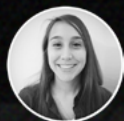




hanapin marketing

30 Excel Tricks To Save Your PPC Life



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Account Manager*

Data Driven Reach. Human Driven Impact.

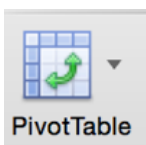
30 Excel Tricks To Save Your PPC Life

IN THE PPC WORLD, EXCEL IS A GIVEN

PPC and Excel go hand in hand. Like peanut butter and jelly. Not only will you become better at analyzing account performance, but you'll also save a lot of precious time by becoming savvy with Excel and all of its features, formulas, and shortcuts. This whitepaper will list out handy Excel features and tricks, as well as examples of how to use them for your PPC endeavors.

TRICK #1 – PIVOT TABLES

Pivot tables might be the most important Excel feature that gets used daily in PPC work.



Simply click that button and Excel will put your data into a pivot table. Then you can start manipulating data in any way that you choose.

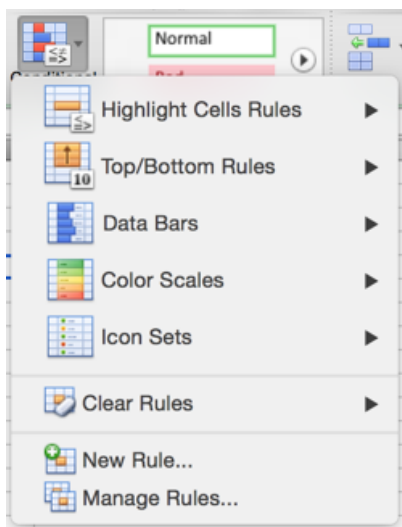
Use It For:

- **General Account analysis**

Helpful Hint: Use calculated fields for metrics like cost/conversion, CTR, and conversion rates.

TRICK #2 – CONDITIONAL FORMATTING – HEAT MAPPING

Conditional formatting is great to get quick insights from a set of data. There are multiple pre-set rules that you can use, or you can create a custom rule.



Hour of day	CTR	Cost	Converted clicks	Click conversion rate	Cost / converted click
0	0.76%	88.21	0	0.00%	0
1	0.69%	76.16	1	1.45%	76.16
2	0.99%	94.93	1	1.06%	94.93
3	1.08%	85.84	1	0.79%	85.84
4	0.88%	137.4	1	0.60%	137.4
5	1.04%	251.44	1	0.36%	251.44
6	1.02%	384.09	3	0.83%	128.03
7	0.86%	630.6	7	1.11%	90.09
8	0.78%	507.43	3	0.62%	169.14
9	0.73%	503.29	3	0.63%	167.76
10	0.61%	393.9	4	0.96%	98.48
11	0.65%	426.42	3	0.62%	142.14
12	0.65%	396.94	3	0.55%	132.31
13	0.67%	462.5	6	0.97%	77.08
14	0.63%	440.44	3	0.57%	146.81
15	0.63%	338.18	1	0.20%	338.18
16	0.66%	342.17	3	0.54%	114.06
17	0.63%	363.2	4	0.67%	90.8
18	0.58%	295.51	5	0.76%	59.1
19	0.54%	307.2	2	0.30%	153.6
20	0.50%	281.5	3	0.49%	93.83
21	0.50%	194.15	2	0.74%	97.08
22	0.48%	148.92	2	0.93%	74.46
23	0.54%	140.83	3	1.72%	46.94
Total	0.65%	7,291.25	65	0.68%	112.17

Here we show a heat map of conversion metrics by time of day. By applying the conditional formatting, we can easily pick out any times that aren't performing well and set a bid adjustment accordingly.

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Hour of day	Cost / converted click
0	0
1	76.16
2	94.93
3	85.84
4	137.4
5	251.44
6	128.03
7	90.09
8	169.14
9	167.76
10	98.48
11	142.14
12	132.31
13	77.08
14	146.81
15	338.18
16	114.06
17	90.8
18	59.1
19	153.6
20	93.83
21	97.08
22	74.46
23	46.94
Total	112.17

If you don't want to highlight the entire cell in one color, choose the icon option.

Use It For:

- Dayparting
- Visualizing data

TRICK #3 – VLOOKUP

```
=vlookup(  
VLOOKUP(lookup_value, table_array, col_index_num, [range_lookup])
```

I use VLOOKUP very frequently to (you guessed it) look up a value on a separate sheet in my workbook. This is great for compiling data from two different reports.

TRICK #4 – INDEX MATCH

Index match is another way to look up data using both the Index function and the Match function nested together. The perk of using Index Match vs. VLOOKUP, is that Index Match can read left or right, while VLOOKUP can only read to the right.

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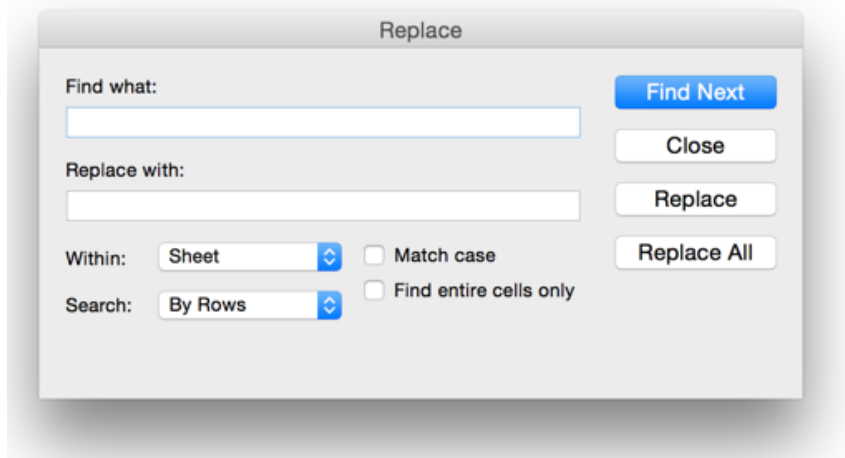
In this example, the function listed would return “yellow”.

Favorite Color	Name
Blue	Tom
Green	Anne
Yellow	Leslie
Orange	Jerry
Purple	Andy

=index(C9:C13,match("Leslie",D9:D13,0))

INDEX(array, row_num, [column_num])
INDEX(reference, row_num, [column_num], [area_num])

TRICK #5 – FIND & REPLACE



Helpful Hint! Command+F = Find function. From there, you can replace what you're looking for with something else.

Use It For:

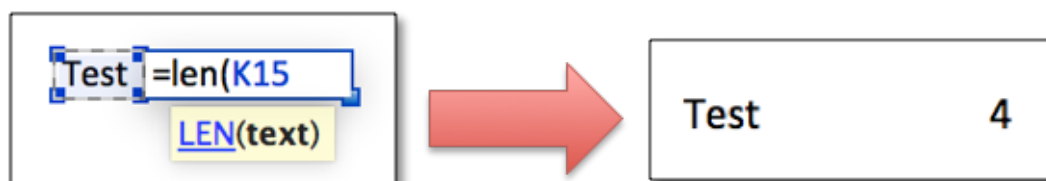
- Making keywords BMM (Find “ ” and Replace with “ +”)
- Keyword buildouts
- Changing URLs

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TRICK #6 – LENGTH

Have you ever been writing ad copy and just can't quite get the right number of characters in each line? Don't fret; you can use the length function to calculate how many characters are in a cell.

Helpful hint! Use conditional formatting (listed above) to automatically highlight cells that are over the allotted character count.



Use It For:

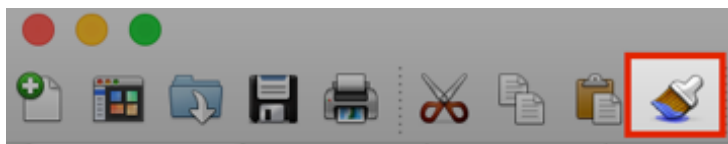
- Ad writing

TRICK #7 – TEXT-TO-COLUMN

Text-to-column is a neat little tool to help you separate data that's contained in one column. Two of the most practical uses I have found for this function are manipulating destination URLs and splitting campaign names.

For example, if I structure my account like this: State – Theme – Match Type, then I can use Text-to-column to easily pivot my data by one of the three categories.

TRICK #8 – FORMAT PAINTER



You've probably wondered what that little paintbrush icon is up in your toolbar in Excel. This tool allows you to copy the formatting from one (or many) cells and copy it to another.

Helpful hint! Double-click the icon and you can paste the formatting on multiple selections.

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TRICK #9 – FREEZE PANES

We've all been in a situation where you have a huge Excel file with tons of info. The problem is, you can't scroll down and still see your headers. All you have to do is Freeze your header row and voila, it'll stick! No more frantic scrolling back to the top to remind yourself what those numbers mean.

Use It For:

- *Viewing large amounts of data*
- *Making reports more client friendly*

TRICK #10 – CUSTOM SHORTCUTS

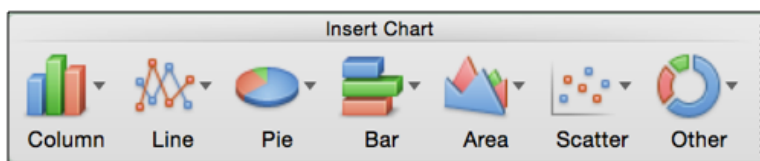
Do you love using shortcuts? Sometimes the preset shortcuts don't work for you, or you want to create a shortcut for a feature that doesn't have one by default.

Navigate to: Tools > Customize Keyboard, then scroll through the various categories of available shortcuts.

Use it for:

- *Freeze panes, format painter*

TRICK #11 – CHARTS & GRAPHS



Charts and Graphs are great to show to clients, and can be very helpful in recognizing trends to figure out what's happening in your account. Select the data you want to represent in a graph or chart, and select the chart layout you want.

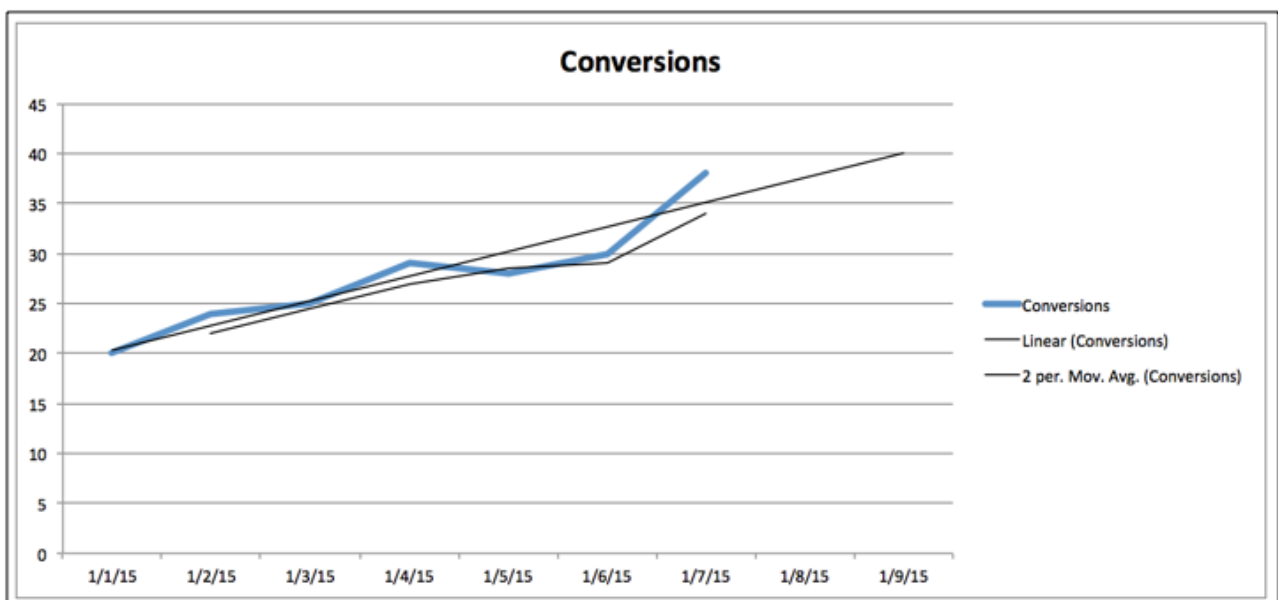
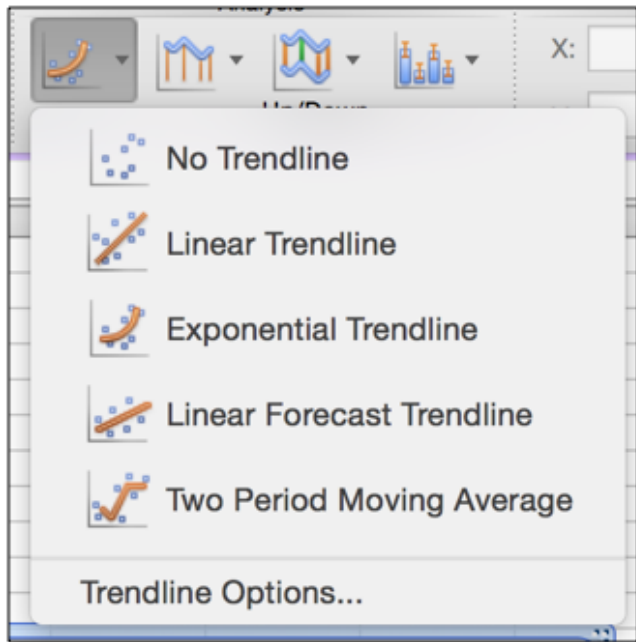
Use it for:

- *Visualizing data*
- *Creating client-facing reports*
- *Analyzing your account and uncovering trends*

30 Excel Tricks To Save Your PPC Life

TRICK #12 – TRENDLINES

Now that we've gone through how to create graphs, adding a trendline is a great way to quickly see an overall performance trend. As you can see here, there are a few different options as to what kind of trendline you would like to use:



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TRICK #13 – MACROS

Macros are a recorded series of actions that can automate simple tasks. For example, here at Hanapin we frequently use account snapshot macros that give the user a quick overview of number of keywords, match types, and quality scores across the account.

Use it for:

- *Analyzing your whole account!*

TRICK #14 – CONCATENATE

This function allows you to combine the contents of multiple cells.



TRICK #15 – THE "&" OPERATOR

Similarly to concatenate, using the "&" allows you to combine cells.



Helpful hint! Use " " to include a space.

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TRICK #16 – FILTERS



To enable filters, click the icon that looks like a funnel (pictured to the left). This will allow you to filter your data by any column of your choosing.

Use this for sifting through keyword reports, campaign reports, or any other report you might export from AdWords and/or Bing.

TRICK #17 – SPELL CHECK

The Spell Check feature is located in the Review tab. Click the Spelling button and Excel will go through the sheet and suggest corrections.

Use it for:

- *Ad writing*
- *Double checking client-facing reports*

TRICK #18 – CAPITALIZATION

Excel has functions built-in that will automatically change the capitalization of the text in a cell. These are:

Function	Before	After
Upper	blue dog	BLUE DOG
Lower	BLUE Dog	blue dog
Proper	blue dog	Blue Dog

Use it For:

- *Ad writing*

TRICK #19 – TRIM

The Trim function deletes extra spaces before and after the words in a cell. For example, if you have “ free shipping today only “, Trim will change it to “free shipping today only”. Those extra spaces can be quite frustrating, because you might not necessarily see them, but they use up some of that precious character count for ad copy.

Use It For:

- *Ad Writing*

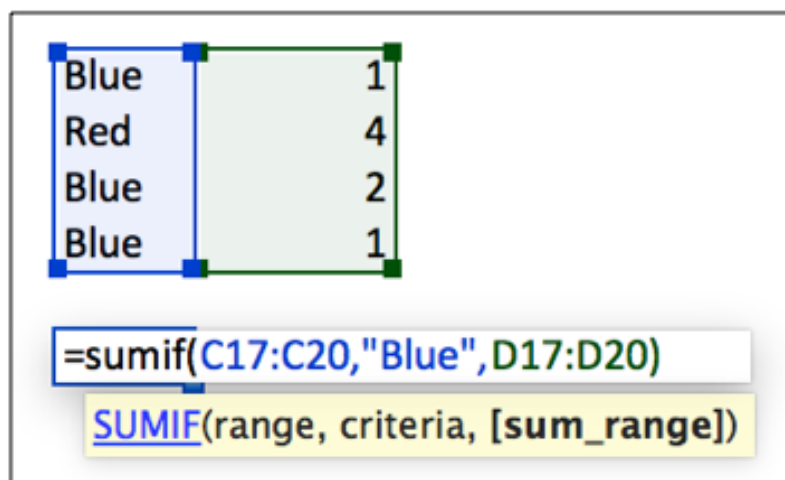
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TRICK #20 – REMOVE DUPLICATES

Another useful feature from the Data tab is the remove duplicates function. It does exactly what you would expect it to. Simply select the column(s) that you would like to de-dupe and voila, duplicates-be-gone!

TRICK #21 – SUMIF

SUMIF allows you to sum the values of a range of cells, given that they meet the criteria you specify.



The image shows a screenshot of an Excel spreadsheet. The data is as follows:

Blue	1
Red	4
Blue	2
Blue	1

Below the spreadsheet, the formula `=sumif(C17:C20,"Blue",D17:D20)` is shown in a blue box. Below that, the syntax `SUMIF(range, criteria, [sum_range])` is shown in a yellow box.

TRICK #22 – COUNTIF

Countif works the same way that Sumif does, but it counts the number of non-empty cells rather than summing the values.

TRICK #23 – IF FUNCTIONS

The IF function returns one value if a condition you specify evaluates to TRUE, and another value if that condition evaluates to FALSE. [Click here for more info on IF.](#)

TRICK #24 – GROUPING

Grouping does exactly what it sounds like: it groups rows or columns together.

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The most frequent use of grouping that I've seen is calculating your optimal average position. To do this, download a campaign or keyword report segmented by week (or day). Then, create a pivot table with Average Position as your Row Label. Then select the rows, right click, and click "group".

The screenshot shows an Excel pivot table with the following data:

Row Labels	Sum of Cost	Sum of Converted clicks	Sum of Clicks	Sum of Impressions
0		1	0	
1		1	4	
1.1		1	72	
1.2		1	29	
1.3		1	109	
1.4		1	134	
1.5		1	45	
1.6		1	67	
1.7		1	584	
1.8		1	233	
1.9		1	58	
2		1	97	
2.1		1	40	
2.2		1	2784	
2.3		1	27	
2.4		1	1312	
2.5	178.12	1	40	
2.6	158.64	0	39	
2.7	173.02	0	58	
2.8	179.64	1	97	

Row Labels	Sum of Cost	Sum of Converted clicks	Sum of Clicks	Sum of Impressions
0-1	\$ -	0	-	-
1-2	\$ 2,305.86	9	584	43,781
2-3	\$ 15,753.09	49	4,694	431,533
3-4	\$ 601.86	2	233	23,524
4-5	\$ 7.71	0	5	154
Grand Total	\$ 18,668.52	60	5,516	498,992

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TRICK #25 – WRAP TEXT

Got some lengthy text in a cell, but still want all the words to be visible? Just click on the Wrap Text button. Use this to make client facing excel documents more presentable and easy to read.

TRICK #26 – TEMPLATES

Templates make Excel work go much quicker if you have a template pre-made. Templates for bid changes and ad writing are among the most frequently used. Simply set up the “shell” of the worksheet that includes the formulas used, and then paste in your updated data.

Here’s an example of an ad writing template that automatically has length counters that are conditionally formatted to turn red if your line is over the character limit.

Campaign	Ad Group	Headline	Length	Description Line 1	Length	Description Line 2	Length
		Example Headline	16	This Description Line Is Way Too Long!	38	This Line Is Just The Right Length.	35

TRICK #27 – ANCHOR CELLS

Say you want to want to reference a single cell for a whole column of calculations. Obviously you want to fill the formula down, but you want Excel to still reference that one cell. To do this, place a \$ before each aspect of the cell reference you want to anchor. For example: $\$A\14 will always reference that cell, but $\$A14$ will only reference the A column, and the row will change as you move the formula.

TRICK #28 – PROJECTIONS

Excel makes projections easy. Typically the formula used is $MTD + ((Last\ 7/7) * Days\ Left\ In\ Month)$. This can be used for cost, conversions, clicks, whichever metric you want. The beauty in using Excel, is that once you set up the basic formula, you can copy and paste in your data and it will automatically calculate it for you!

Last 7 Cost:	\$ 1,400.00
MTD Cost:	\$ 2,300.00
Today:	1/7/15
Month End:	1/31/15
Days Left:	25
Projected Cost:	$=C7+((C6/7)*C11)$

Helpful Hint! Use the =today() function to automatically insert today's date, and set Days Left to subtract today from month end, and add 1 to include today.

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TRICK #29 – SOLVER

Excel solver uses given parameters and limits to minimize or maximize a column/cell based on existing data.

Use it for:

- *Calculating campaign budgets*

TRICK #30 – NESTED FUNCTIONS

Sometimes one function just won't cut it. Luckily, Excel allows you to "nest" functions inside each other.

Cost	Conversions	CPL	Bid Change
\$ 143.00	4	\$ 35.75	1.1
\$ 100.00	0	\$ -	0.9
\$ 143.00	1	\$ 143.00	0.9

Bid Change Formula: `=IF(AND(C8>1,D8<40),1.1,IF(B8>99,0.9))`
`IF(logical_test, [value_if_true], [value_if_false])`

In this example, I've nested an AND function inside of the IF function. We want both the number of conversions to be greater than 1, and CPL to be below \$40 for the keyword to get a 10% bid adjustment. Keywords that either have a CPL over \$40 or have spent over \$99 without converting get a -10% adjustment.

BECOME AN EXCEL EXPERT

Becoming Excel savvy will not only help you do account work and analysis better, but you'll work faster too. It might take an initial investment of time to learn which functions and/or features are useful for which task, but you'll reap the rewards long after you've mastered these Excel functions.

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