

BI Infrastructure set-up

Industrial parts manufacturing company

Developed various sales dashboards and balanced score card on Tableau to track key business performance metrics across product and customer categories by integrating data from discrete sources and reconciling with Financial reports

Industrial parts manufacturer needs state-of-the-art BI Infrastructure set-up

Picture this...

You’re looking for the consolidation of data across systems, reconcile the differences across systems and create dashboards to provide visibility into business performance by region, customer and product categories

You turn to Accordion.

We partner with your team to develop various sales dashboards and balanced score cards on Tableau to track key business performance metrics across product and customer categories by integrating data from discrete sources and reconciling with Financial reports, including:

- 1) Developing a deep understanding of the client data systems across entities (resulting from inorganic growth) to understand the integration between orders, products and customer information
- 2) Reconciling the differences in sales across data systems to establish a single source of truth for the top management
- 3) Building dynamic reporting dashboards on Tableau to review business performance by region, product and customer category for various periods such as MTD, YTD Last Twelve Months (LTM) and Full year.
- 4) Providing flexibility to drill down to specific regions, products and customers, for the middle management to investigate key trends

Your value is enhanced.

You have enabled the client to identify gaps in data capture and streamlined the processes required to establish a reliable reporting infrastructure. You have automated dashboards help visualize real-time data and provided visibility into business performance and its drivers across entities and product lines.

KEY RESULT

- Impact 1...
- Impact 2...

VALUE LEVERS PULLED

- Data integration
- KPI definitions
- BI dashboards

Reporting infrastructure set-up

Situation

- Due to inorganic growth, the company had discrete and scattered data systems for capturing pricing information for the customized product lines across entities
- Partnered with the client to consolidate the data across systems, reconcile the differences across systems and create dashboards to provide visibility into business performance by region, customer and product categories

Accordion Value Add

- Developed a deep understanding of the client data systems across entities (resulting from inorganic growth) to understand the integration between orders, products and customer information
- Reconciled the differences in sales across data systems to establish a single source of truth for the top management
- Built dynamic reporting dashboards on Tableau to review business performance by region, product and customer category for various periods such as MTD, YTD Last Twelve Months (LTM) and Full year.
- Provided flexibility to drill down to specific regions, products and customers, for the middle management to investigate key trends

Impact

- Enabled the client to identify gaps in data capture and streamline the processes required to establish a reliable reporting infrastructure
- Automated dashboards helped visualize real-time data and provided visibility into business performance and its drivers across entities and product lines

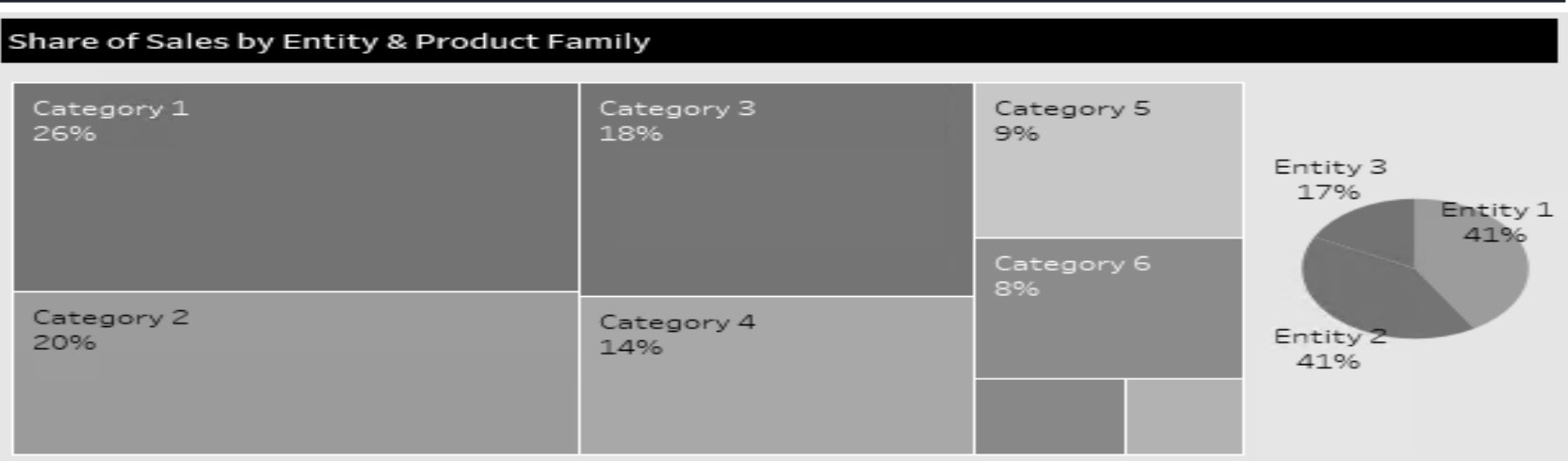
Balanced scorecards reporting the key metrics of business performance

Balanced Score Card					Glossary	
Customer	Net Promoter Score73		Order to sales (Book to bill) LTM1.12		No. of RMAs, YTD3,173	
	Prior year	65	Prior LTM	1.05	Prior year	3,322
	Target	70	Target	1.1	Target	2,840
Product	New product sales-to-goal %94.2%		Sales growth by Product line YoY13.2%		Bundled sales as % of all orders, LTM63.3%	
	Prior year	93.7%	Prior Year	8.6%	Prior LTM	58.2%
	Target	100.0%	Target	10.0%	Target	75.0%
People	Employee Satisfaction Score3.0		Recordable workplace safety incidents YTD24		Employee turnover15.6%	
	Prior year	2.8	Prior month YTD	21	Prior Year	18.3%
	Target	2.5	Target	0	Target	7.0%
Operations	On-time delivery, YTD82.3%		Gross Margin Rate Improvement, YTD1.1%		Operating expense ratio improvement percentage, YTD-0.6%	
	Prior year	78.6%	Prior Year	0.8%	Prior Year	-0.4%
	Target	100.0%	Budget	1.4%	Budget	-1.2%
Finance	Top line growth % YoY13.2%		EBITDA Percentage Growth, YTD13.8%		Working Capital as a % of Sales, YTD32.70%	
	Prior Year	8.6%	Prior Year	11.4%	Prior Year	30.20%
	Target	10.0%	Budget	9.2%	Target	24.00%

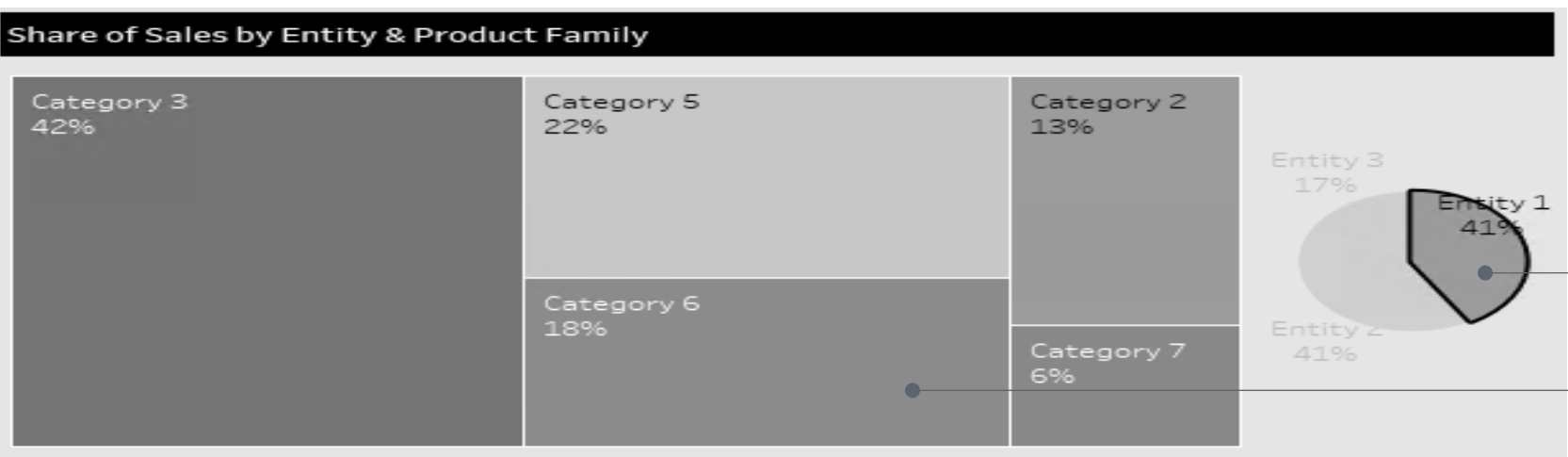
Grid view of key performance indicators along with prior year values and targets specified for quick comparison

Interactive visualization through user selections enables a deep-dive on the trends

Before a selection



After a selection



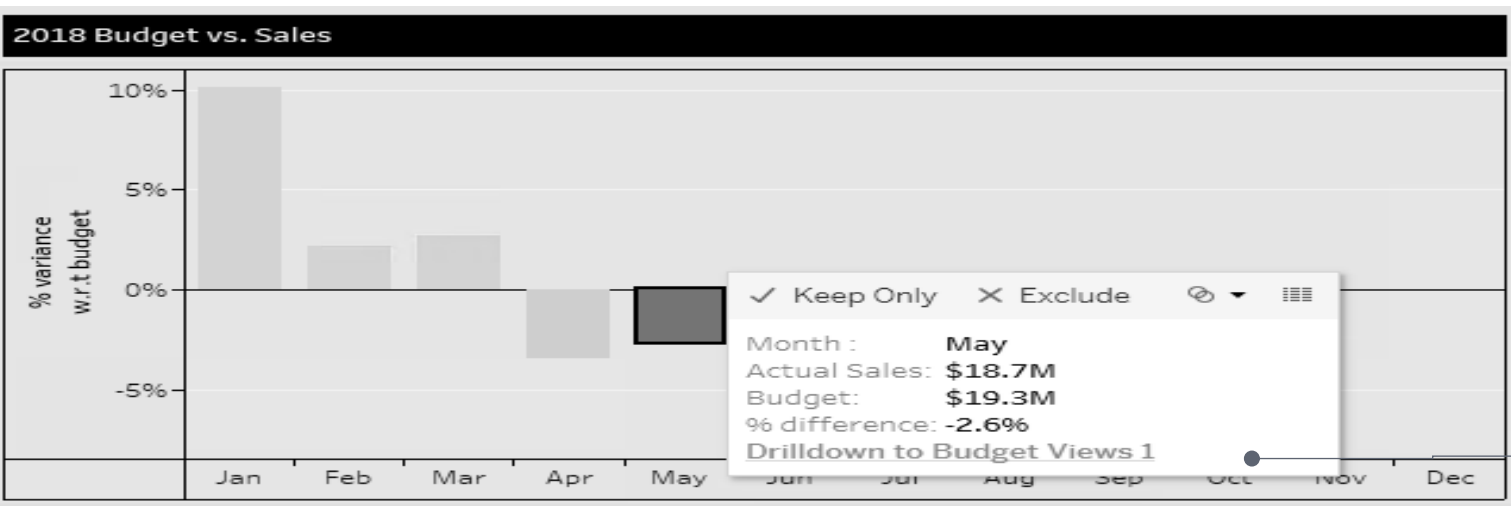
Selection on a pie chart that automatically updates the adjacent chart

Updated chart based on the selection in adjacent chart

Flexibility to drill down and investigate the drivers of performance helps identify areas that need attention

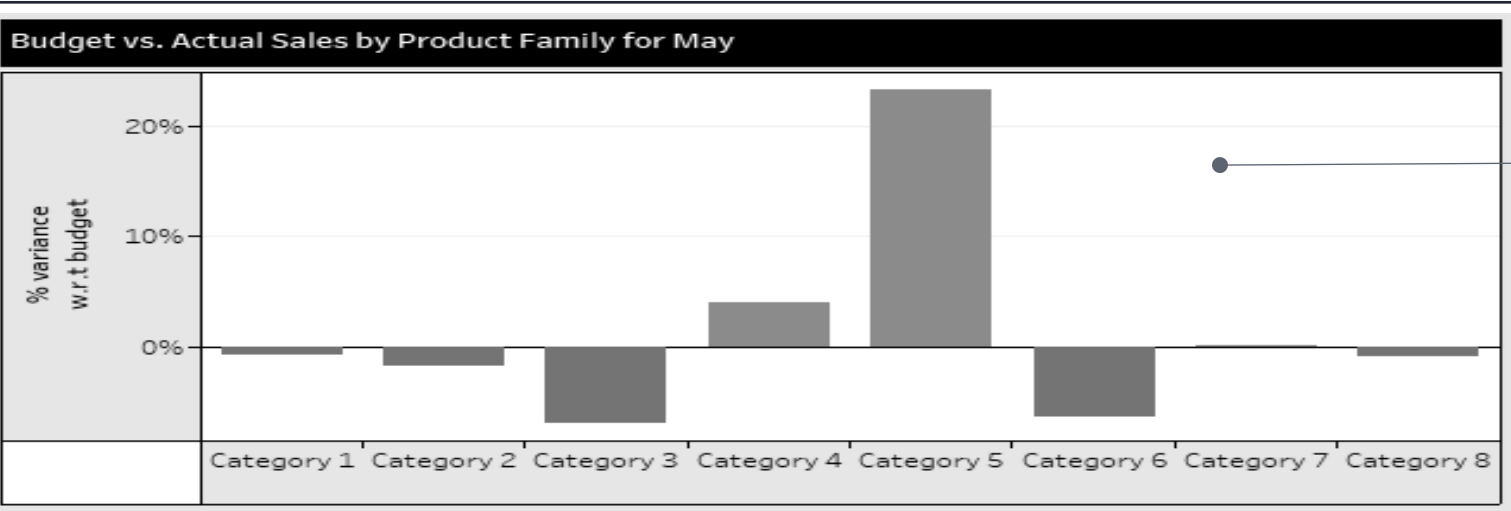
ILLUSTRATIVE

Top-down view



User can select the view to drill-down for understanding the variance for a particular month

Drill-down view



The drill-down view provides directional guidance regarding the category that led to the variance in the selected month

Option to choose the required dimension of a metric enables business users to evaluate performance from different perspectives

ILLUSTRATIVE

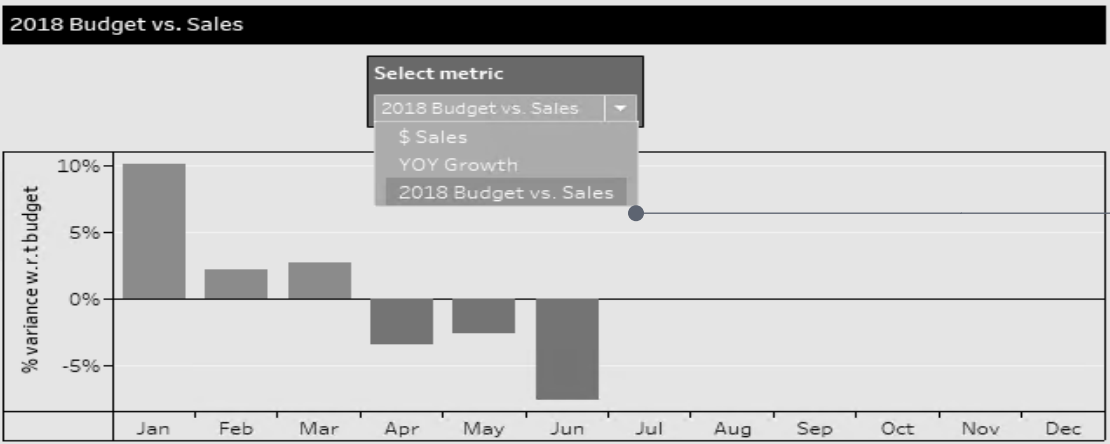
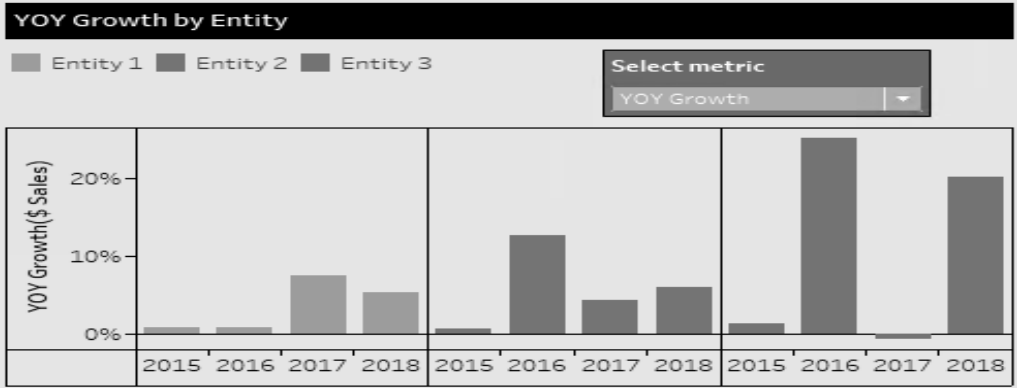
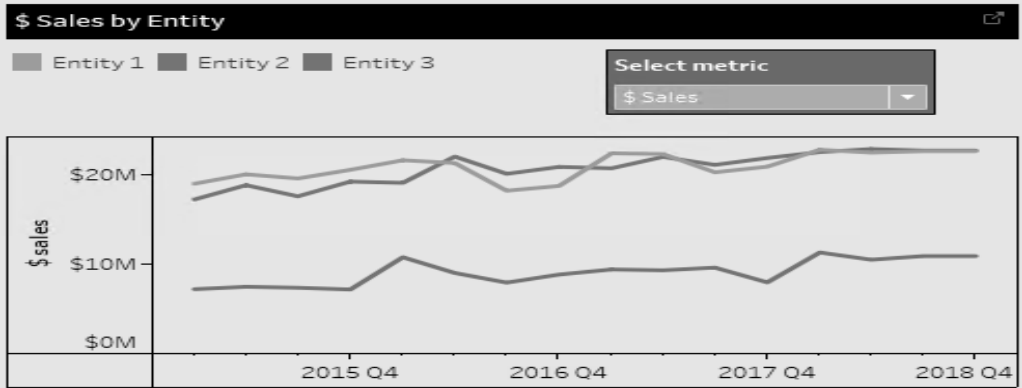


Chart can be changed to view the required metrics on the dashboards

Metric selection from the dropdown

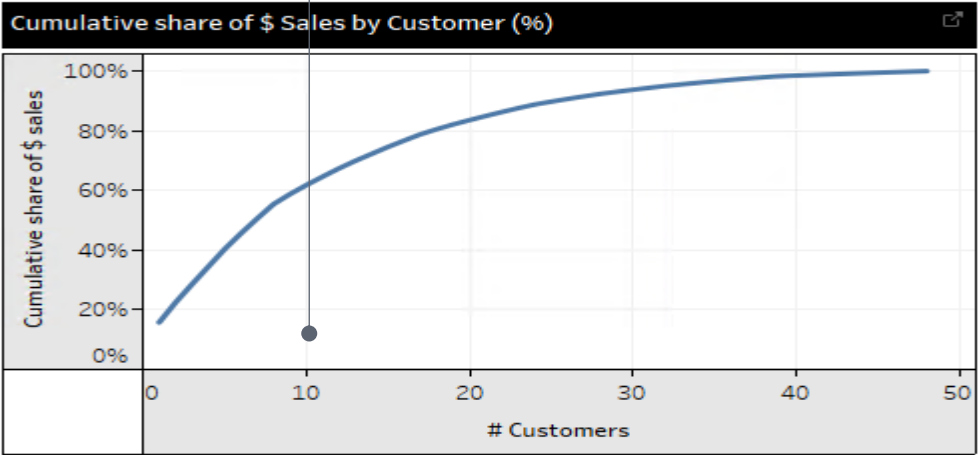


Pareto charts, scatter plots, tabulations and maps help visually represent various aspects of business performance

ILLUSTRATIVE

A pareto chart to determine the distribution of customers contributing to the top percentile of the sales

Pareto chart



A scatter plot to segment customers into quadrants based on YoY growth and \$ sales

Scatter plot

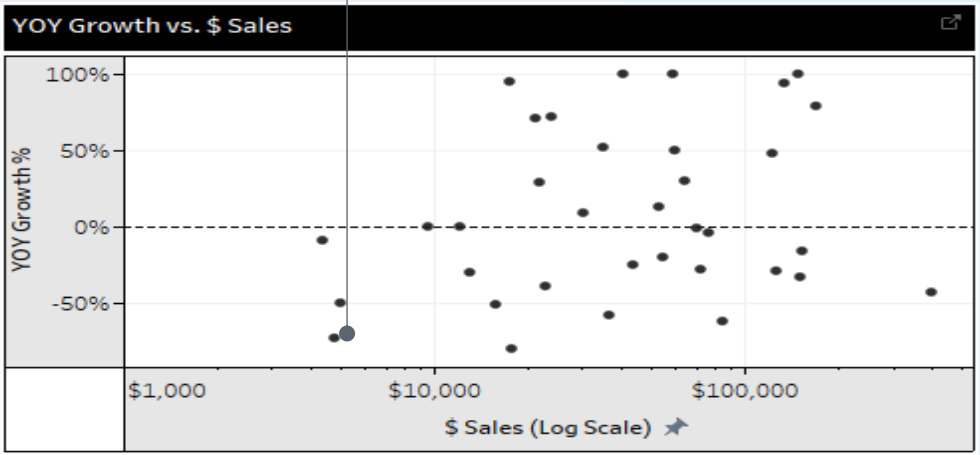


Table chart with search Option

Name Search

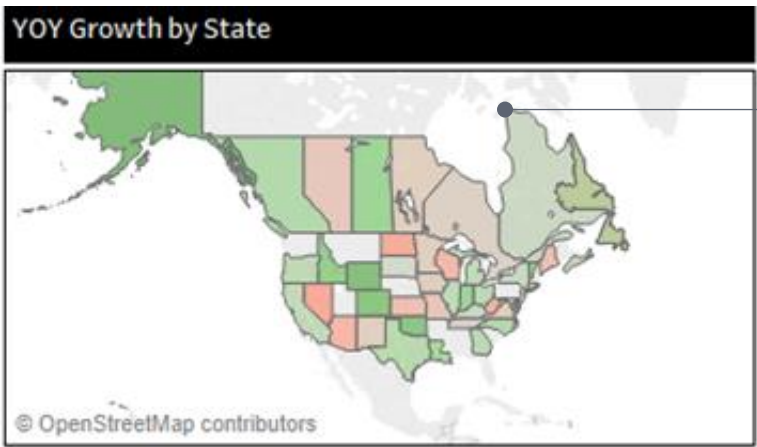
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A tabular view to search and evaluate a specific customer's sales trends

Top Customer \$ Sales & YOY Growth

Rank	Name	\$ sales	YOY
1	Customer 1	\$6,403,552	2.13%
2	Customer 2	\$6,293,316	-0.32%
3	Customer 3	\$5,624,381	25.29%
4	Customer 4	\$3,765,071	21.46%
5	Customer 5	\$3,466,445	-23.35%

Map chart



A map depicting sales growth across regions

