name and the condition

ii. Click inside the worksheet

iii. Click on data tab

iv. Click on advanced filter under sort & filter group to display the dialog box below;
Filter

v. Select the list range and the criteria range

vi. You can copy the filtered data in another location within the same sheet or a different sheet by choosing the copy to another location option on the dialog box

vii. Click Ok
PivotTables

Steps:

i. Click on insert tab

ii. Click on pivot tables from the ribbon

iii. The create PivotTable dialog box below appears;

iv. Click Ok
PivotTables

- The PivotTable field list appears;
PivotTables

• In our sample data, to get the total amount exported for each product, drag the following fields to the different areas;

  1. Product Field to the Row Labels area
  2. Amount Field to the Values area
  3. Country Field to the Report Filter area

• A PivotTable as the one below appears and changes as you select different fields
**PivotTables**

A PivotTable is a spreadsheet tool that allows you to summarize, analyze, and present your data. In the image, a PivotTable is shown with the following structure:

- **Row Labels**: Category, Country
- **Values**: Sum of AMOUNT

The PivotTable Field List is open, showing the options for adding fields:

- Order ID
- Product
- Category
- Amount
- Date
- Country

The data in the PivotTable includes:

- **Category**: Apple, Banana, Beans, Broccoli, Cabbage, Carrots, Lemon, Mangoes, Onions, Orange, Sunflower
- **Country**: United States, United Kingdom, Nigeria, Mexico, China, Japan

The total sum of amounts is 37,084.
PivotTables

• You can sort, filter and change the summary calculations using the options provided under the PivotTable tools shown below;
PivotChart

• Steps for inserting PivotChart

i. Click on the PivotTable

ii. Click on PivotTable tools

iii. Under options, click on PivotChart

iv. From the insert chart dialog box, select the type of the chart to use e.g. 3-D Clustered Column

v. Click Ok

NB 1: Under PivotChart tools, you can change chart layout options as you want e.g. chart title, chart axis titles, etc

NB 2: The chart display changes as you change the filter criteria under the PivotTable e.g.
PivotChart with all data in the PivotTable
<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>(All)</th>
<th>COUNTRY</th>
<th>KENYA</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Row Labels</th>
<th>Average of AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>BROCCOLI</td>
<td>4500</td>
</tr>
<tr>
<td>CABBAGE</td>
<td>5260</td>
</tr>
<tr>
<td>APPLE</td>
<td>5868</td>
</tr>
<tr>
<td>CARROTS</td>
<td>9000</td>
</tr>
<tr>
<td>Grand Total</td>
<td>6012.5</td>
</tr>
</tbody>
</table>

![PivotChart with filtered data in the PivotTable](image-url)
WHAT-IF ANALYSIS

• What-If Analysis in allows one to try out different values (scenarios) for formulas and predict the possible outcomes based on different scenarios

• Steps
  i. Click on your worksheet
  ii. Click on data tab
  iii. Click on What-if Analysis on the data ribbon
  iv. Choose to use scenario manager or goal seek or table
WHAT-IF ANALYSIS

Using the Scenario Manager

- Click on Scenario Manager from What-if-Analysis drop down list
- The dialog box below appears.
WHAT-IF ANALYSIS

v. Click on add to add a Scenario
vi. Type scenario name
vii. Choose the changing cells e.g. Quantity
viii. Enter new values for the changing cells
ix. Click ok
x. Then click show to view the changes in the calculated values
WHAT-IF ANALYSIS

- Using the Goal Seek
  i. Select the cell containing the formula that will return the result you’re seeking; in this example, cell G5
  ii. On the Data tab, choose What-If Analysis→Goal Seek in the Data Tools group

NB: Dialog box below appears;
WHAT-IF ANALYSIS

iii. Select the To Value text box and enter the goal
iv. Select the By Changing Cell text box and select the cell that you want to change
v. Click OK
vi. If you want to keep the values entered in the worksheet as a result of goal seeking, click OK as in the diagram below;
**WHAT-IF ANALYSIS**

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>QUANTITY (KGS)</th>
<th>UNIT BUYING</th>
<th>TOTAL BUYING PRICE</th>
<th>UNIT SELLING PRICE</th>
<th>SELLING PRICE</th>
<th>PROFIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEANS</td>
<td>500.00</td>
<td>105.00</td>
<td>52,500.00</td>
<td>120.00</td>
<td>60,000.00</td>
<td>7,500.00</td>
</tr>
<tr>
<td>MAIZE</td>
<td>350.00</td>
<td>126.00</td>
<td>44,100.00</td>
<td>144.00</td>
<td>50,400.00</td>
<td>6,300.00</td>
</tr>
<tr>
<td>SOGHURM</td>
<td>250.00</td>
<td>89.00</td>
<td>22,250.00</td>
<td>101.71</td>
<td>25,428.57</td>
<td>3,178.57</td>
</tr>
<tr>
<td>MILLET</td>
<td>420.00</td>
<td>95.00</td>
<td>39,900.00</td>
<td>108.57</td>
<td>45,600.00</td>
<td>5,700.00</td>
</tr>
<tr>
<td>PEAS</td>
<td>600.00</td>
<td>98.00</td>
<td>58,800.00</td>
<td>112.00</td>
<td>67,200.00</td>
<td>8,400.00</td>
</tr>
<tr>
<td>TOTAL SALES</td>
<td></td>
<td></td>
<td>217,550.00</td>
<td></td>
<td>248,628.57</td>
<td>31,078.57</td>
</tr>
</tbody>
</table>

**PROFIT MARGING** 14%