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Customer lifetime value spreadsheet formula card

Every formula from the guide, for Excel and Google Sheets, on one page.

Sheet "Sales"

Column A: date. Column B: customer (name or ID, spelled the same every time). Column C: amount. Row 1 holds headers; data from row 2.

Sheet "Summary" — cells

Cell	What	Formula (Excel and Sheets unless noted)
B1	Start of period 1	a date, e.g. 1 Oct 2024
B2	Start of period 2	=EDATE(B1,12)
B3	End of period 2	=EDATE(B1,24)
B5	Revenue, period 2	=SUMIFS(Sales!C:C,Sales!A:A,">="&B2,Sales!A:A,"<"&B3)
B6	Sales, period 2	=COUNTIFS(Sales!A:A,">="&B2,Sales!A:A,"<"&B3)
B7	Customers, period 2	=COUNTIF(Customers!E:E,TRUE)
B8	Average sale	=B5/B6
B9	Purchases per customer per year	=B6/B7
B10	Retention	=COUNTIFS(Customers!D:D,TRUE,Customers!E:E,TRUE)/COUNTIF(Customers!D:D,TRUE)
B11	Yearly churn	=1-B10
B12	Lifespan (years)	=1/B11
B13	Gross margin	type it, e.g. 60%
B14	**Customer lifetime value**	**=B8*B9*B12*B13**

Sheet "Customers" — one row per customer

Col	What	Formula in row 2
A	Customer list	Excel 365: =UNIQUE(FILTER(Sales!B2:B5000,Sales!B2:B5000<>"")) Sheets: =UNIQUE(FILTER(Sales!B2:B,Sales!B2:B<>""))
B	Lifetime revenue	=SUMIFS(Sales!C:C,Sales!B:B,A2)
C	Purchases	=COUNTIFS(Sales!B:B,A2)
D	Bought in period 1?	=COUNTIFS(Sales!B:B,A2,Sales!A:A,">="&Summary!$B$1,Sales!A:A,"<"&Summary!$B$2)>0
E	Bought in period 2?	=COUNTIFS(Sales!B:B,A2,Sales!A:A,">="&Summary!$B$2,Sales!A:A,"<"&Summary!$B$3)>0

Copy B to E down as far as the customer list goes. Check once against fynl.io/customer-lifetime-value-calculator.

The full guide: fynl.io/blog/customer-lifetime-value-excel/ Free CLV calculator: fynl.io/customer-lifetime-value-calculator