

# Trailing 4-Quarters Moving Average Chart

Example -- See "Buy It!" Below.

Use the second page (down) to customize your own T4Q.

UPDATED -- 2010



## HOW TO GET STARTED:

Example of charting Customer Satisfaction Index (CSI) data on a T4Q (Trailing Four Quarter) basis. You'll get a chart with NO SEASONALITY and every point is comparable to every other point. Look at this T4Q chart quarterly to see things you never saw before about your business!

It's a ROLLING 4-QUARTER AVERAGE tracked quarterly. T4Q charts will clearly tell you whether you're doing good or bad! Ordinary quarterly charts often mislead and show little other than seasonality (see charts below, with fourth quarter seasonal downturns in the Ordinary Chart).

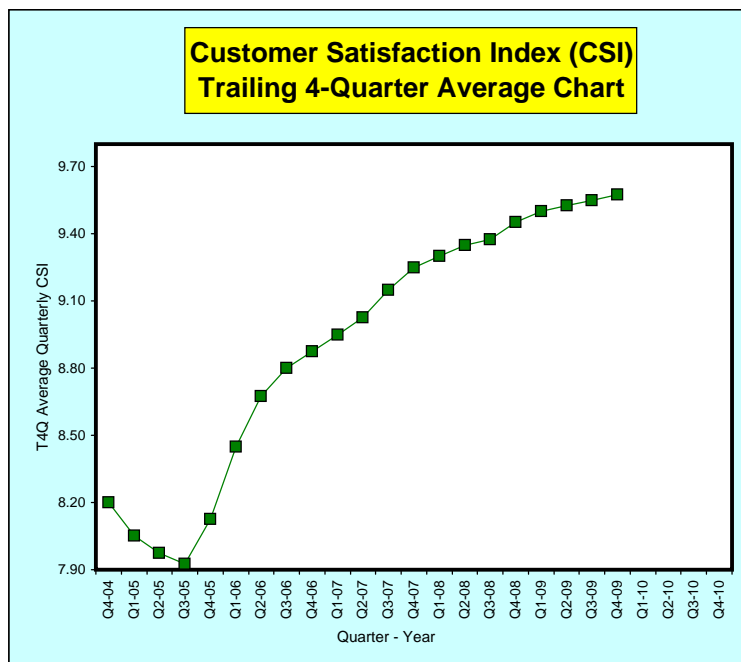
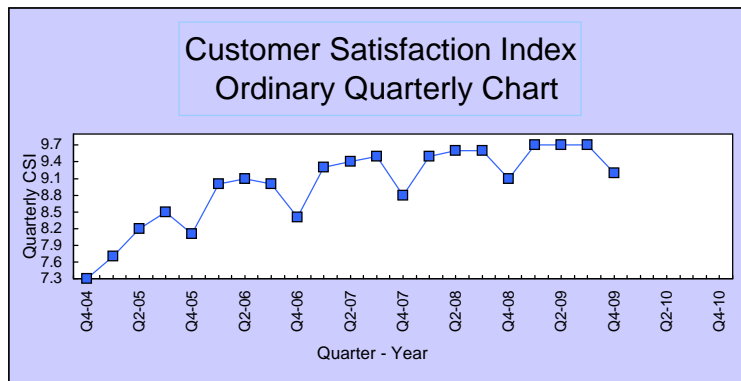
You want to know both about seasonality and about the true trend, Only T4Q's show true trend. T4Q charts also show historical perspective.

Use a regular spreadsheet software package like Lotus or Excel. Enter the quarter/year in Column E and quarterly data in Column C as shown below.

Then enter a sum function in the spreadsheet in Column F, Row 24: =sum(F24...F27) and now copy it on down that column.

This is a simple 4-quarter sum that moves forward one quarter (and down one row) at a time. Then chart on the same page using the spreadsheet Chart Function. Better yet, enter your data in the columns in the clean spreadsheet below this one, label it as your own, save and print!

	Quarterly Index	Qtr-Year	T4Q Average Index for T4Q Chart
Row 1	8.3	Q1-04	
Row 2	8.5	Q2-04	
Row 3	8.7	Q3-04	
Row 4	7.3	Q4-04	8.20
Row 5	7.7	Q1-05	8.05
Row 6	8.2	Q2-05	7.98
Row 7	8.5	Q3-05	7.93
Row 8	8.1	Q4-05	8.13
Row 9	9.0	Q1-06	8.45
Row 10	9.1	Q2-06	8.68
Row 11	9.0	Q3-06	8.80
Row 12	8.4	Q4-06	8.88
Row 13	9.3	Q1-07	8.95
Row 14	9.4	Q2-07	9.03
Row 15	9.5	Q3-07	9.15
Row 16	8.8	Q4-07	9.25
Row 17	9.5	Q1-08	9.30
Row 18	9.6	Q2-08	9.35
Row 19	9.6	Q3-08	9.38
Row 20	9.1	Q4-08	9.45
Row 21	9.7	Q1-09	9.50
Row 22	9.7	Q2-09	9.53
Row 23	9.7	Q3-09	9.55
Row 24	9.2	Q4-09	9.58
Row 25		Q1-10	
Row 26		Q2-10	
Row 27		Q3-10	
Row 28		Q4-10	



Now look at your T4Q chart: if it's going up this quarter, that's GOOD! If it's going down, that's VERY BAD! And this then requires IMMEDIATE ACTION by you to make it improve! Use this T4Q technique to track Customer Satisfaction, Employee Satisfaction, and just about anything else of importance to you. You'll be amazed at your improved success! Line up Ordinary charts above the T4Q to see your seasonality, then work to "fill up" the troughs in your year! (See the true meaning of the two seasonal downs from the Ordinary chart on the T4Q!)

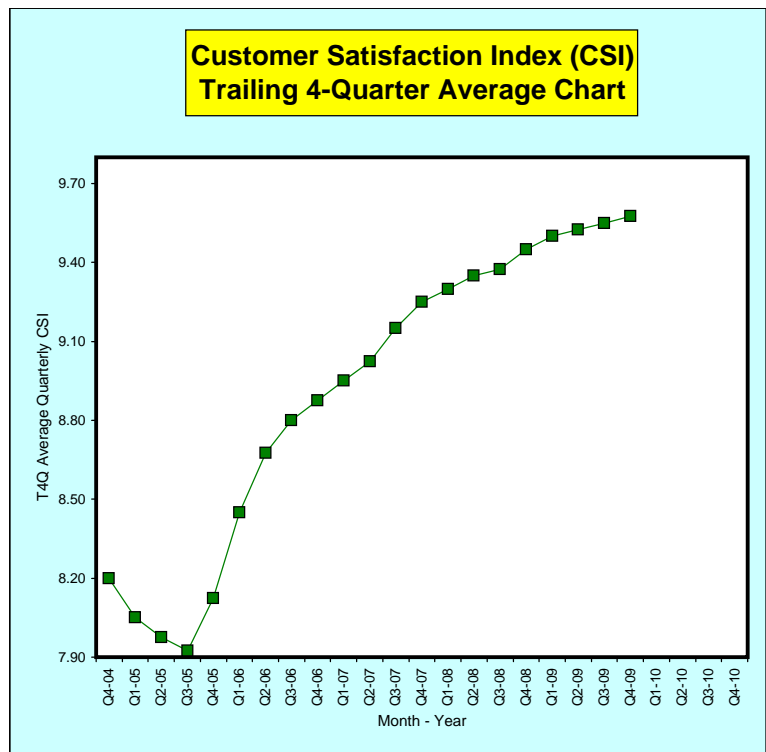
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# Your Company's Trailing 4-Quarters Moving Average (T4Q) Chart



## Customer Satisfaction Index (CSI)

	Quarterly Index	Qtr-Year	T4Q Average Index for T4Q Chart
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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.