

Case Study II. Saran Pilates - Strategic KPI Automation & Insight Development

“Bree did an incredible job analyzing the financials for my business. He presented everything so clearly and made the numbers easy to understand, which gave me the clarity and confidence I needed to make smarter business decisions. I’m so grateful for his thoroughness and insight!”

-Gabrielle Saran, Founder of Saran Pilates

Client Overview

Saran Pilates is a fitness business offering online Pilates instruction and subscription-based video content. With a growing subscriber base, the business sought deeper insights into key performance indicators (KPIs) such as Customer Acquisition Cost (CAC), Lifetime Customer Value (LCV), and Trial Conversion Rate.

Objective

Determine critical KPIs and automate the collection and reporting of these numbers:

- Customer Acquisition Cost (CAC)
- Lifetime Customer Value (LCV)
- Ad Spend ROI
- Trial Conversion Rates and Churn
- Subscriber Growth Analysis

Approach

Leveraged APIs from Vimeo OTT and QuickBooks to design a fully automated, real-time KPI dashboard. Integrated API-driven data directly into customized Google Sheets for live updates on performance metrics, minimizing manual effort and enhancing data accuracy.

Tools Utilized

- **Vimeo OTT API:** Pulled subscriber and trial data for detailed conversion analytics.
- **QuickBooks API:** Pulled P&L data for CAC, LCV, and Ad Spend ROI calculations.
- **Google Apps Script:** Developed automated processes to:
 - Weekly retrieve subscriber metrics.
 - Aggregate and transform data into actionable monthly KPIs.
 - Continuously calculate metrics such as CAC and LCV without manual intervention.

Outcome & Benefits

- **Real-Time Visibility:** Continuous, reliable access to performance metrics.
- **Accurate KPIs:** Automated systems eliminated manual calculation errors, ensuring accuracy and consistency.
- Enabled **data-driven decision-making**, highlighting opportunities in subscriber retention and targeted marketing.

Skills Demonstrated

- Data Automation & Integration
- API Integration (Vimeo OTT & QuickBooks)
- Advanced Spreadsheet & Google Apps Script Development
- Business Intelligence & KPI Analysis
- Strategic Insights & Recommendations

Tools & Technologies Used

- Vimeo OTT API
- QuickBooks API
- Google Sheets & Google Apps Script
- JavaScript/JSON Data Handling
- Excel for Reporting & Analysis

Select Figures from the Saran Pilates Project

Fig. 1 KPIs - Automatically Updating

Lifetime Customer Value (LCV)

Churn Rate

Conversion rate (from free trial to membership)

Value of Acquired Trial

Retention (average tenure in months)

Cost of Acquiring a Customer (CAC)

Ad Spend ROI

Current Daily Growth Rate

Current Daily Value from New Clients

Fig. 2 Data Map Linking to Spreadsheet Tabs & External Data Sources

Tabs

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Data Sources

LCV	-->	Net Rev Total Subscribers Churn Rate	Rev per Subscriber Tab Total Subscribers Tab Churn Rate Tab
CAC	-->	New Trials Ad Spend Conversions	Conversions Tab Inverted P&L Tab Conversions Tab
Conversions	-->	New Trials Trial Conversion Rate LCV	New Trials Tab Conversion Rate Tab Numbers at a Glance Tab
Rev per Subscriber	-->	Net Subscriber Rev Total # Subscribers	Inverted P&L Tab Total Subscribers Tab
Inverted P&L	-->	Transposed P&L Tab	
New Trials	-->	Raw New Trials Tab	
Conversion Rate	-->	Raw Conversion Rate Tab	
Subscribers Lost	-->	Raw Monthly Subscribers Lost Tab	
Churn Rate	-->	Raw Churn Rate Tab	
Total Subscribers	-->	Raw Total Subscribers Tab	
Transposed P&L	-->	Formatted P&L Tab	
Formatted P&L Tab	-->	Mapped P&L Tab	
Mapped P&L	-->	Raw P&L Tab & Mapping Key Tab	
Mapping Key			
Raw P&L	-->	Quickbooks Custom Reports	All Time P&L
Raw New Trials	-->	Vimeo Subscribers Report	Raw New Trials
Raw Conversion Rate	-->	Vimeo Subscribers Report	Raw Conversion Rate
Raw Churn Rate	-->	Vimeo Subscribers Report	Raw Churn Rate
Raw Total Subscribers	-->	Vimeo Subscribers Report	Raw Total Subscribers
Raw Monthly Subscribers Lost	-->	Vimeo Subscribers Report	Raw Monthly Subscribers Lost