

Employee Task Overview: FMCG Performance Analytics Dashboard Development

Project Title: FMCG Performance Analytics Dashboard - Executive Decision Support System

Objective: Design and maintain an insightful, real-time analytics dashboard in Power BI to empower C-suite executives, VPs, and other decision-makers with actionable insights to drive growth and operational efficiency.

1. Executive Overview Dashboard (C-Suite Focus)

Objective: Create a real-time snapshot of overall business health. Daily Tasks: Update Metrics: Ensure key business performance indicators (KPIs) are refreshed daily with the most recent data:

- **Financial Metrics:** Total Revenue (MTD, QTD, YTD), Gross Profit Margin %, Operating Costs, EBITDA, and Cash Flow Status.
- **Sales Metrics:** Total Sales Volume, Sales Growth Rate, Top 10 Products, Top 10 Retailers, and Sales by Region (heatmap).
- **Operational Metrics:** Inventory Turnover, Order Fulfillment Rate, Warehouse Capacity, and Product Return Rate.
- **Market Intelligence:** Market Share, Customer Retention, New Customer Acquisition, Brand Health Index.

Monitor Visualizations: Check daily refresh of:

- KPI scorecards with trend indicators ($\uparrow\downarrow$).
- Revenue waterfall chart.
- Geographic heatmaps of sales (focus on Philippines).
- Time-series trend charts (daily/weekly/monthly).
- Variance analysis charts (Actual vs. Budget).

Alert System: Ensure alerts for outliers or key changes are properly set up for executives to monitor.

2. Sales Performance Analytics Dashboard (Sales Team Focus)

Objective: Monitor sales team performance and identify opportunities. Daily Tasks: Data Refresh: Update metrics on sales performance at the individual, regional, and product level.

- [Sales by Rep](#) (ranking and commission).
- [Sales by Region](#), Achievement vs. Target (individual & team).
- [Sales Conversion Funnel](#), Average Deal Size, Sales Velocity.

Product & Channel Insights: Refresh product performance data (SKU-level, Product Mix, Cross-sell & Up-sell Opportunities).

- [Sales by Retailer](#) (Supermarket, Convenience Stores, etc.), Retailer Performance, and Channel Profitability Analysis.

Customer Insights: Update purchase frequency, average transaction value, and seasonal buying patterns.

Visuals Refresh: Ensure that:

- Sales leaderboard and gamification elements are up-to-date.
- Cohort analysis charts are refreshed daily.
- Product performance matrix and funnel charts reflect current data.
- Pareto charts for identifying top-performing products.

3. Financial & Cost Management Dashboard (Finance Team Focus)

Objective: Provide insights into profitability and cost structure. Daily Tasks: Financial Data Refresh: Update revenue by category, region, and channel. Include:

- [Revenue vs Discounts](#), Payment Terms Analysis.
- [Operating Costs](#), Fixed vs. Variable Costs, Cost per Unit Sold.

Cost Structure: Ensure cost structure visuals are refreshed, such as:

- Waterfall charts for Profit & Loss.
- Cost breakdown with treemaps.
- Variance analysis comparing actual vs. budget.

Profitability Analysis: Ensure analysis on:

- Gross Margin by Product/Category.
- Contribution Margin and Break-even Analysis are updated.

4. Operations & Supply Chain Dashboard (Operations Focus)

Objective: Track operational efficiency and supply chain performance. Daily Tasks: Inventory Data Update: Refresh stock levels, stock-out frequency, overstock analysis, and aging inventory.

- [Reorder point compliance](#) and dead stock identification.

Logistics Performance: Ensure delivery performance data (on-time %) and average delivery time are refreshed.

- [Review transportation costs](#) and opportunities for route optimization.

Production Metrics: Update production efficiency and quality control metrics.

Visualizations: Ensure that:

- Inventory heatmaps by warehouse and delivery performance gauges are up-to-date.
- Time-series data for stock levels are accurately visualized.
- ABC analysis and process flow diagrams reflect real-time data.

5. Marketing Campaign Analytics Dashboard (Marketing Team Focus)

Objective: Measure marketing effectiveness and return on investment (ROI). Daily Tasks: Campaign Data Refresh: Update key campaign metrics, including:

- [ROI by channel](#), Budget vs Actual Spend, CPA (Cost per Acquisition).
- [Conversion rates](#), Reach & Impressions.

Channel Effectiveness: Ensure data on digital vs traditional performance is updated daily.

- [Social media engagement](#), email campaign performance, and influencer marketing ROI.

Attribution Analysis: Update multi-touch attribution models, sales lift from campaigns, and customer journey mapping.

Visuals Refresh: Refresh:

- ROI comparison charts.
- Campaign timelines with performance overlays.
- Attribution flow diagrams.
- Budget allocation pie charts.

6. Human Resources Analytics Dashboard (HR Focus)

Objective: Monitor workforce and HR performance. Daily Tasks: Employee Data: Refresh headcount data by department and region.

- Update employee turnover rates, hiring trends, and compensation analysis.

Performance Metrics: Ensure sales per employee and department efficiency metrics are updated.

Workforce Planning: Refresh hiring forecasts, attrition risk analysis, and gaps in succession planning.

Visuals Refresh: Update:

- Organizational hierarchy charts.
- Demographic breakdowns and turnover trend analysis.
- Compensation distribution charts.

General Technical & Platform Requirements

Platform: Power BI (ensure all dashboards are developed and maintained within Power BI).

Data Source: BigQuery tables (employees, products, retailers, sales, operating costs, inventory, marketing campaigns) – ensure data pipelines are functioning correctly to pull in the most recent data.

Refresh Rate: Data should be refreshed daily or within 5-15 minute intervals.

Mobile Accessibility: Dashboards must be responsive and functional on mobile devices.

Drill-down Capability: Ensure that drill-down capabilities for key insights (3-4 levels deep) are operational for end-users.

Success Metrics to Track:

- **Adoption Rate:** Ensure daily user engagement with the dashboards is > 90%.
- **Forecast Accuracy:** Aim for a 25% improvement in forecast accuracy with real-time data.
- **Cost Optimization Opportunities:** Track potential cost-saving opportunities with the goal of identifying \$2M+ in savings annually.

Additional Notes:

- Ensure role-based access control (RBAC) is properly configured, so only authorized employees have access to sensitive data.
- Export Options: Make sure PDF, Excel, and PowerPoint export options are working seamlessly for reporting purposes.