



# Performance tracking & reporting

(Cosmetics company)

Built executive level performance dashboards and reports at regional, retailer and product category level, by aggregating SKU level data and expense level data from multiple databases and retailers

# Performance tracking and reporting

## Situation

- Company received sales reports from retailers, but did not have clear visibility into channel, retailer & SKU performance, and standardized KPIs at regular cadence, which was impacting budgeting and forecasting activities
- Partnered with the client team on a long-term basis to develop the performance trackers and executive-level dashboards for tracking SKU level performance by revenue channel and customer

## Accordion Value Add

- Developed 28 distinct Performance trackers to help track sales & expenses and to determine updated forecasts
- Captured the actual performance and variance against annual budget and against prior year for key metrics (e.g., Units Sold, Dollar Sales, Average Price, Newness sales etc.) by Door, Channel, Retailer, SKU etc.
- Developed streamlined and robust process for periodic (weekly or daily) update of the trackers including data cleansing and consolidation of raw sales data from different retailers
- Created consolidated report tracking department specific P&L for over 25 departments to identify the variance to annual budget and to revise forecasts monthly

## Impact

- Our trackers provided the company with a granular and structured view of the business performance
- This helped them to identify SKUs and channels to focus on, to address the performance issues
- Revised monthly forecasts enable the company to plan the operations more efficiently

# Reports categorization



## Budgeting

- Enable tracking of performance against budget and provide revised updated forecasts for SKU sales and department specific expenses monthly. The forecasting is based on the SKU level, YTD sales & seasonality.
- Help identify critical focus areas, by comparing latest FY SKU & store level forecasts vs. Annual budget to identify under-performing product groups & channels



## Sales dashboards & reports

- Track performance at a store level for brick-and-mortar domestic retailers through multiple weekly and monthly reports on SKU sales
- Track performance by channel and tariffs for international retailers through weekly retailer specific sales reports & a monthly “consolidated international sales report”
- Track performance of e-commerce retailers and website sales through the weekly e-commerce sell-through report
- Track performance & shipments of new and legacy skus to identify under-performing skus by channel and retailer
- Summarized executive level view of the performance vs. LY & budget through the weekly ‘dashbook’

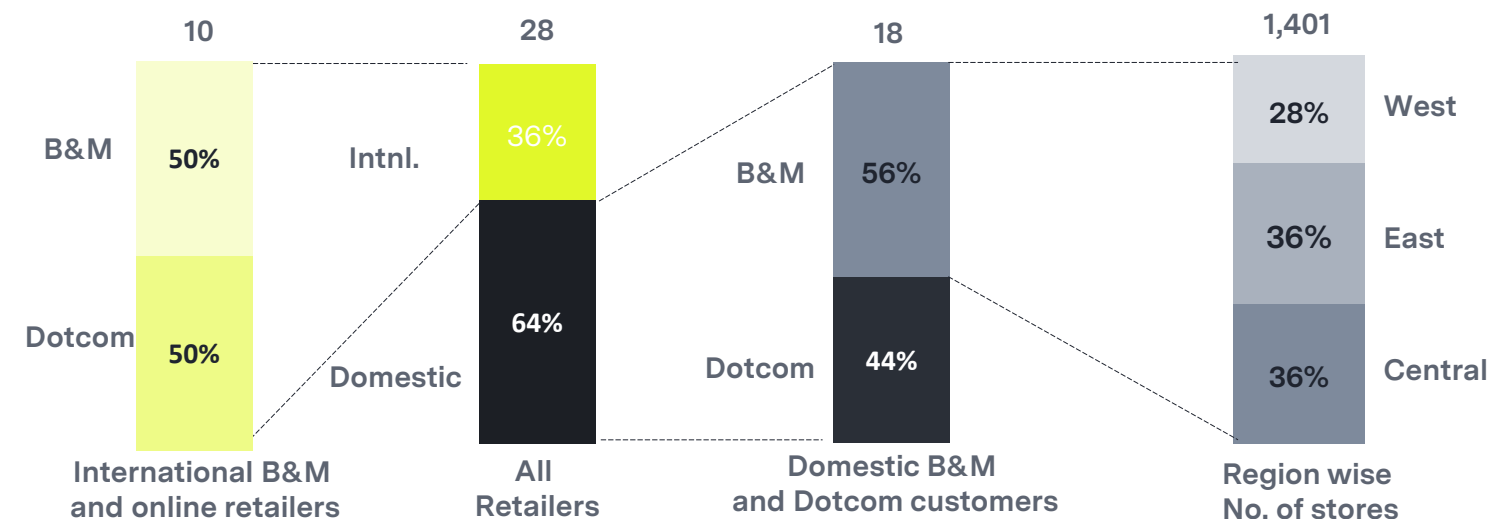


## Expense tracking

- Expense report at department level and at consolidated level to help track sales, costs & profitability
- Setting up a monthly cost aggregation process to help plan & control costs at department level

# Performance trackers - Retail sales & expenses

SKU level performance & shipments across of 18 domestic and 10 international retailers...



... by generating ~90 types of reports at various frequencies, leading to over 1.6k reports published during the year

