Evans & Carter Sales application

EVANS & CARTER
SINCE 1986

Your role

You have been hired as business analysts by Evans & Carter Fashion. Your job is the following:

- Define user roles and user scenarios.
- Determine basic information needs based for each role and scenario
- Design a Decision Support System that meets the identified information needs

In order to be able to accomplish your goals you will need to form an understanding of relevant business rules and data. You will need to use the information provided to you, in the form of the Evans & Carter business plan as well as PMs from the leadership, to attain said understanding.

You will have access to business data from Evans & Carter that you will use to design the application. It is highly recommended that you take good care to usability and visual appeal when designing.

The Evans & Carter business plan

The Company

Evans & Carther is an international fashion company based in Lund, Sweden. The company is looking for a Decision Support-application to use when analyzing their sales data. Evans & Carter is a wholesaler of fine clothing, buying from a variety of manufacturers and selling to retail store outlets.

The company has five sales offices in four countries:

Lund, Sweden (Headquarters)

- Hong Kong, China
- Nice, France
- New York, USA
- Seattle, USA

Corporate headquarters in Lund has these departments:

Marketing

- Sales
- Finance
- IT
- Accounting
- Purchasing
- HR

The company has about 1,200 customers in 21 countries. Customers are a mix of small boutiques and large retail department stores.

Background

Evans & Carter is enjoying rapid growth in their business. The combination of good products, excellent service, and competitive prices have provided them a solid value proposition that customers eagerly embrace. As with any growing company, however, there are many challenges. Company leadership is focused on several important efforts to position them for a future of growth and prosperity.

One of those efforts is the implementation of state-of-the-art business systems. The IT Director has undertaken this challenge and has been replacing and improving the IT infrastructure over the last three quarters. One part of this effort includes addressing some weaknesses in their business reporting and analytics:

There is no single integrated BI system. Each business system provides some basic reporting. They are not integrated with one another in any meaningful way. This makes cross-system reporting difficult or impossible.

- Standard reports from existing systems are too limited. They only offer rudimentary reporting and no analysis. There are only limited possibilities to drill down and ask new questions due to pre-designed static reports and limited dimensionality.
- Reporting is done on an ad-hoc basis. Each person, department, or group creates and maintains their own set of reports, resulting in much duplicated effort and report latency. Inconsistency of KPIs and measures leads to confusion.
- Static reports are not up-to-date. Business managers often work from old reports.
- There is a low business user adoption rate. Business users do not have a reliable, convenient way to get their reports, so they don’t use them or use old ones.
- Maintenance of standard reports, systems, and data are out of IT's direct control.

The company is looking for an easy-to-use, robust, flexible, and powerful platform that serves as the foundation for Self-Service data discovery. They need to analyze their data from a summary to detail level. They need a system that can integrate their various data sources into “one version of the truth.”

After a lengthy evaluation process, Evans & Carter has selected Qlik Sense as the platform to use for their reporting and analysis needs.

The Sales application – your task

The Sales application is the first “app” that Evans & Carter is going to launch. The app is targeted towards the CEO and CMO and their direct reports. The Sales Manager has been involved in planning and, being a Qlik Sense advocate, wants to extend the initial app to fit the sales team’s needs and demands.

You, as business analysts, are going to build a single app for the aforementioned users. In a real-world business scenario, you would more likely design a separate app for each distinct user group. Due to the time constraints at hand you will be designing a single app.

User stories

Evans & Carter has provided you with requirements in the form of user stories. A user story is a simple statement about what a user wants to do with a feature in the application, written from a user's perspective -- an alternative to writing lengthy requirement specifications up front.

Evans & Carter user stories

The CEO (Chief Executive Officer)

As the CEO, I am responsible for aligning the company's strategic vision internally and externally. I am also responsible for facilitating business outside of the company, while guiding employees and other executive officers towards global objectives.

I work with Qlik Sense on a weekly basis and I need a prompt, thorough, and accurate overview of the company’s key performance indicators. The information will be used by me to provide the company board with an up-to-date picture of the organization’s financial position. I am not going to modify the application, because I lack technical expertise, and I need an immediate overview without having to perform complex searches.

The CEO’s KPIs and measures

Trend of total sales CYTD (Current Year to Date) and how this compares to LYTD (Last Year to Date)

- Sales by Division and Category
- Number of orders CYTD and how this compares to LYTD
- Margin percent by product group and by country

The CMO (Chief Marketing Officer)

I am responsible for activities in the organization that have to do with creating, communicating, and delivering offerings that have value for our customers.

My primary mission is to facilitate growth and increase sales by developing a comprehensive plan that will promote brand recognition and help the organization gain a competitive advantage.

I use Qlik Sense every day, on my Surface, for high level analytics but also to analyze product and sales performance on a more detailed level. I am an experienced Qlik Sense user and I know how to modify existing charts and create new sheet objects based on the underlying data model.

The CMO's measures and dimensions

CYTD Customer performance versus LYTD

- Product performance CYTD versus LYTD
- Trends
- Number of orders per product category
- Last orders placed

The Sales Manager

I am responsible for leading and guiding the global Sales teams in accordance with the company's goals. I use Qlik Sense on a daily basis and I need to create and share reports for my one-to-one meetings with my sales people. I do most of my work remotely and usually access Qlik Sense from my laptop and/or tablet.

The Sales Manager's measures and dimensions

CYTD sales persons' performance versus LYTD

- Top and bottom sales persons - based on sales
- Sales persons' performance over time

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Business analysis scenarios

During interviews with the leadership, the following use scenarios have been defined:

CEO Analysis

What is the year-on-year comparison for monthly sales, CYTD vs LYTD.

- What does the sales trend look like?
- How does the CYTD sales vary by division or region? Are there regions that are performing well in sales that can offer help (with regard to top products, and so on) to regions that are not performing that well?
- Has the order value improved since the previous year/month?
- Has the number of orders improved since the previous year/month?

CMO Analysis

The Marketing department would like to run a campaign highlighting top-selling products in the regions. Therefore, it needs to determine which products are top sellers in each region. Does this differ by region?

- Marketing would like to reach out to customers who have not made a purchase in the past six months. They need to determine who these customers are.
- What is the average number of orders each customer has made and what is the average value of these orders? Is there a correlation between these two?
- Are there many one-visit customers who have only placed an order with the company once? The CMO needs to view the customer details of these customers. Did these customers receive discounts with their orders?
- In past years, Swimwear showed poor sales. This year, a new collection is launched and Marketing has to identify the major target group for a marketing campaign.

Sales Manager Analysis

Who are the top five and the bottom five sales people?

- What are the top products for the top sales people?
- Do these sales people tend to have customers who place multiple orders or single orders?
- How is the Discount related to Average Deal Size?

The data, measures and KPIs

Evans & Carter is interested in analyzing their data over time. Time needs to be displayed based upon the Order Date field in the dataset. Analysis must be possible based upon Year, Month, or Quarter values for the entire dataset.

Main Dimensions

In order to filter the data, these fields are defined as the main dimensions:

Customer

- Country
- Sales Person
- Product Category
- Product

Key measures

Evans & Carter has defined the following Key Performance Indicators (KPIs) and measures for the analysis application.

Providing measurement visibility indicates compliance with business goals through the various ways they are presented in the analysis tool.

Ensure that these measures have the ability to be trended over time.

Measure	Description	Expression
Sales KPI	Sum of the LineSalesAmount field.	Sum(Sales)
Sales CYTD KPI	Sum of the LineSalesAmount field starting from the beginning of the current year, and continuing up to the present day	Sum(Sales * CYTDFlag)
Margin KPI	Sum of the Margin field.	Sum(Margin)
Margin CYTD KPI	Sum of the Margin field starting from the beginning of the current year, and continuing up to the present day.	Sum(Margin * CYTDFlag)
Margin % KPI	Percentage of Sales containing Margin.	Sum(Margin)/Sum(Sales)
Orders KPI	Number of individual orders.	Count(DISTINCT OrderID)

Average deal size	Sales divided by Orders.	Sum(Sales)/ Count(DISTINCT OrderID)
Number of products	Number of unique products.	Sum(RecNO_Products)
Discount	Average of the discount in percentage	Avg(Discount)