

# BI Infrastructure set-up

## Industrial Parts Manufacturing Company

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

# 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 and balanced scorecards 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. Also developed balanced scorecards to help executives monitor the key performance indicators across customer, product, personnel, operations and finance categories.
- 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 helped in measuring the key performance indicators compared against set targets and aided in strategizing decision making for the executives

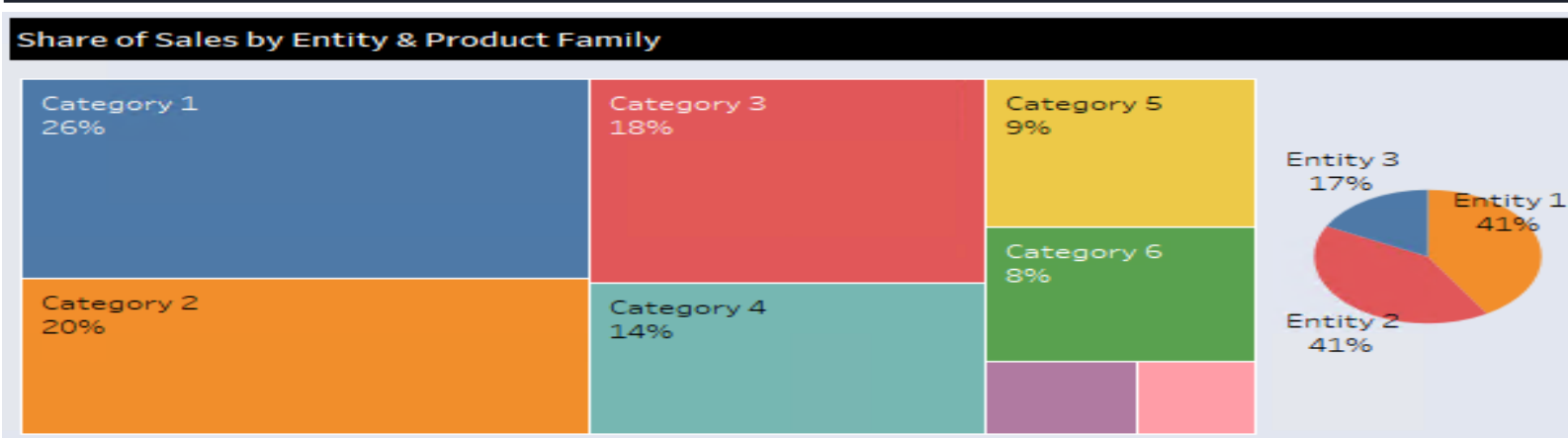
# Balanced scorecards reporting the key metrics of business performance

| Balanced Score Card |                             |  |        |  |   | Glossary |       |  |   |  |        |  |
|---------------------|-----------------------------|--|--------|--|---|----------|-------|--|---|--|--------|--|
| Customer            | Net Promoter Score          |  | 73     |  | Order to sales (Book to bill) LTM         |          | 1.12  |  | No. of RMAs, YTD                                    |  | 3,173  |  |
|                     | 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 YoY          |          | 13.2% |  | Bundled sales as % of all orders, LTM               |  | 63.3%  |  |
|                     | Prior year                  |  | 93.7%  |  | Prior Year                                |          | 8.6%  |  | Prior LTM   |  | 58.2%  |  |
|                     | Target                      |  | 100.0% |  | Target                                    |          | 10.0% |  | Target  |  | 75.0%  |  |
|                     |                             |  |        |  |   |          |       |  |   |  |        |  |
| People              | Employee Satisfaction Score |  | 3.0    |  | Recordable workplace safety incidents YTD |          | 24    |  | Employee turnover                                   |  | 15.6%  |  |
|                     | Prior year                  |  | 2.8    |  | Prior month YTD                           |          | 21    |  | Prior Year  |  | 18.3%  |  |
|                     | Target                      |  | 2.5    |  | Target                                    |          | 0     |  | Target  |  | 7.0%   |  |
|                     |                             |  |        |  |   |          |       |  |   |  |        |  |
| Operations          | On-time delivery, YTD       |  | 82.3%  |  | Gross Margin Rate Improvement, YTD        |          | 1.1%  |  | 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 % YoY       |  | 13.2%  |  | EBITDA Percentage Growth, YTD             |          | 13.8% |  | Working Capital as a % of Sales, YTD                |  | 32.70% |  |
|                     | Prior Year                  |  | 8.6%   |  | Prior Year                                |          | 11.4% |  | Prior Year  |  | 30.20% |  |
|                     | Target                      |  | 10.0%  |  | Budget                                    |          | 9.2%  |  | Target  |  | 24.00% |  |
|                     |                             |  |        |  |   |          |       |  |   |  |        |  |

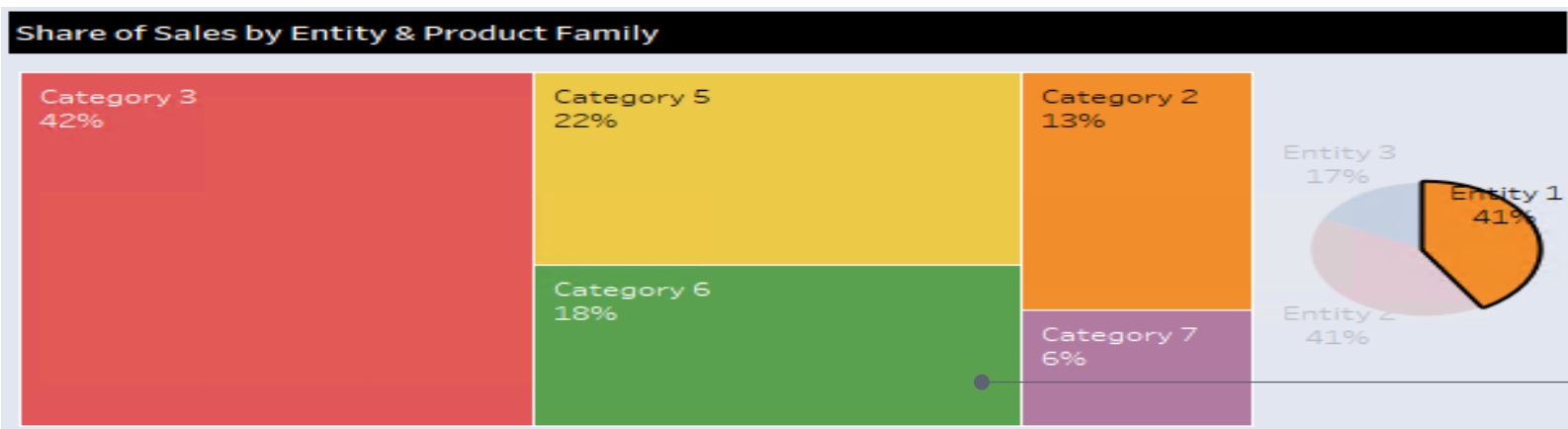
Grid view of key performance indicators along with prior year values and targets specified for quick comparison

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

Before a selection



After a selection

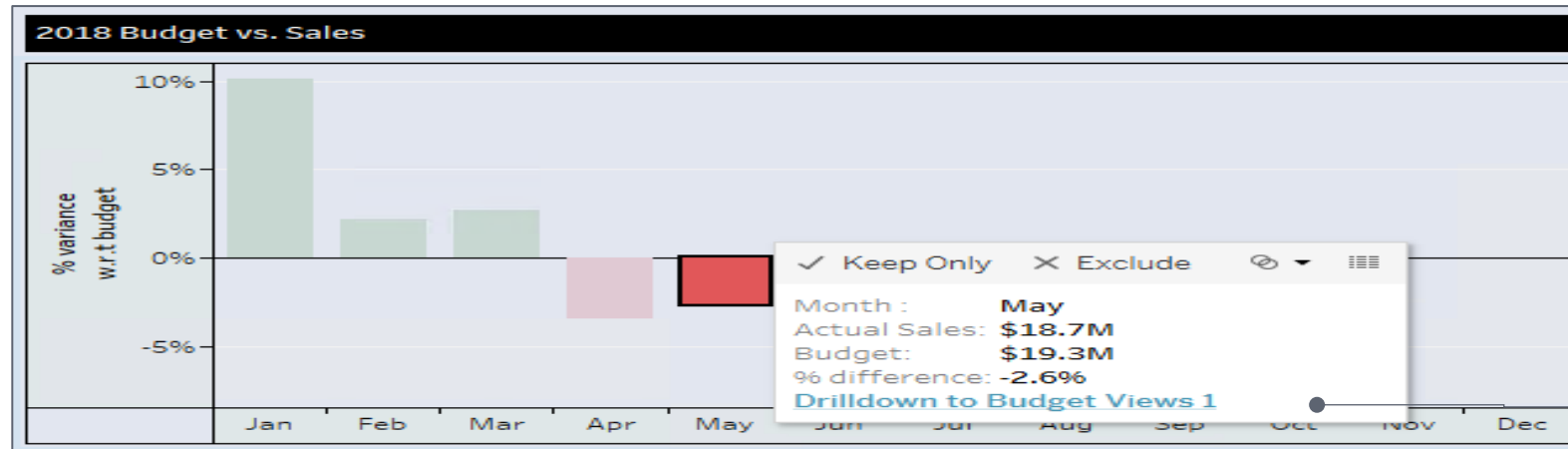


Selection on a pie chart that automatically updates the adjacent chart

Updated chart based on the selection in adjacent chart

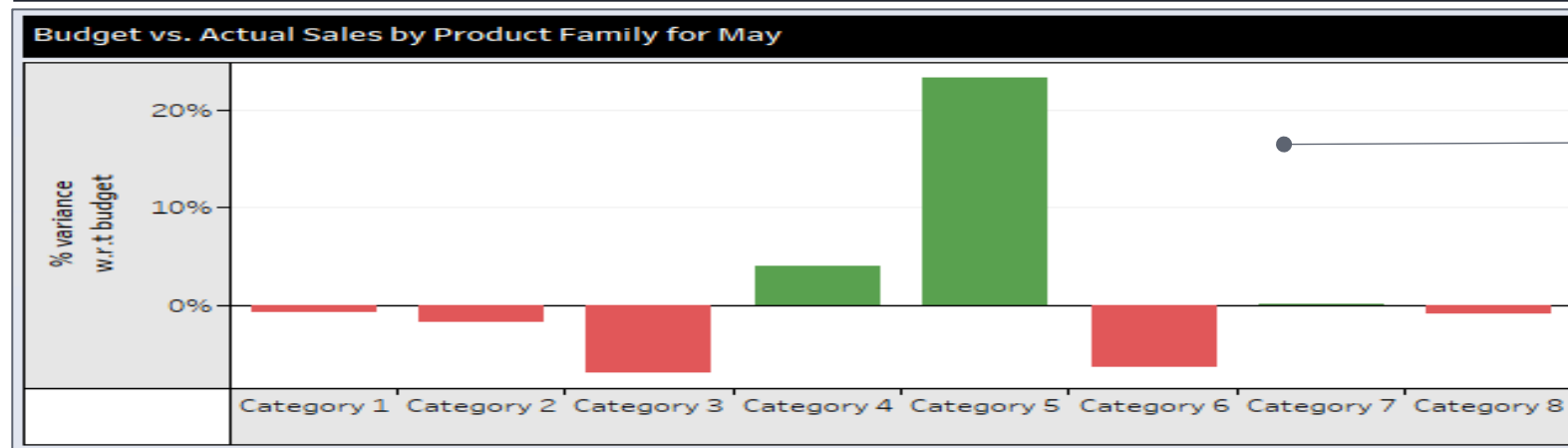
# Flexibility to drill down and investigate the drivers of performance helps identify areas that need attention

Top-down view



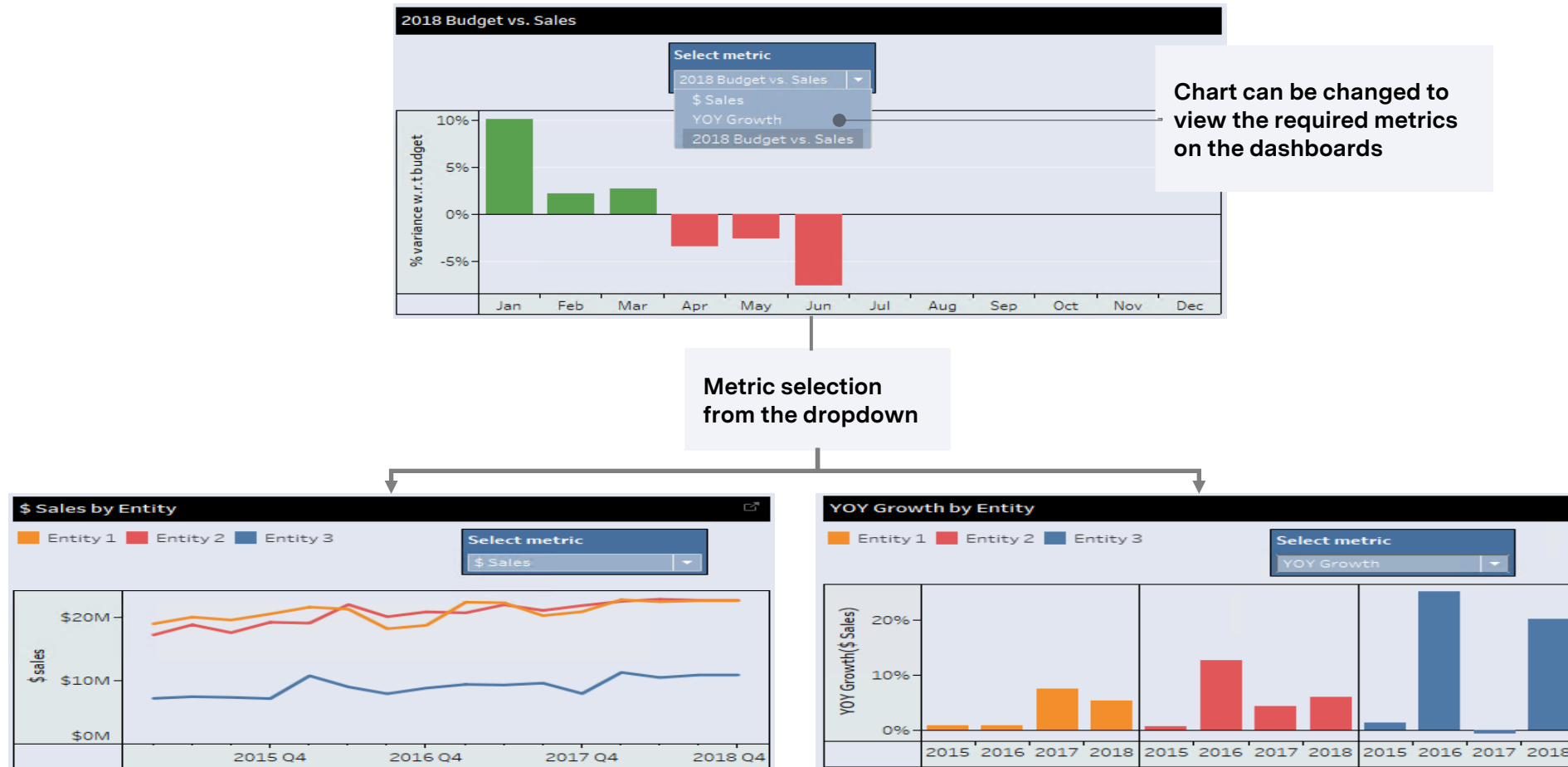
User can select the view to drill-down for understanding the variance for a particular month

Drill-down view



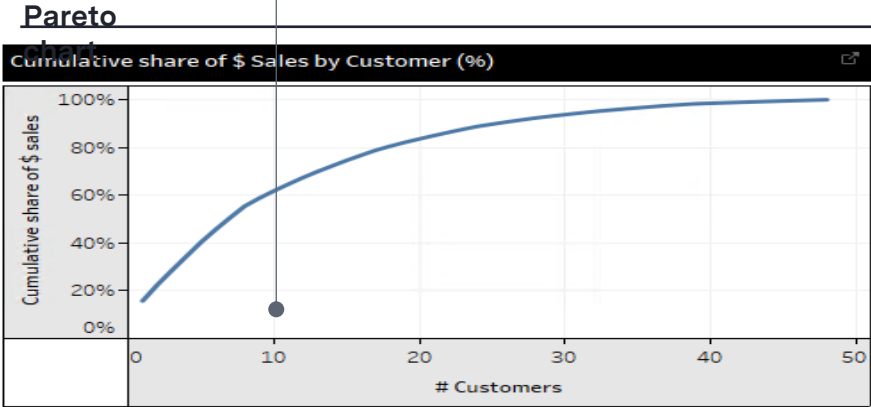
The drill-down view provides directional guidance regarding the category that led to the variance in the selected month

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



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

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



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

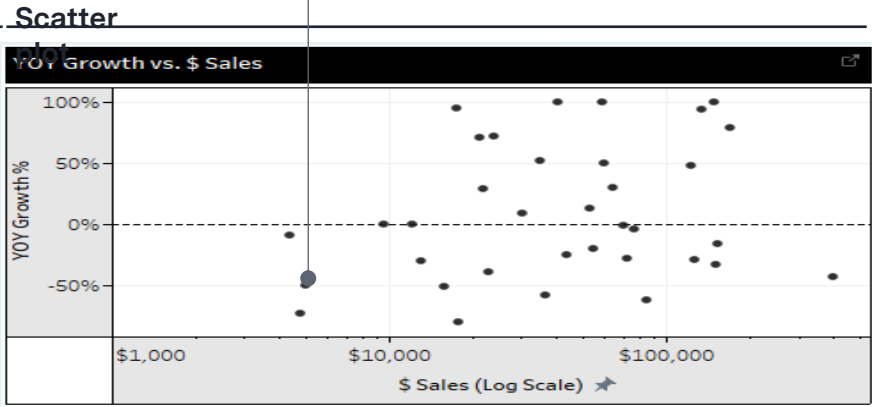


Table chart with search

**Option**

Name Search

(All)

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

