

SAMPLE DELIVERABLE • KPI DASHBOARD & MIS

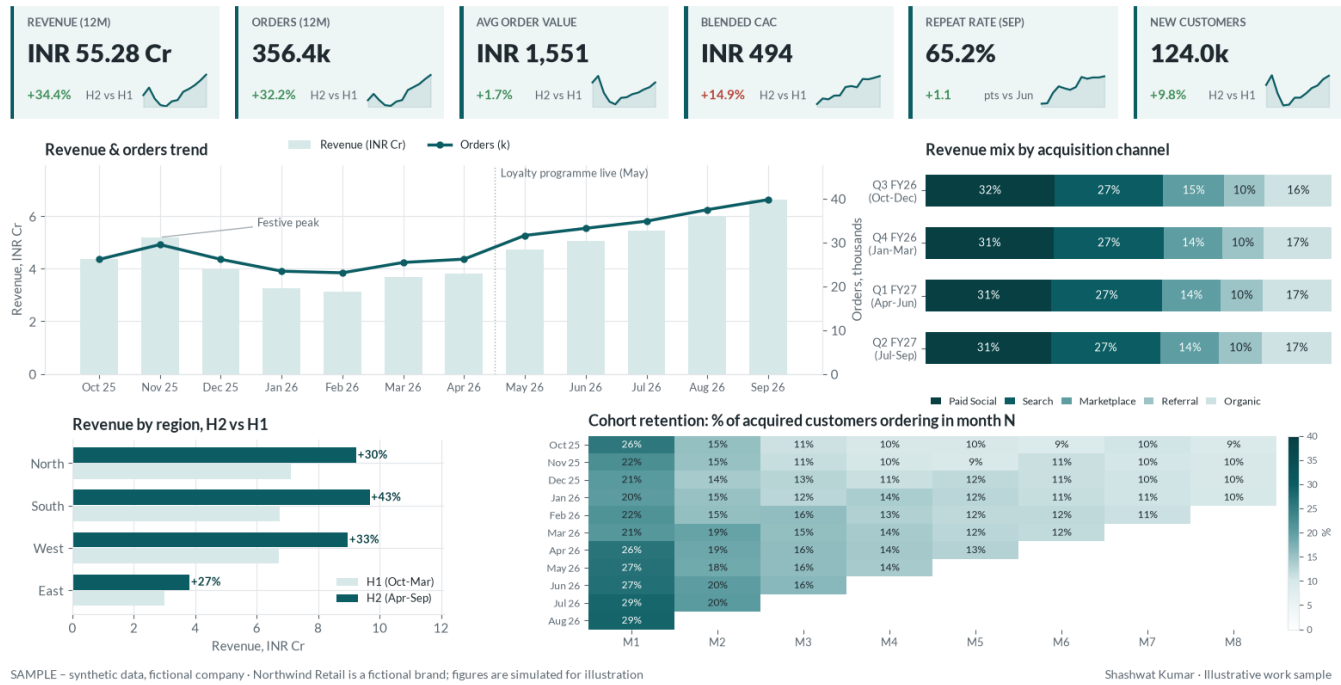
Northwind Retail: 12-month performance review

Reporting period Oct 2025 – Sep 2026 • D2C apparel & home (fictional brand) • All numbers simulated

Northwind Retail

D2C Performance Dashboard • Oct 2025 – Sep 2026 • Monthly MIS

SAMPLE - synthetic data - fictional company



Executive summary

Northwind closed the year at **INR 55.28 Cr** revenue from **356k orders** (AOV INR 1,551). H2 revenue was +34.4% vs H1 despite H1 containing the festive peak, so the underlying run-rate is healthy. Growth, however, is being bought at a rising price.

- **Acquisition cost is the main risk.** Paid-social CAC rose from INR 500 to INR 821 (+64%) while it still drives 31% of revenue.
- **Retention is the main lever.** Average repeat rate moved from 57.1% (H1) to 64.0% (H2) after the May loyalty launch.
- **Referral is the most efficient scalable channel** at 10.7x 6-month revenue-to-CAC vs 3.9x for paid social, yet it gets ~5% of spend.
- **South is the growth region** (+43% H2 vs H1); East is flat and has the lowest AOV.

Recommendation in one line: shift 20% of paid-social budget into referral and retention, and set CAC guardrails by channel (page 4).

KPI DICTIONARY

One definition per number, agreed once

Each KPI below has a single owner, formula, grain and source. This dictionary is the contract between finance, marketing and the data team; the dashboard and the monthly MIS pack compute every tile from these definitions only.

KPI	Definition & formula	Grain	Source	Owner	FY27 target
Revenue	Sum of net order value after discounts, excl. GST, returns and cancellations	Month · channel · region	OMS orders	Finance	INR 68 Cr
Orders	Count of distinct non-cancelled order IDs	Month · channel · region	OMS orders	Ops	+20% YoY
AOV	Revenue ÷ Orders	Month · channel	Derived	Category	INR 1,500
New customers	Customers whose first-ever order falls in the month	Month · acq. channel	CRM	Growth	+15% YoY
CAC (blended)	Total acquisition spend ÷ New customers (paid + content + referral rewards)	Month · channel	Ad platforms, finance GL	Growth	≤ INR 450
CAC (by channel)	Channel spend ÷ New customers first-touch attributed to that channel	Month · channel	Ad platforms + CRM	Growth	Channel caps
Repeat rate	Active customers with ≥1 prior order ÷ All active customers in month	Month	OMS + CRM	CRM lead	≥ 68%
Cohort retention (Mn)	Customers of acquisition month c ordering in month c+n ÷ cohort size	Cohort × month	OMS + CRM	CRM lead	M3 ≥ 15%
Revenue / CAC	6-month revenue per acquired customer ÷ channel CAC (cohort basis)	Channel	Derived	Growth + Finance	≥ 3.0x
Active customers	Distinct customers with ≥1 order in month	Month · region	OMS	CRM lead	Tracked

Data & refresh rules

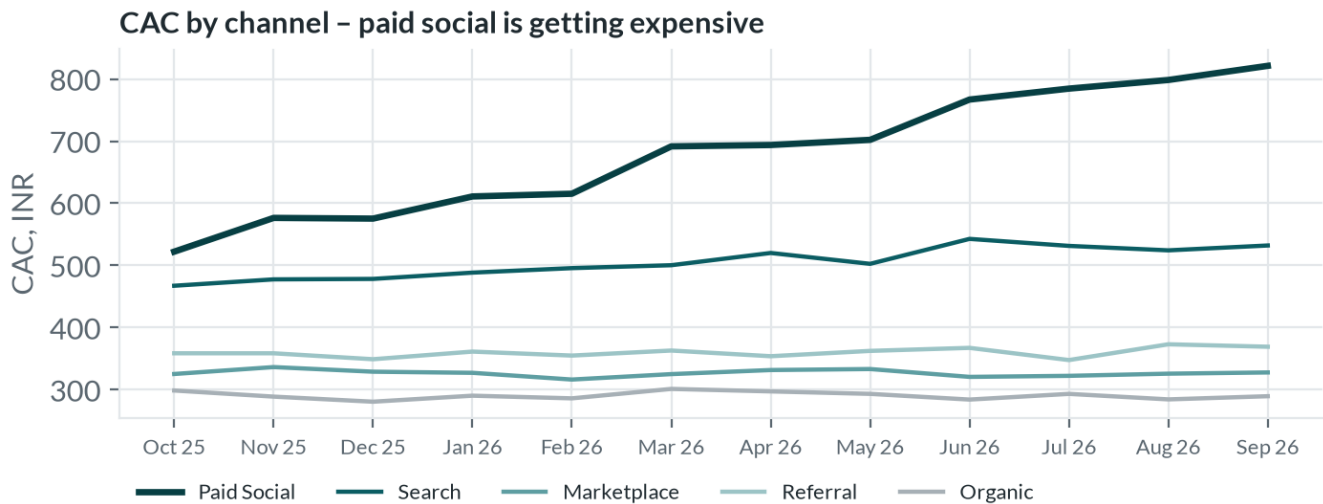
- Refresh: daily at 06:00 IST for operational tiles; MIS pack frozen on working day 3 of the following month.
- Attribution: first-touch for CAC and cohort channel; last-touch shown separately for campaign optimisation.
- Quality checks: order-to-payment reconciliation (±0.5%), spend-to-GL reconciliation, duplicate customer merge by hashed phone/email.
- Fiscal calendar: April–March (Q1 = Apr–Jun). Festive season flagged Oct–Nov for like-for-like comparisons.

Note: targets shown are illustrative placeholders for a fictional company.

INSIGHTS

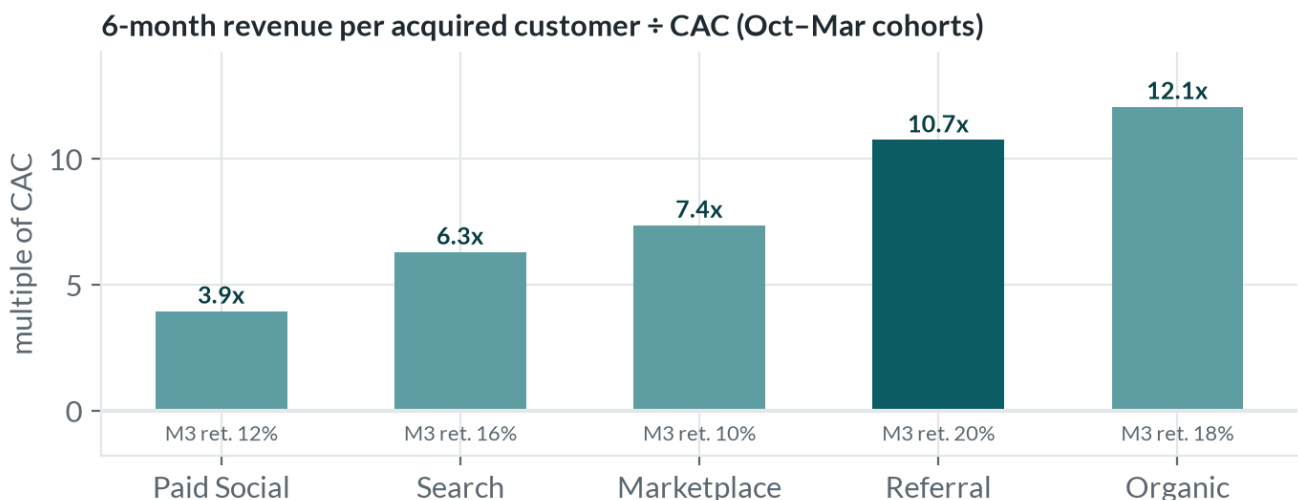
What the numbers are saying

1 • Paid social is scaling, but with diminishing returns



Paid-social CAC climbed steadily (+64% over the year) as audiences saturated, while search was broadly stable and marketplace and referral were flat. Because paid social is the largest acquisition channel, it is pushing blended CAC up even as volumes grow.

2 • Unit economics differ sharply by channel



Referral and organic customers generate more revenue per rupee of acquisition cost and retain better at month 3. Organic cannot be bought directly, so referral (highlighted) is the scalable lever. Paid social returns 3.9x CAC in its first 6 months, which is thin once gross margin and returns are applied.

3 • Retention improved after the loyalty launch; South leads growth

The cohort heatmap shows month-1 retention lifting for cohorts active after May 2026, and repeat rate rising from 57.1% to 64.0%. South revenue grew +43% H2 vs H1, with higher AOV; East remains the weakest region on both growth and basket size.

RECOMMENDATIONS

Five moves for the next two quarters

#	Action	Owner	Expected impact	Effort	When
1	Re-allocate 20% of paid-social budget to referral rewards and retention journeys	Growth	Blended CAC -8 to -12%	Low	Next 30 days
2	Set channel CAC guardrails (e.g. paid social $\leq$ INR 650) with weekly alerting	Growth + Data	Stops runaway spend early	Low	Next 30 days
3	Extend loyalty programme: tiered rewards, second-order nudge at day 21	CRM	Repeat rate +3 to +5 pts	Medium	Q3 FY27
4	Double down on South: regional creatives, faster delivery SLAs	Marketing + Ops	South revenue +15%	Medium	Q3 FY27
5	East basket-building: bundles and free-shipping threshold test	Category	East AOV +6%	Low	Q3 FY27

How we will know it worked

- Monthly MIS tracks blended and channel CAC against guardrails, with variance commentary.
- Cohort heatmap reviewed monthly: success = M1 retention $\geq$ 25% and M3 $\geq$ 15% for new cohorts.
- Budget shift run as a geo-split test for 6 weeks before full roll-out, so the effect is measured rather than assumed.

What this sample includes

- Live dashboard (Power BI / Looker Studio / Metabase) built on the KPI dictionary above.
- Monthly MIS pack: 6–8 slides with automated commentary and variance flags.
- Data model and SQL / Python transformation scripts, documented and handed over.
- A 60-minute walkthrough and a 30-day support window.

About this sample: Northwind Retail is a fictional company. All customers, orders, spend and targets were generated synthetically (123,957 new customers in-window on a simulated 24-month base, 356,385 orders) by the accompanying Python script, for portfolio illustration only. Prepared by Shashwat Kumar as an illustrative work sample on synthetic data.