

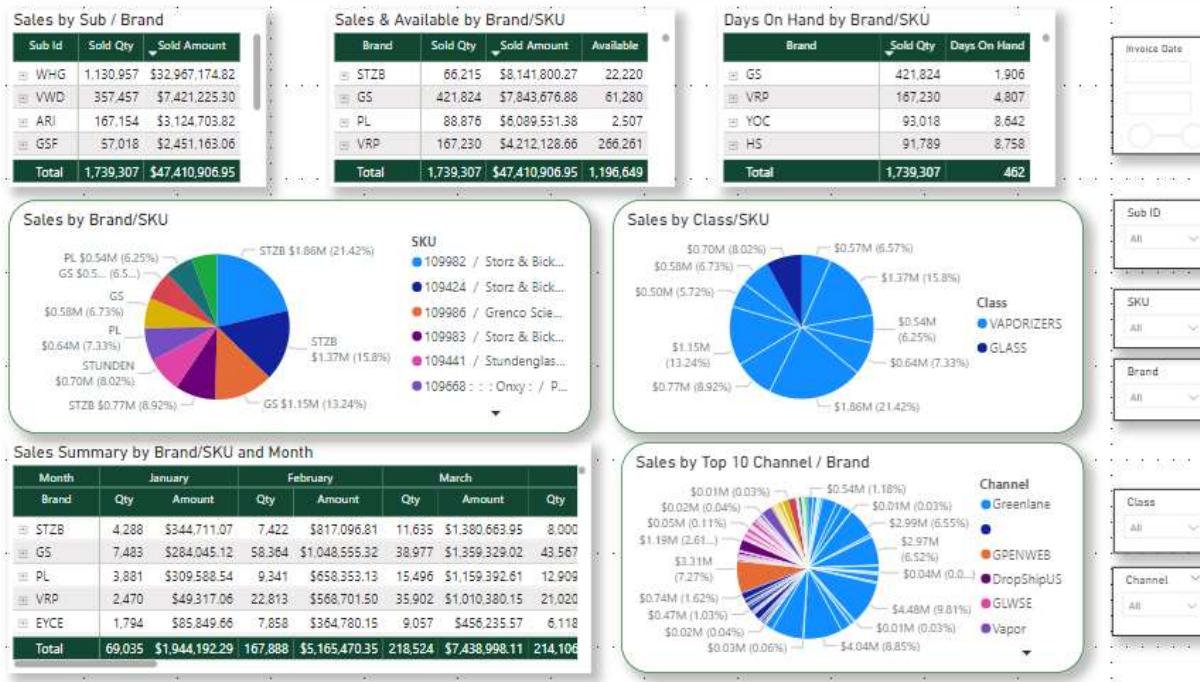
All Data Models and Visualizations designed and developed by Jose Molares**Samples**

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Consumer Goods B2B and B2C

Sales & Inventory Analysis



Year and current Sales Budget Track



Products Groups and Sales Reps Track

InvoiceDate: 7/1/2022

E&O SKU	Employee Name	Employee Responsi...	InvoiceNumber	Subsidi...
All	All	All	All	All

Invoices: Summary by Sales Responsible

Employee Responsible	Amount	Quantity	E&O Profit	Cou...
Bradley Macdonald	\$80,588.56	7,664	30,117.91	Intl
Andy Hayes	\$27,189.18	2,351	17,021.70	US
Alyson Alexander	\$37,016.09	5,918	15,888.02	US
Chad Freling	\$26,463.02	1,131	14,892.03	US
Dani Mora	\$20,723.14	1,684	12,726.02	US
Total	\$317,892.11	28,601	158,828.22	

Invoices: Summary by E&O SKU

E&O SKU	Variant Number	Amount	Inv. Qty	E&O Profit	Prod...
109728	WHG-005617	\$23,690.84	1,547	9,508.53	Yocan
109309	WHG-004820	\$12,654.94	309	7,302.25	Mariju
109527	WHG-005773	\$11,724.95	850	7,664.75	Boun
109770	WHG-005773	\$8,922.45	936	6,369.00	Aeros
109320	WHG-005773	\$8,326.14	849	6,254.00	Aeros
Total		\$317,892.11	28,601	158,828.22	

Invoices Detail

Sub Id	Country	Area	E&O SKU	InvoiceDate	InvoiceNumber	Employee Responsible Name	Employee Name	Inv. Amount	Inv. Qty	Unit Price	Floor Price	E&O Profit	Prod...
WHG	US	Channel & Dropship	109509	11/23/2022	INV000101829	Chad Freling	Chad Freling	\$67.00	1	\$67.00	0.00	67.00	10950
WHG	US	B2B	109896	11/23/2022	INV000101933	Genna Fisher	Genna Fisher	\$70.00	5	\$14.00	8.96	25.20	10989
WHG	US	B2B	108316	11/23/2022	INV000101713	Dani Mora	Dani Mora	\$7.65	1	\$9.00	3.00	6.00	10831
WHG	US	B2B	109872	11/23/2022	INV000101678	Genna Fisher	Genna Fisher	\$80.00	2	\$40.00	12.00	56.00	10987
WHG	Intl	LatAm	109006	11/23/2022	INV000101676	Guillermo Soto Marquez	Guillermo Soto Marquez	\$15.00	1	\$15.00	4.00	11.00	10900
WHG	US	B2B	109006	11/23/2022	INV000101683	Alyson Alexander	Alyson Alexander	\$85.74	6	\$14.29	4.00	61.74	10900
WHG	Intl	LatAm	109309	11/23/2022	INV000101676	Guillermo Soto Marquez	Guillermo Soto Marquez	\$180.00	4	\$45.00	17.41	110.36	10930
WHG	US	B2B	109309	11/23/2022	INV000101678	Genna Fisher	Genna Fisher	\$45.00	1	\$45.00	17.41	27.59	10930
WHG	Intl	LatAm	110254	11/23/2022	INV000101676	Guillermo Soto Marquez	Guillermo Soto Marquez	\$78.00	2	\$39.00	0.00	78.00	11025
Total								\$317,892.11	28,601			158,828.22	

Annual Sales Track by Brands, Item Groups, Items, Companies

InvoiceDate: 4/30/2021 - 11/24/2022

Subsidiary	Brand	Class	Area	InvoiceNumber	ProductNumber
All	All	All	All	All	All

Brand / Item

	January	February	March	April	May	June	July	August	September	October	November	Dec	
14R						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
420C	\$105.00		\$3,194.00			\$50.00		\$420.00		\$75.00		\$660.00	
SDS	\$304.05	\$10.33	\$80.30	(\$20.39)	\$227.68	\$44.41	\$0.00						
7PL					\$60.00								
Total	\$21,102.16	\$1,943,990.15	\$5,179,766.15	\$7,473,265.66	\$7,003,747.28	\$5,097,771.99	\$7,390,936.27	\$1,716,277.76	\$4,026,801.78	\$2,323,783.46	\$2,900,489.73	\$2,035,948.46	\$538

Class / Brand

	January	February	March	April	May	June	July	August	September	October	November	Dec	
ACC	\$418.40	\$32,617.24	\$114,667.05	\$94,766.12	\$109,707.41	\$83,008.04	\$81,778.03	\$54,834.37	\$84,371.13	\$39,980.65	\$31,146.39	\$28,257.13	\$10.
14R							\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
420C	\$105.00		\$3,194.00			\$50.00		\$420.00		\$75.00		\$660.00	
AW	\$503.46	\$1,085.46	\$7,352.65	(\$71.97)		\$1,750.50	\$905.40	\$83.48	\$632.70		\$19.28		
Total	\$21,102.16	\$1,943,990.15	\$5,179,766.15	\$7,473,265.66	\$7,003,747.28	\$5,097,771.99	\$7,390,936.27	\$1,716,277.76	\$4,026,801.78	\$2,323,783.46	\$2,900,489.73	\$2,035,948.46	\$538

Sub Id / Brand

	January	February	March	April	May	June	July	August	September	October	November	Dec	
AKI	\$374,405.88	\$326,000.88	\$220,292.44	\$293,527.87	\$314,736.98	\$232,151.70	\$207,680.31	\$251,870.09	\$220,758.90	\$548,270.40	\$97,211.48	\$3	
GSF	\$104,849.55	\$348,997.34	\$353,339.65	\$438,178.86	\$296,419.93	\$286,394.03	\$322,446.30	\$158,809.50	\$138,539.33	\$3,398.47		(\$209.90)	
HSCM			\$876.46	\$49,663.89	\$35,945.89	\$47,666.12	\$66,437.98	\$41,215.73	\$39,923.25	\$14,323.90	\$31,113.73	\$26,314.21	
HSMV			\$11,123.62	\$10,504.23	\$10,457.79	\$11,379.38	\$5,099.70	\$10,879.47					
SHVLT		\$129,475.78	\$107,704.19	\$106,582.26	\$123,813.63	\$147,576.76	\$129,928.41	\$87,752.21	\$131,515.13	\$75,436.36	(\$7,421.05)	\$137,734.71	
Total	\$21,102.16	\$1,943,990.15	\$5,179,766.15	\$7,473,265.66	\$7,003,747.28	\$5,097,771.99	\$7,390,936.27	\$1,716,277.76	\$4,026,801.78	\$2,323,783.46	\$2,900,489.73	\$2,035,948.46	\$538

Pocket margin (Cost to Serve) & Benchmarking Analysis

Client or Site Benchmarking

Profitability & Benchmark

business performance.
It's about people

\$174,315 Ingresos \$155,800 Costo de Servir 11% Margen 2,175 Volumen 9 Clientes

Dynamic Segments

Estrato	Clientes	Facturado	Margen	Margen %	Volumen	% Total Volumen
Estratégicos	2	\$14,950	\$1,150	8%	230	11%
Margin < 0	1	\$19,000	(\$750)	-4%	250	11%
Margin < 10%	3	\$87,155	\$6,705	7%	1,055	49%
Margin < 25%	2	\$38,960	\$7,860	19%	490	23%
Margin > 25%	1	\$14,250	\$3,750	26%	150	7%
Resumen	9	\$174,315	\$18,515	11%	2,175	100%

Profitability Ranking

Cliente	Volumen	% Total Volumen	Unit Margin	Facturado	% Total Facturado	Margen	Margen %	% Margen Total
C5	150	7%	26%	\$14,250	8%	\$3,750	26%	20%
C7	120	6%	18%	\$10,200	6%	\$1,800	18%	10%
C8	370	17%	11%	\$28,760	16%	\$5,860	20%	32%
C3	355	16%	8%	\$31,055	18%	\$2,605	8%	14%
C4	230	11%	8%	\$14,950	9%	\$1,150	8%	6%
C2	450	21%	5%	\$39,350	23%	\$3,600	9%	19%
C6	250	11%	3%	\$16,750	10%	\$500	3%	3%
C1	250	11%	-4%	\$19,000	11%	(\$750)	-4%	-4%
Total	2,175	100%	8%	\$174,315	100%	\$18,515	11%	100%

Region: All **Segmento**: All

Pocket Margin

Precio Base Descuento Piete Facturado Piete Pagado Costo Produccion Otros Costos Pocket Margin

Pocket margin waterfall

2,175 Volumen **\$174,315 Facturado** **11% Margen%**

Pocket Margin por Unidad

Cliente	Volumen	Precio Base	Descuento	Piete Facturado	Precio Neto	Costo Financ	Pocket Price	Piete Pagado	Costo Produccion	Otros Costos	Total Costo	Pocket Margin	Pocket Margin %
C1	100	\$100	\$15	\$0	\$85	\$5	\$80	\$5	\$70	\$5	\$80	\$0	0%
C2	50	\$100	\$28	\$15	\$87	\$67	\$25	\$70	\$95	(\$8)	(\$8)	-9%	
C3	120	\$100	\$12	\$20	\$108	\$10	\$98	\$20	\$70	\$90	\$8	7%	
C3	235	\$80	\$3	\$0	\$77	\$77	\$5	\$65	\$70	\$7	\$7	9%	
C6	250	\$80	\$15	\$2	\$67	\$57	\$0	\$65	\$65	\$2	\$65	3%	
C8	70	\$80	\$12	\$0	\$68	\$68	\$5	\$65	\$70	(\$2)	(\$2)	-3%	
C1	150	\$90	\$25	\$5	\$70	\$70	\$5	\$60	\$10	\$75	(\$5)	-7%	
C2	200	\$88	\$10	\$10	\$88	\$88	\$18	\$80	\$78	\$10	\$10	11%	
C5	150	\$90	\$5	\$10	\$95	\$95	\$10	\$60	\$70	\$25	\$25	26%	
C7	120	\$90	\$30	\$25	\$85	\$85	\$10	\$60	\$70	\$15	\$15	18%	
C8	300	\$90	\$15	\$5	\$80	\$80	\$0	\$80	\$60	\$20	\$20	25%	
Media	220	\$88	\$15	\$9	\$82	\$15	\$81	\$10	\$63	\$15	\$74	\$7	8%

Region: All **Segmento**: All **Cliente**: All **Producto**: All **Mes**: All

Contribución Margen por Cliente

Volumen por Región y Segmento

Fact. por Producto y Fecha

Facturado y Margen por Mes

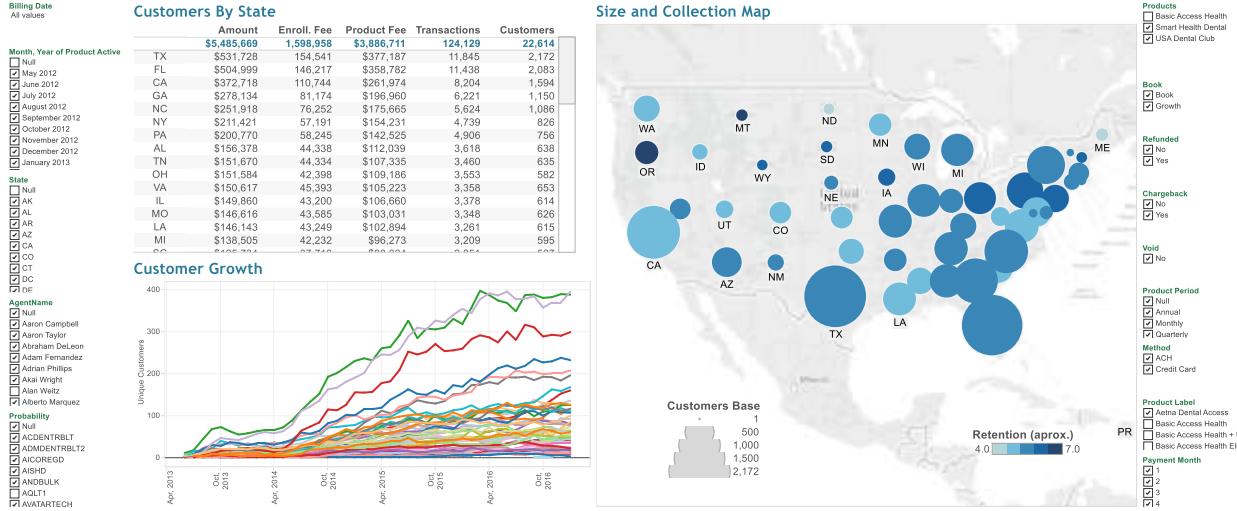
Telemarketing Business

Telemarketing Agents promote Health monthly subscription Products, out of Potential Customers Lead Vendors, across all USA. Data is gathered from at least 8 different systems or Databases.

Customers Earnings and Retention across USA States

Several dimensions available to filter: Subscription Sales Dates, recurring Billing Months, Sales Agents, Lead Source, Products.

Geo Distribution (click any row of point to zoom into other charts)



Customers Earnings per Time, Product, Agent, Vendor

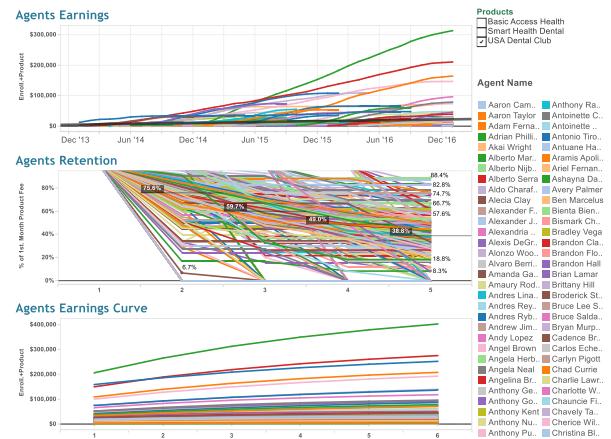
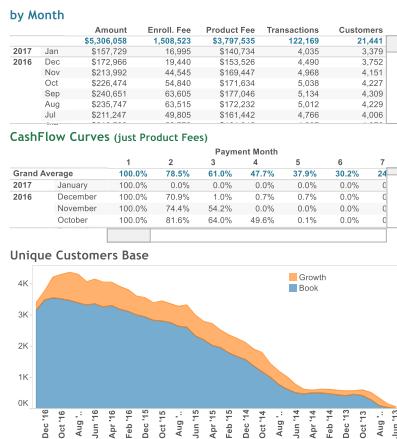
Selection in any panel filters all the others

Transactions Summary (click any row of any report to zoom into the others)



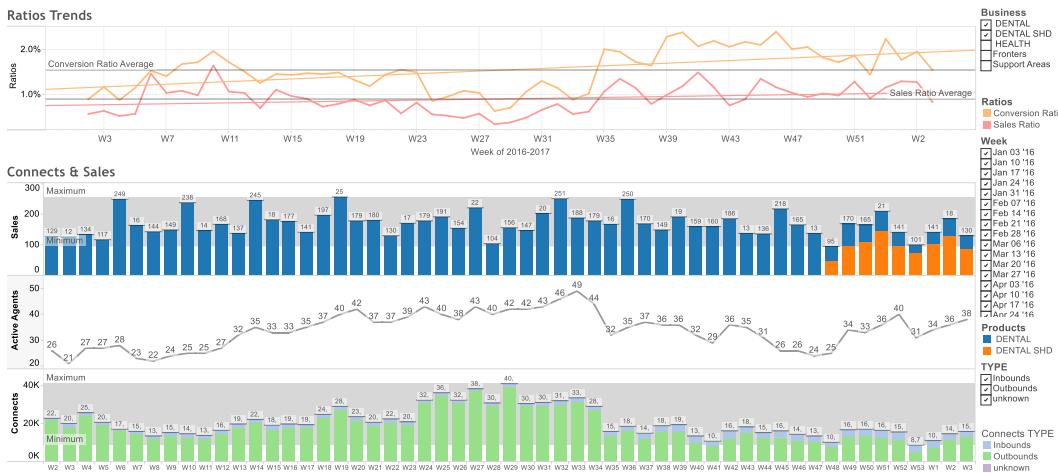
Agents Earnings Performance

A closer look to Customer Attrition and Agents Performance in time



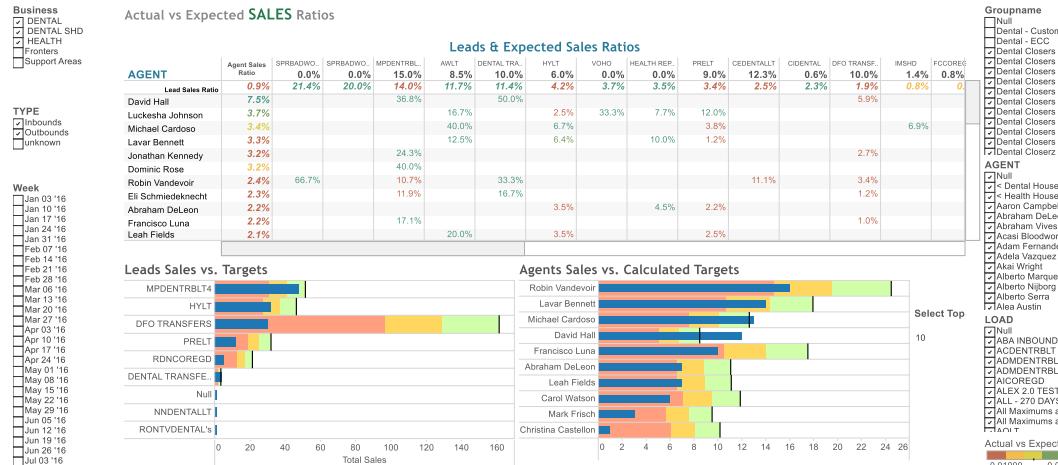
Sales

Main Sales Performance Metrics along time: Source Leads, Agents and Conversions



Agents & Products: Goals Achievement Scorecards

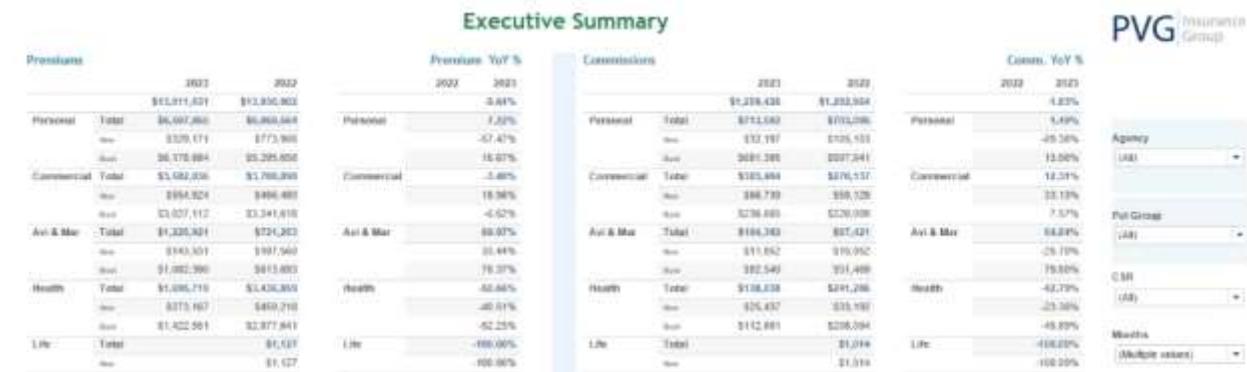
Combines Agents and Leads, Sales and Targets



Insurance (Service Contracts) Business

Sales of Insurance Policies (or any Service Contracts Business) of several Types and Carriers and their Trends along Time

Executive Sales Summary

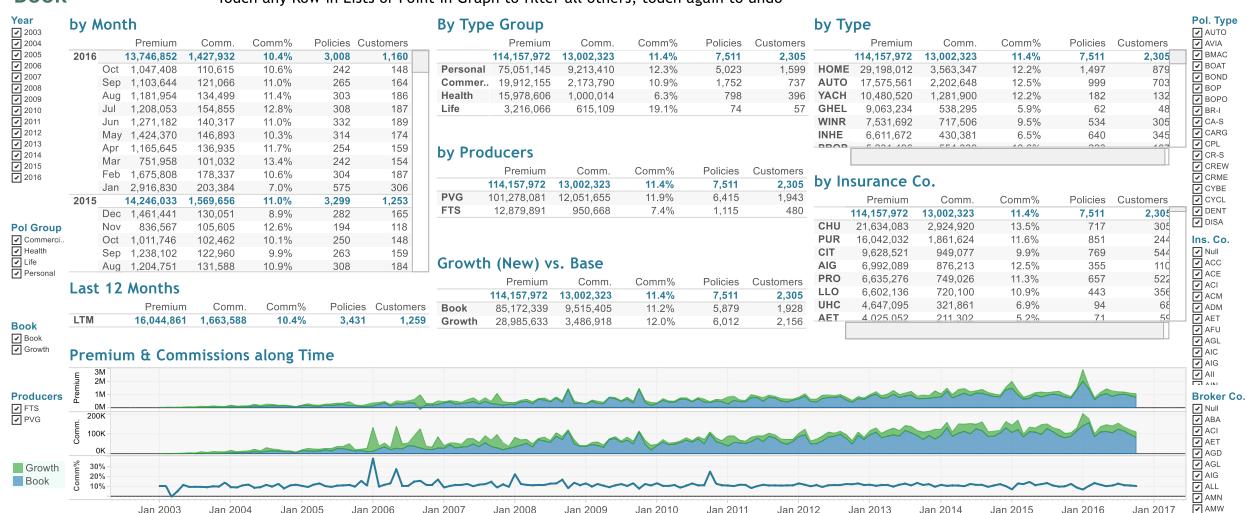


Sales

Actionable Touch and Zoom Panels by any dimension.

Book

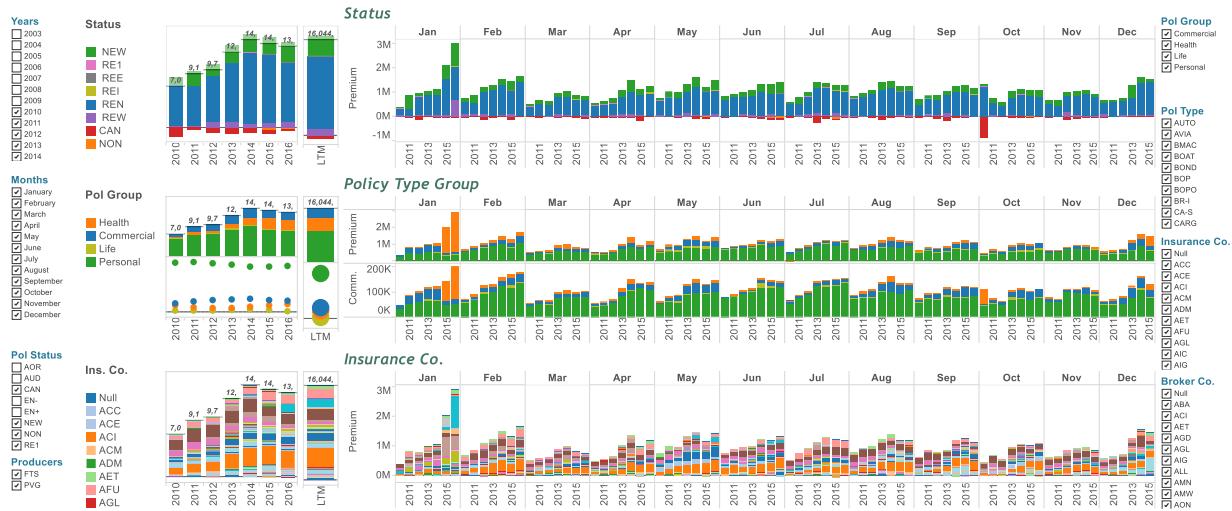
Touch any Row in Lists or Point in Graph to filter all others; touch again to undo



History & Projections

Actionable Touch and Zoom Graph by any dimension.

Graph Distributions



Digital Marketing

Google / Adobe Analytics

Sourced straight from Google or Adobe Analytics, and other sources.

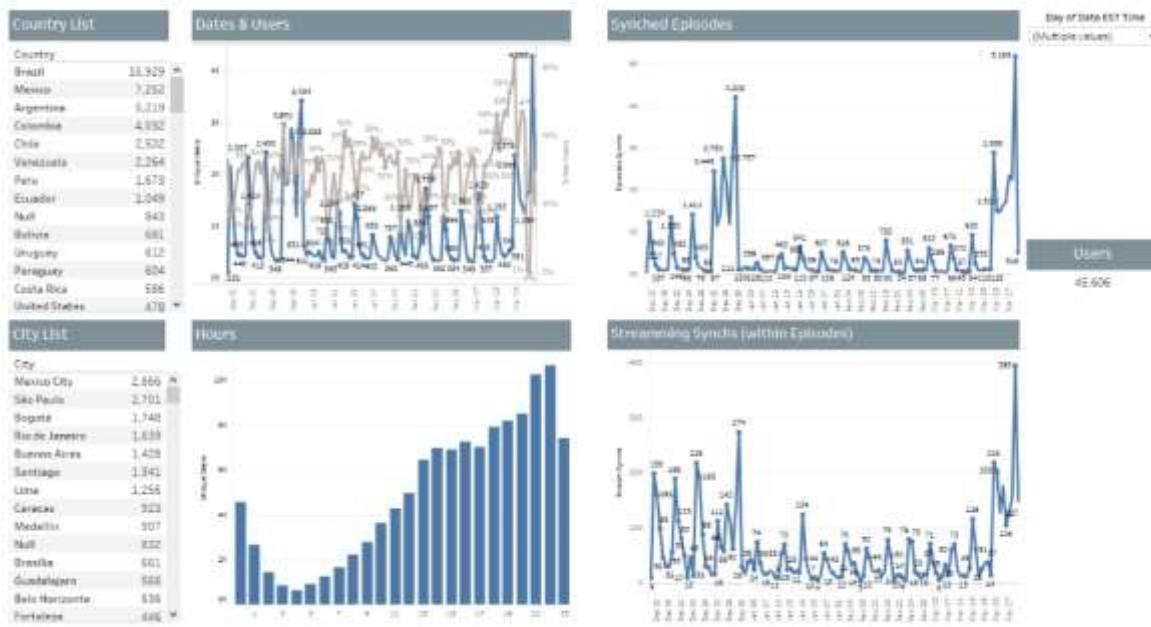


Entertainment Business

A Top-Tier High End player developed a Second Screen App to be used synchronized to Top Series. These Dashboards samples are part of monitoring and evaluating results.

Overall Users and Consumption

Demographics, Users per days and hours, App synchronized (sessions)



Synchronized Episodes & 2nd. Screen Consumption

All panels filter the others, showing Series, Contents and Languages Rankings



Synchronized Episodes Ranked per Countries, Days and Hours

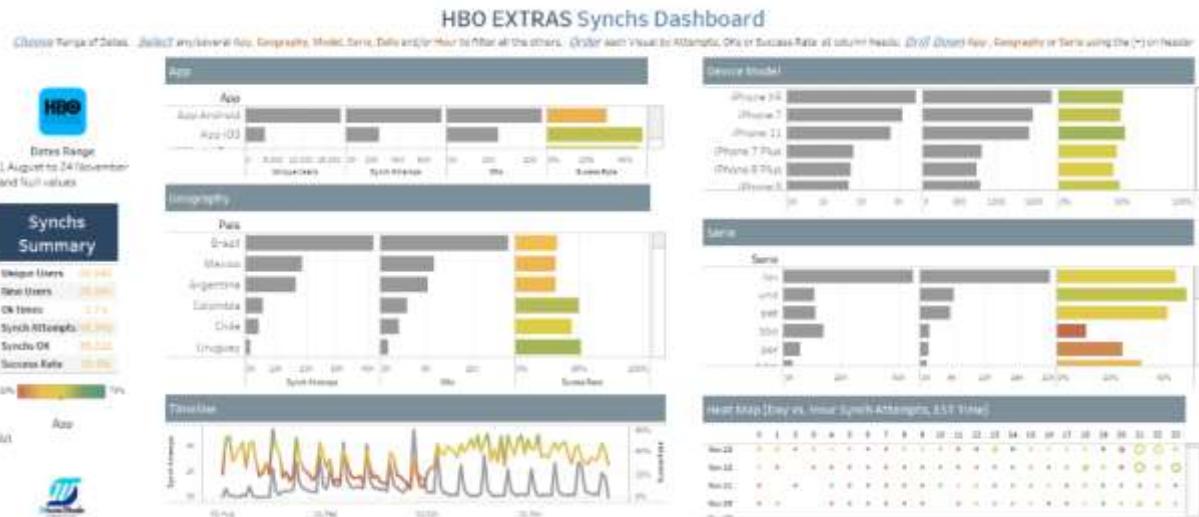
Color Highlighted Usage

Syncd Episodes by Country								Syncd Episodes by Day								Day of Sync EST Time (Multiple values)
	Total	Mar 29	Mar 28	Mar 27	Mar 26	Mar 25	Mar 24	Mar	Total	Mar 29	Mar 28	Mar 27	Mar 26	Mar 25	Mar 24	Mar
Total	59,774	5,139	2,241	2,396	1,718	1,635	1,467	Mar	59,774	5,139	2,241	2,396	1,718	1,635	1,467	Mar
Brazil	20,504	1,948	934	676	494	418	389	GOT	36,009	3,871	2,042	2,185	1,569	1,474	1,294	3,208
Mexico	7,805	462	206	245	383	182	245	TOL	8,113	104	32	25	29	34	38	18
Argentina	6,660	636	308	245	389	168	202	WAT	2,007	93	32	28	25	23	21	20
Colombia	4,634	635	211	276	200	224	342	WES	1,050	1,246	47	34	27	63	64	167
Venezuela	3,889	389	168	171	139	168	80	EUP	3,115	76	25	38	24	23	12	18
Chile	3,351	364	190	231	152	180	179	CHE	763	23	14	10	3	3	7	10
Peru	3,167	296	153	193	111	99	126	WIL	639	96	29	29	21	29	29	18
Bolivia	1,127	166	111	133	72	92	68	SLU	415	33	4	7	6	7	4	
Ecuador	1,049	119	68	46	42	39	46	TNL	147	55	15	15	7	1	8	
Panama	884	90	41	44	32	9	10									
Paraguay	677	34	13	15	16	5	18									
Guatemala	868	54	40	63	26	13	12									

Syncd Episodes by Day and Selected Hours													Selected Hours (Multiple values)												
	Total	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1	
Grand Total	11,714	306	254	524	76	64	215	15	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	
WAT S1 E01	3,488																								
WAT S1 E09	1,406																								
WAT S1 E09	1,225																								
WES S5 E01	1,029	3	7	14		21	11																		
WES S3 E03	887	42	88	723																					
TO_ S1 E09	990																								
TO_ S1 E09	929																								
WES S3 E02	784	2	5	13	35	27	7	1																	
GOT S8 E06	783																								
TO_ S1 E09	745																								
TO_ S1 E04	745																								

App Synchronization Quality

All relevant dimensions to find out service health, speed, and Customers preferences.
All panels filter the others. App (Drill to OS and Version), Device, Country (drill to City), Serie (drill to Episode), Day, Hour along the day. Color coded App recognition response quality



Customer Content Adoption and Preferences

Actual Customer consumption of Series and 2nd. Screen contents.

Series, Seasons, Episodes, Categorized Contents, Languages and Timecodes (specific moment along the Episodes). All panels filter the others.



Industry Specific Metrics

Metrics and Trends, even Customers support interactions.

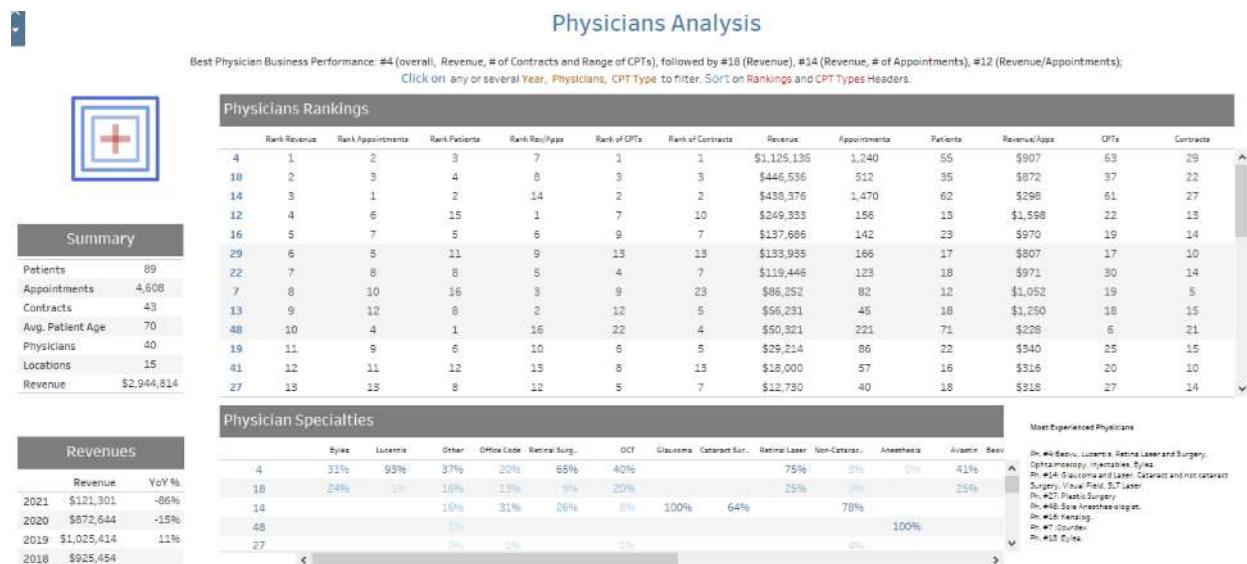


Medical Appointments Business

Executive Summary



Physicians Rankings



Contracts Analysis



Executive Storytelling



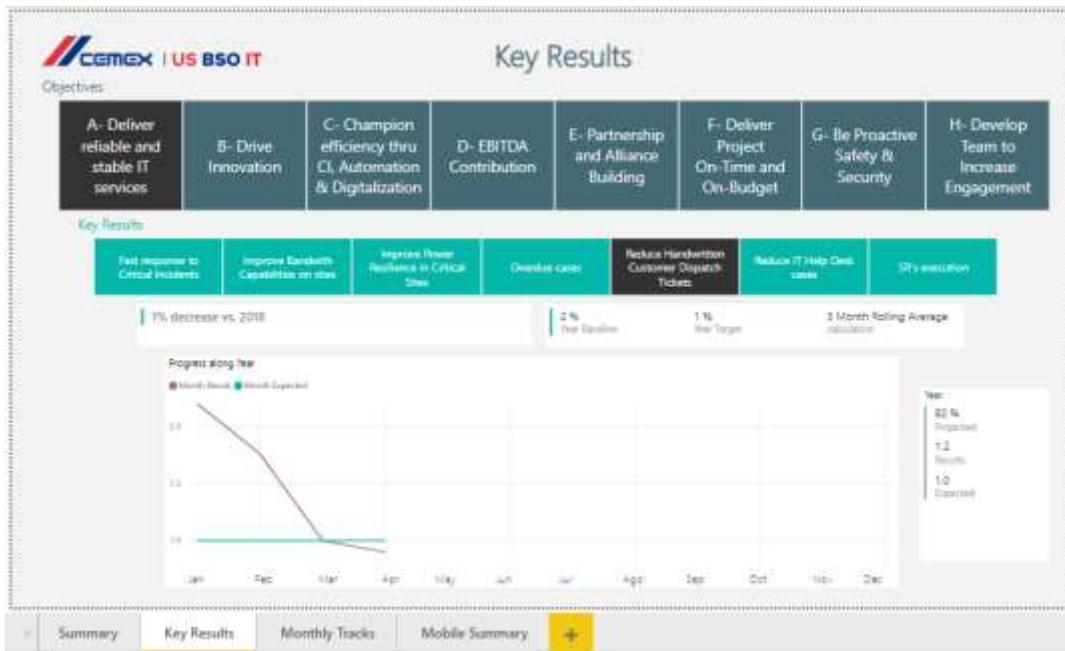
Objectives & Results Management

Executive Objectives and Key Results (OKRs) Dashboards to track advance and accomplishments of Annually set Objectives.

Objective Summary Dashboards



Key Results Dashboards



Sources information from Company's Objectives definitions and Structure (in SQL) and a summary Standardized Results file (Excel) populated from diverse sources.

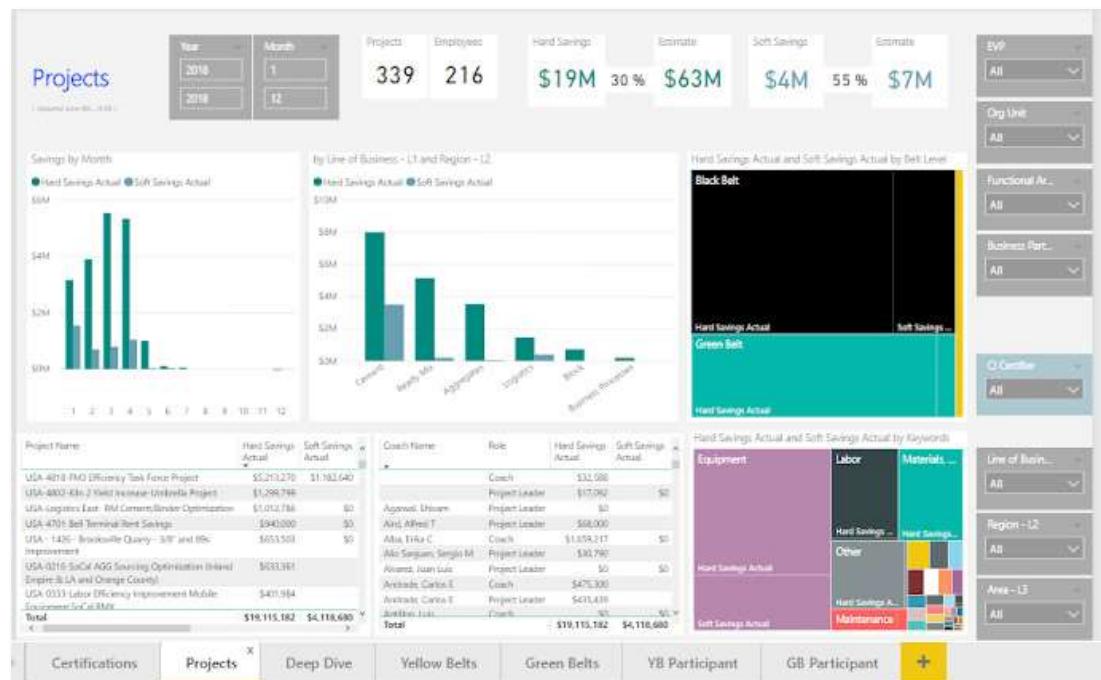
Human Resources

Executive and Self-Service Dashboards to track advance of nationwide employees along their Continuous Improvement program. Sources information from HR (SF SAP), Projects (Qystone), e-Learning (SABA), in-place trainings, assessments, and Certifications (Sharepoint Lists, excel, SQL files)

Operational excellence certifications Dashboards



Track of Improvement Projects and participants

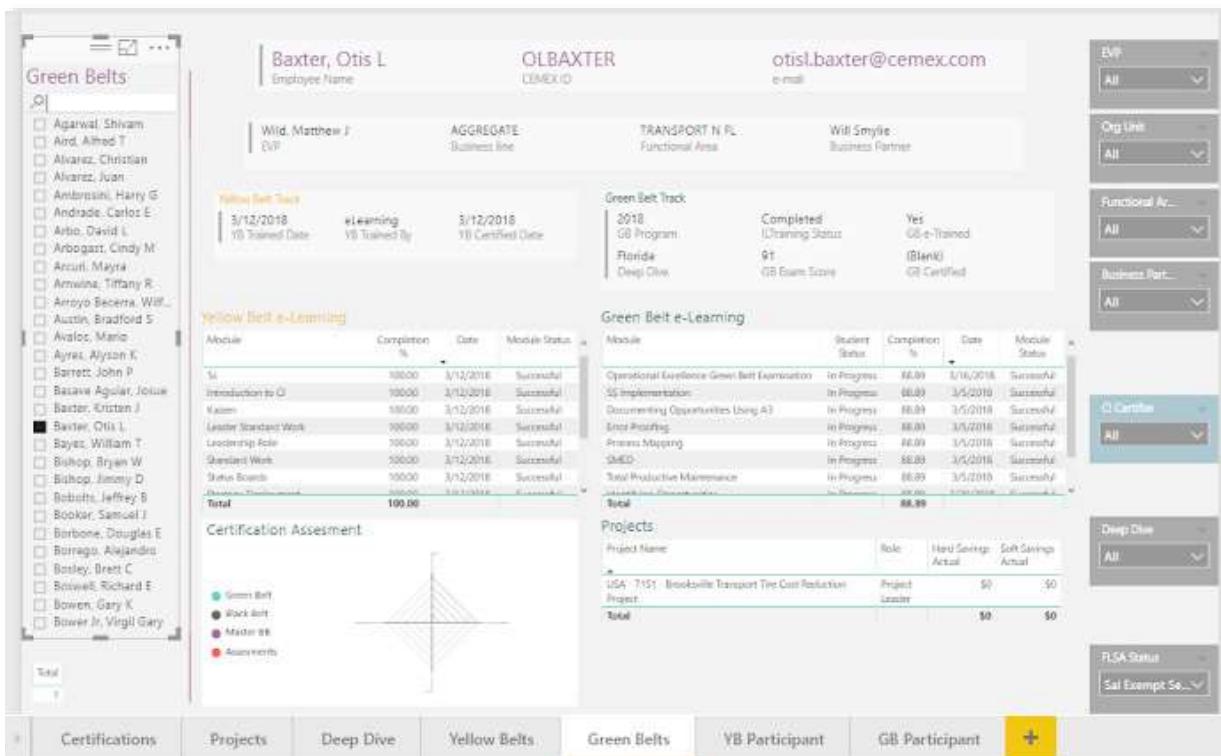


Sets of Dashboards to serve several audiences: Executives, Team Leaders, HR and participants
Self-Track. Row Level Security and conditioned Access through an internal portal.

Yellow and Green Belts track per Deep-Dive sessions



Team Leader views



Basic Commercial Dashboards

Sales of Products / Contracts of several Types and Vendors, and their Trends along Time

Earnings

Distribution per Lines of Business, Contribution per New/Book sales/contracts

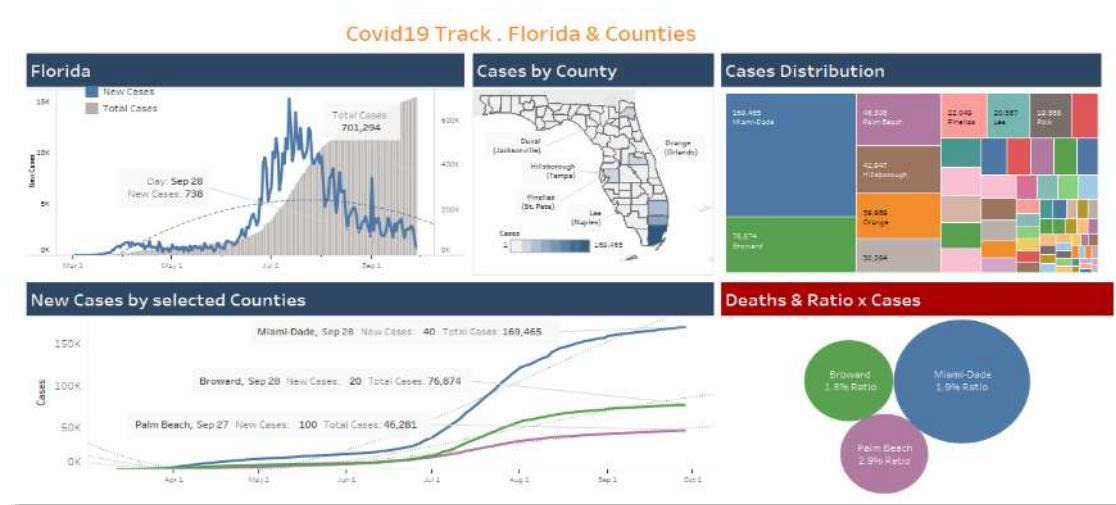
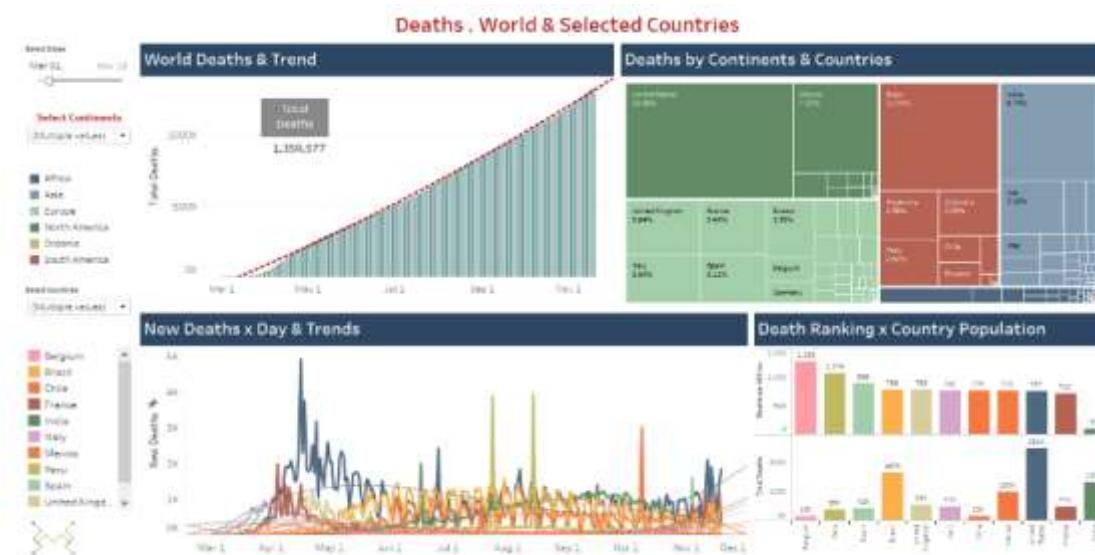


Profits



COVID Data Visualizations

Raw input data from public open sources.



Mobile versions

