



Date Fields ready for next 12+ months: see second page!

Use the second page (down) to customize your own T12M.

NOTE! Updated through 2010 to save you time NOW!

HOW TO GET STARTED - FIRST, PRINT OUT ALL THE PAGES VERTICALLY (5 OF THEM).

UPDATED -- 2010

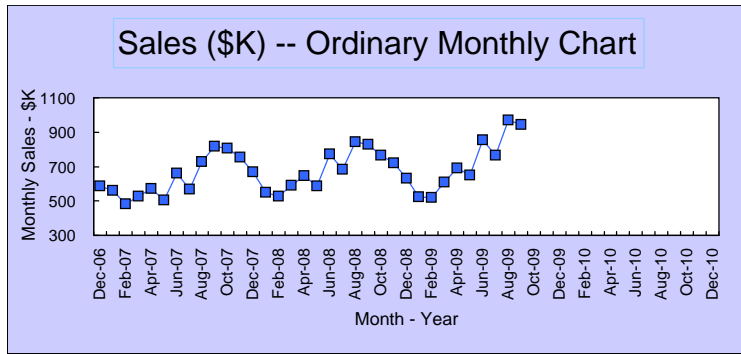
This page is an example of charting 3 years of monthly SALES data on a T12M (Trailing Twelve Months) Chart. You get a chart without SEASONALITY and every point is comparable to every other point. Look at this chart monthly to see things you never saw before about your business!

It's a ROLLING ANNUAL TOTAL tracked monthly. T12M charts will clearly tell you whether you're doing good or bad! Ordinary monthly charts often mislead and show little other than seasonality (see charts below). T12M charts also show historical perspective, a true trendline.

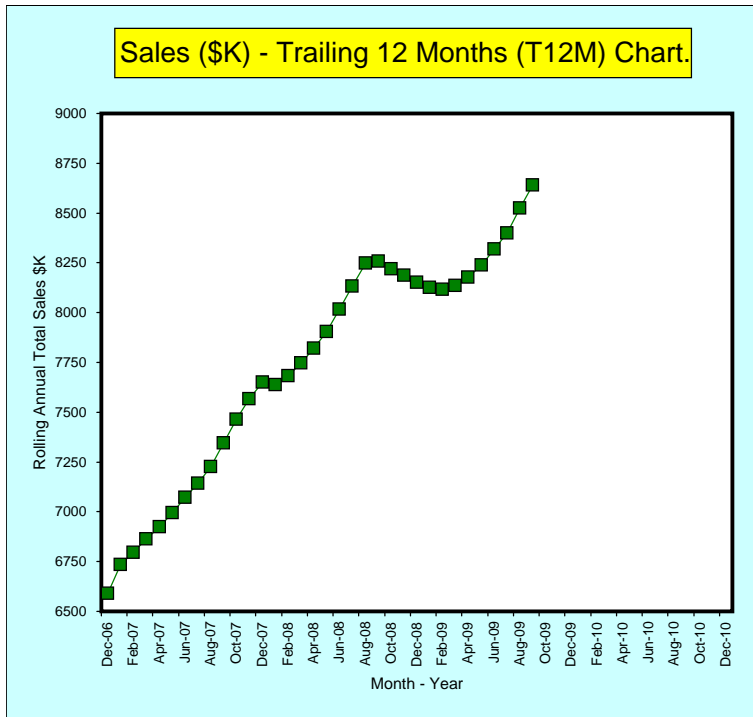
Use the 2nd page down for your spreadsheet and Charts in Excel. Enter the month/year in Column B and monthly data in Column A as shown below. Then enter a sum function in the spreadsheet in Column C, Row 12: @sum(A1...A12) and now copy it on down that column.

This is a simple 12-month sum that moves forward one month (and down one row) at a time. Chart it on the same page with the spreadsheet's Chart Function. Easiest way: just enter your data in Column "A" (blue) on "Your Company's T12M Chart" page below, re-scale, and you'll have it!

	Col A: Monthly Sales (\$K)	Col B: Mo-Year	Col C: T12M Sales (\$K) (T12M chart)
Row 1	415	Jan-06	
Row 2	425	Feb-06	
Row 3	460	Mar-06	
Row 4	510	Apr-06	
Row 5	435	May-06	
Row 6	585	Jun-06	
Row 7	495	Jul-06	
Row 8	645	Aug-06	
Row 9	700	Sep-06	
Row 10	685	Oct-06	
Row 11	650	Nov-06	
Row 12	585	Dec-06	6590
Row 13	561	Jan-07	6736
Row 14	484	Feb-07	6795
Row 15	528	Mar-07	6863
Row 16	572	Apr-07	6925
Row 17	506	May-07	6996
Row 18	660	Jun-07	7071
Row 19	567	Jul-07	7143
Row 20	729	Aug-07	7227
Row 21	817	Sep-07	7344
Row 22	805	Oct-07	7464
Row 23	753	Nov-07	7567
Row 24	668	Dec-07	7650
Row 25	550	Jan-08	7639
Row 26	528	Feb-08	7683
Row 27	592	Mar-08	7747
Row 28	647	Apr-08	7822
Row 29	588	May-08	7904
Row 30	772	Jun-08	8016
Row 31	684	Jul-08	8133
Row 32	844	Aug-08	8248
Row 33	828	Sep-08	8259
Row 34	765	Oct-08	8219
Row 35	722	Nov-08	8188
Row 36	630	Dec-08	8150
Row 37	525	Jan-09	8125
Row 38	520	Feb-09	8117
Row 39	610	Mar-09	8135
Row 40	689	Apr-09	8177
Row 41	648	May-09	8237
Row 42	853	Jun-09	8318
Row 43	765	Jul-09	8399
Row 44	968	Aug-09	8523
Row 45	945	Sep-09	8640



Helpful Explanations:
 The figure in Col C, Row 12 is the sum of the numbers in Col A, Row 1 through 12.
 Similarly, the figure in C13 is the sum from A2 through A13, and so on.
 Re-scale your charts by dbl-clicking in the vertical axis of the chart, select scale and enter your min and max from T12M column for your numbers, OK and save.



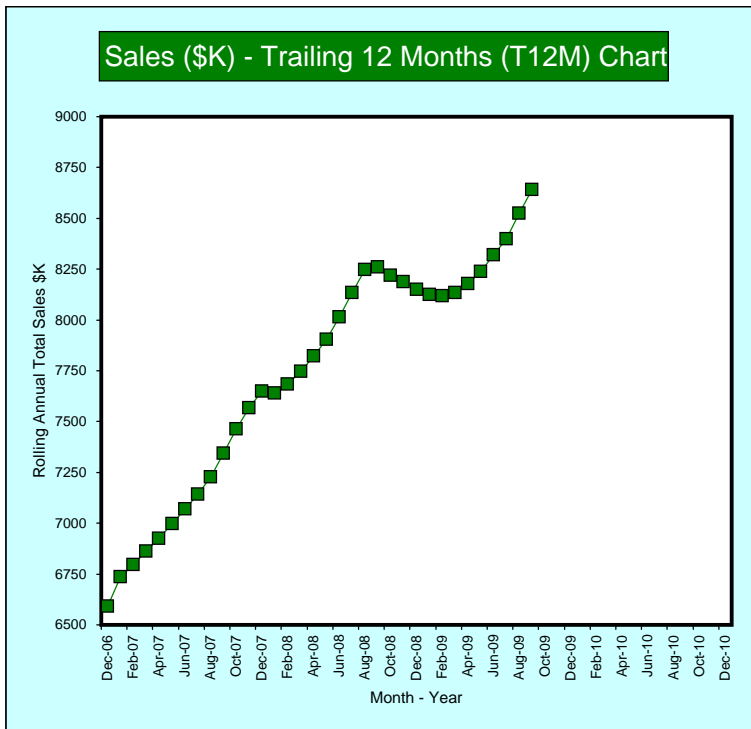
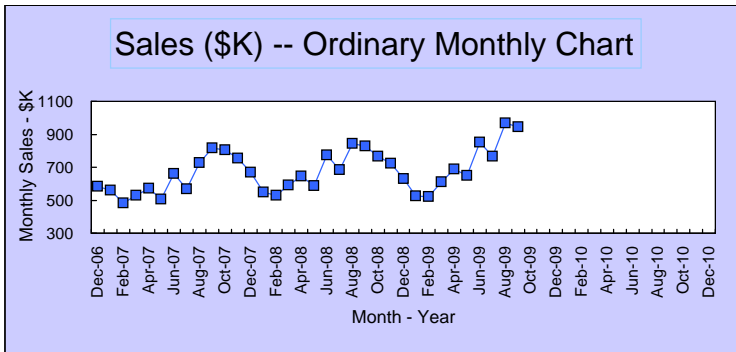
Now look at your T12M chart: if it's going up this month, that's GOOD! If it's going down, that's VERY BAD! And this then requires IMMEDIATE ACTION by you to get more sales! Use this T12M technique to track revenues, gross profit\$, gross margins (%), and just about anything else of importance to you. You'll be amazed at your improved success! Line up Ordinary charts above the T12M 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 T12M!)

BUY IT! To buy this tool in easy to use Excel Format, go to: www.ceotools.com and use Visa or M/C. Only \$19.95 in ready-to-use Excel format. Emailed immediately to your email address!

Your Company's Trailing 12 Months (T12M) Chart



	Col A: Monthly Sales (\$K)	Col B: Mo-Year (T12M chart)	Col C: T12M Sales (\$K)
Row 1	415	Jan-06	
Row 2	425	Feb-06	
Row 3	460	Mar-06	
Row 4	510	Apr-06	
Row 5	435	May-06	
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Row 47		Nov-09	
Row 48		Dec-09	
Row 49		Jan-10	
Row 50		Feb-10	
Row 51		Mar-10	
Row 52		Apr-10	
Row 53		May-10	
Row 54		Jun-10	
Row 55		Jul-10	
Row 56		Aug-10	
Row 57		Sep-10	
Row 58		Oct-10	
Row 59		Nov-10	
Row 60		Dec-10	



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FIX UP YOUR CHARTS!

From CEO Tools at 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). 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 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 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.



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.**
- 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, click on New Tools Catalog, then scroll down to various dashboards on many business topics!**



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