

REPORT ON MANAGEMENT REQUEST: TRACKING KEY PERFORMANCE METRICS

Task 1: Tracking OTIF Metrics

Objective:

The Director wants to monitor the **On Time (OT)**, **In Full (IF)**, and **OTIF (On Time In Full)** metrics for orders with the following details:

- **Director's Requirements:**
 - Track metrics daily, by city, and by customer.
 - Compare these metrics against the set targets.
- **Additional Requirements from the Head of Analysis:**
 - Add two more metrics:
 - **Line Fill Rate (LIFR):** The rate of items delivered in full by line.
 - **Volume Fill Rate (VOFR):** The rate of items delivered in full by volume.

Implementation Steps:

1. Data Collection

Collect daily delivery data, including:

- Order ID
- Customer ID
- Customer Name
- City
- Product ID
- Product Name
- Order Placement Date
- Order Quantity
- Agreed Delivery Date
- Actual Delivery Date
- Delivered Quantity

2. Metric Calculation

Calculate OT%, IF%, OTIF%, LIFR%, and VOFR% to monitor delivery performance.

3. Target Comparison

Compare each metric result with the set targets and flag any deviations.

Task 2: Visual Representation of Customer Service Levels

Objective:

Provide a visual representation of customer service metrics to help the Director easily track performance against targets.

- **Director's Requirements:**
 - Display customer service levels based on these metrics and compare them with targets.
- **Additional Requirements from the Head of Analysis:**
 - Display all metrics for each customer.
 - Use a matrix to show metrics with color formatting, for example:
 - **Green** for metrics above target.
 - **Red** for metrics below target.
 - Track OTIF performance against targets over different time frames:

- Daily, weekly, and monthly.
- Include an option to toggle metrics in the report, allowing users to switch and update charts based on the desired metric.

Implementation Steps:

1. **Data Aggregation**
Aggregate daily data by customer to calculate metrics.
 2. **Matrix Creation**
Create a matrix in Power BI to display metrics with conditional color formatting.
 3. **Visualization Setup**
Build a dashboard or chart with time filters (daily, weekly, monthly) and metric toggles.
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Task 3: Product Insights

Objective:

Provide more detailed insights into product performance based on LIFR and VOFR metrics.

- **Director's Requirements:**
 - Provide additional product performance information.
- **Additional Requirements from the Head of Analysis:**
 - Display only two metrics: LIFR and VOFR for each product.
 - Add sparklines to visually show distribution trends over time.

Implementation Steps:

1. **Data Filtering**
Filter data to focus on LIFR and VOFR for all products.
 2. **Metric Calculation**
Calculate LIFR and VOFR for each product.
 3. **Sparkline Integration**
Integrate sparklines in Power BI to show trends in LIFR and VOFR over time.
 4. **Visualization Setup**
Create a report or dashboard displaying LIFR and VOFR with sparklines, facilitating easy analysis of product performance trends.
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Conclusion

This report provides a comprehensive and visually intuitive system for tracking delivery and customer service performance. Organizing data and displaying metrics clearly will enable management to quickly identify issues and make timely strategic decisions.