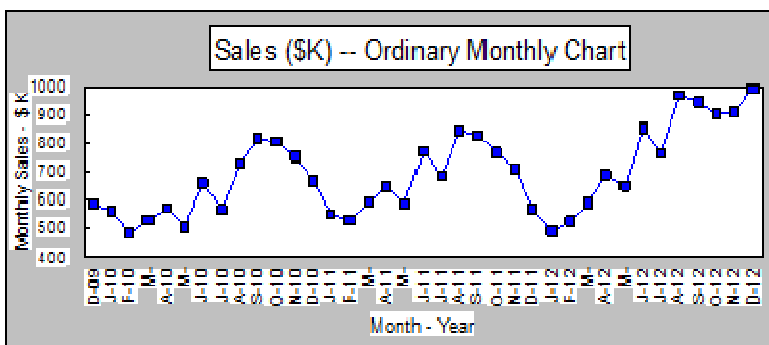


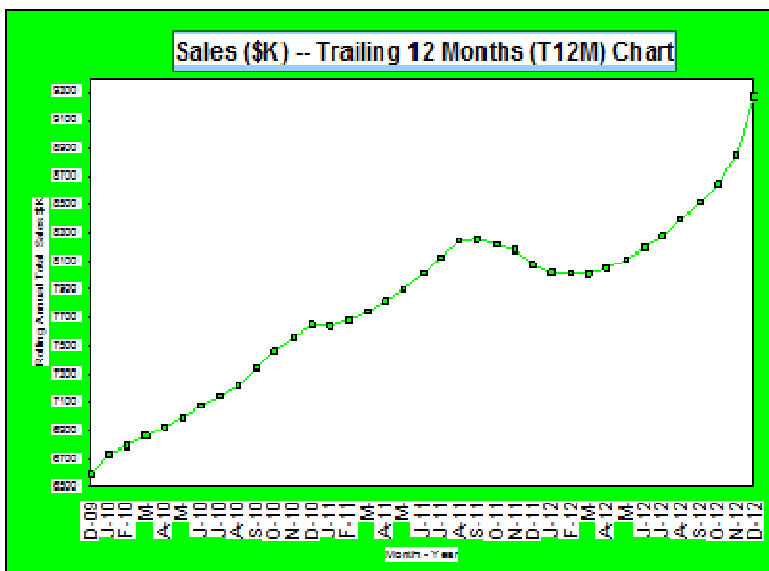
# Sales Strategy Tool (Qroc Chart)

Example: See "BUY IT!" Below.

UPDATED 2012

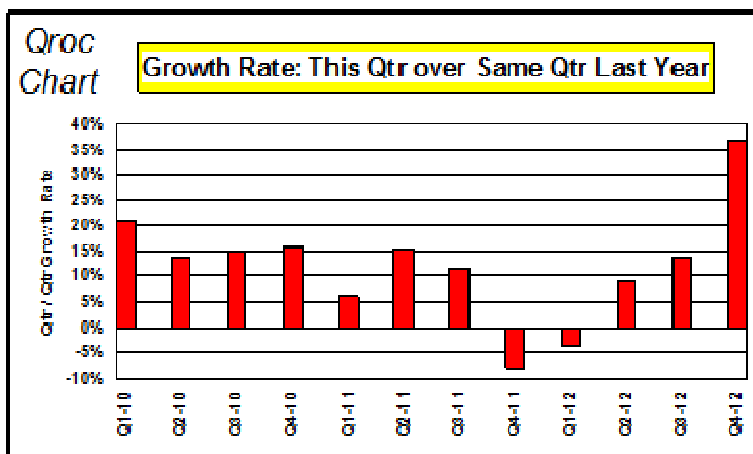


Shows seasonality... but doesn't show much else, especially not sales performance! For example, you can't tell if you're doing better or worse during the seasonal downturns versus same time last year.



Uses the same data, but now shows what's REALLY happening with your sales performance! Up is good, down bad. Eliminates seasonality and most other periodic influences.

But what's your Sales Strategy? Consistent growth or erratic ups and downs? Keep reading to know the answer...



Uses the same data again... but really tells the story! Shows consistency, or lack thereof, for your Growth Rate and your Sales Strategy! Removes seasonality and most other periodic influences.

Observe that 37% growth is probably too much and -8% is perhaps too low a rate. Consistency is the goal: it dramatically improves profitability, not to mention cash flow! Now "BUY IT!" and enter your own data to start managing a really great sales strategy!

Page Down to see the data input area and "how-to."

**BUY IT!**

To buy this tool in fully usable Excel Format, go to: [www.ceotools.com](http://www.ceotools.com) and use Visa or MC. It's \$44.00 ready in Excel. Sent immediately to your email - then click blue download link.

Example of Quarterly Rate-of-Change (Qroc) Charts

One of the Most Powerful Tools ANY Manager Can Use!

Use this tool now! Order it & enter your data in Col A.



HOW TO GET STARTED:

Example of charting this quarter's SALES data on a Qroc (Quarterly Rate-of-Change) basis. You'll get a barchart with no seasonality and every bar is comparable to every other bar. Look at this chart to see consistency or lack of it in your sales growth rate! Use a regular spreadsheet software package like Lotus or Excel. Enter month/year in Column B and monthly data in Column A as shown below. Then enter a sum function in the spreadsheet in Column C, Row 12: @sum(A1...A12) and copy it on down that column. This is a simple 12-month sum that moves forward one month (and down a row) at a time. Then chart it on the same page with the spreadsheet's Chart Function. Better yet, enter your data in Column "A" below (blue), re-scale the charts, and voila - instant Qroc! You can use this model for your own Qroc by simply replacing the data below with your own...then see your charts (above).

	Column A Monthly Sales (\$K)	Column B Month-Year	Column C T12M Sales (\$K) (for T12M chart)	T3M	Quarterly Rate of Change % (Qtr / Qtr)	Annual Total Sales (\$M)	Annual Rate of Change % (Yr / Yr)
Row 1	415	J-09				59.95	---
Row 2	425	F-09					
Row 3	460	M-09		1300			
Row 4	510	A-09					
Row 5	435	M-09					
Row 6	585	J-09		1530			
Row 7	495	J-09					
Row 8	645	A-09					
Row 9	700	S-09		1840			
Row 10	685	O-09					
Row 11	650	N-09					
Row 12	585	D-09	6590	1920		71.9	20%
Row 13	561	J-10	6736				
Row 14	484	F-10	6795		Q1-10	21%	
Row 15	528	M-10	6863	1573			
Row 16	572	A-10	6925				
Row 17	506	M-10	6996		Q2-10	14%	
Row 18	660	J-10	7071	1738			
Row 19	567	J-10	7143				
Row 20	729	A-10	7227		Q3-10	15%	
Row 21	817	S-10	7344	2113			
Row 22	805	O-10	7464				
Row 23	753	N-10	7567				
Row 24	668	D-10	7650	2226	Q4-10	16%	86.8
Row 25	550	J-11	7639				21%
Row 26	528	F-11	7683				
Row 27	592	M-11	7747	1670	Q1-11	6%	
Row 28	647	A-11	7822				
Row 29	588	M-11	7904				
Row 30	772	J-11	8016	2007	Q2-11	15%	
Row 31	684	J-11	8133				
Row 32	844	A-11	8248				
Row 33	828	S-11	8259	2356	Q3-11	12%	
Row 34	765	O-11	8219				
Row 35	712	N-11	8178				
Row 36	570	D-11	8080	2047	Q4-11	-8%	98.8
Row 37	490	J-12	8020				14%
Row 38	525	F-12	8017				
Row 39	590	M-12	8015	1605	Q1-12	-4%	
Row 40	689	A-12	8057				
Row 41	648	M-12	8117				
Row 42	853	J-12	8198	2190	Q2-12	9%	
Row 43	765	J-12	8279				
Row 44	968	A-12	8403				
Row 45	945	S-12	8520	2678	Q3-12	14%	
Row 46	900	O-12	8655				
Row 47	910	N-12	8853				
Row 48	990	D-12	9273	2800	Q4-12	37%	120
							21%

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## **Kraig's Chart Tips**

- 1. Line graphs, never bar charts, seldom pie.**
- 2. One graph per chart...stack charts vertically if you want comparatives!**
- 3. Two years of history plus the year we're now in and tracking.**
- 4. Re-scale to fill up vertical space (see Page 7 aka Fix Up Your Chart!).**
- 5. T12M for one variable vs. 12MMA for two (% , ratio, index).**
- 6. Right chart time frequency: T12M, T4Q, T52W, and/or T365D.**
- 7. Power-Tools: 4-Charts, 5-Charts, 8-Charts @ [www.ceotools.com](http://www.ceotools.com).**
- 8. Only T12M-type charts; those ordinary and YTD charts lie!**
- 9. You can track ANYTHING with T12M and related charts.**
- 10. Use to forecast budget or projections – and track actuals against.**
- 11. No trailing 3-month, 6-month, or 18-month charts: they'll bite you!**
- 12. Charts should have white background and big data point markers along the lines of your graphs.**
- 13. Eventually, we'll talk about 3-over-3 and 12-over-12 charts (also known as rate-of-change charts), but please understand T12Ms thoroughly first, else confusion will probably result! Yes, I do love those RoC charts, too!**
- 14. Try Dashboards: visit [www.ceotools.com](http://www.ceotools.com), click on New Tools Catalog, then scroll down to various dashboards on many business topics!**

## **FIX UP YOUR CHARTS!**

From CEO Tools at [www.ceotools.com](http://www.ceotools.com)

Many users have complained that Microsoft Excel's charting is not user-friendly and doesn't "work." This forced us to develop some information on using, applying, and overcoming Excel's charting shortcomings. Excel can indeed work, and we're all stuck with it, so here are a few tips, tools, and ideas based on extensive use of Excel's XP versions...other versions and operating environments before and after XP (e.g., 95, 2000, Vista, Seven) contain many of the same challenges, inconveniently re-packaged by Microsoft into even more challenging apps. Please use this guide to overcome these, but also please adapt our approach to different Excel versions. These tips also work for most charts in other software.

**How to Re-Scale Your Charts:** It is necessary to re-scale your chart when you first enter your data in any Trailing 12-Month (T12M) Chart or 12-Month Moving Average (12MMA), dashboard, or for that matter, any ordinary chart (it's just basic Excel 101A), and then every once in a while thereafter. The idea is to get your graph on each chart to "fill up" the vertical space of the chart border, so that your eye can most easily see ups and downs over the months. To re-scale, right-click in the vertical (left-hand, Y-axis) of each chart to get a "Format Axis" dropdown; then just select "Options" or "Format Axis" and you should see where you can select "Scale." Do select Scale and then change the Min, Max, Major & Minor Units, as well as the X-Axis Cross Point to be compatible with the full range of your calculated or entered numbers being charted. Again, the idea is to run your graph from your smallest number to the largest from that column (take a look at how we did it on T12M Charts at [www.ceotools.com](http://www.ceotools.com)). Save after re-scaling!

Another thought: you may need to re-scale or change the horizontal axis to show the right months. At [www.ceotools.com](http://www.ceotools.com) we re-set all charts each year so that you can download them with the upcoming year ready-to-go. If you want to do this yourself, just follow the same logic presented for the vertical axis to change your time (horizontal) axis.

**How to Structure Your Charts:** We like our charts to have two years of history plus the year we're currently tracking (currently in). What this does is allow you to see an overall trend, not just this year versus last. But at the same time, you don't want more than two years of history, else your chart might be scaled so severely that you don't see the fluctuations in current months that you need to see. So, let's say you want to set up a chart to track your sales each month during 2010 – you'll want to show each month of actual sales for 2008 and 2009 with the 12 months of 2010 on the chart with no numbers in them as you start the year. Take a quick look at the free PDF of the T12M Chart at [www.ceotools.com](http://www.ceotools.com) to see an example of this.

**How to Update Your T12M or 12MMA Charts Each Month:** As you enter your regular monthly number each month into the data column for an Excel chart, it will be necessary to *copy-paste* the logic for calculating that month's *T12M* or *12MMA number* down one row each month as you enter the actual new monthly number.



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