

# Internship Project- Retail Contract Performance

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## Project Details: Retail Contract Performance

**Purpose:** To investigate customer's compliance to the contracts and monitor the status of contracts by comparing the committed and actual volume during the whole contract term

**Data Source:**

- Retail contract
- POR-Land North American Transaction LOS\_V

**Combine data:** Used retail contract and POR data (in Tableau) to join excel file

### Steps

- ✦ Kept the following columns: customer name, Gallons (Committed Qty), WSA Start Date (i.e., the date when the contract was signed), WSA End Date (i.e., the date when the contract was ended) in order to understand the difference between the committed volume and actual volume during the whole contract term
- ✦ Used Gallons (Committed Qty ), and calculated committed volume
- ✦ Used product volume to get the actual volume

# Project Process



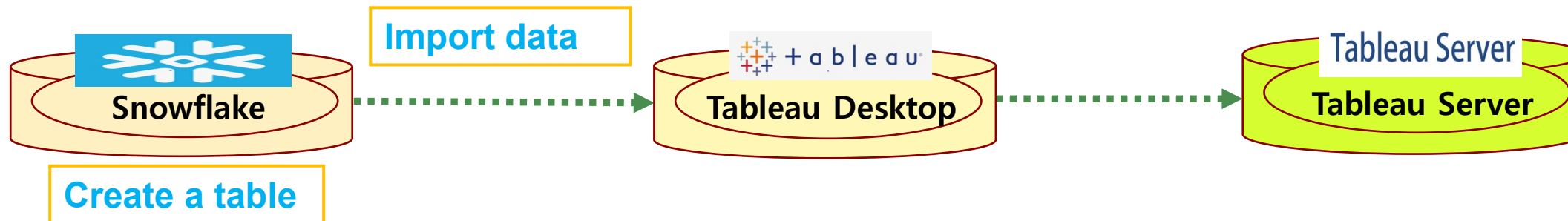
Programming Tool: **Excel**

Visualization tool: **Tableau**

## Data Building

Three methods to build data in Tableau:

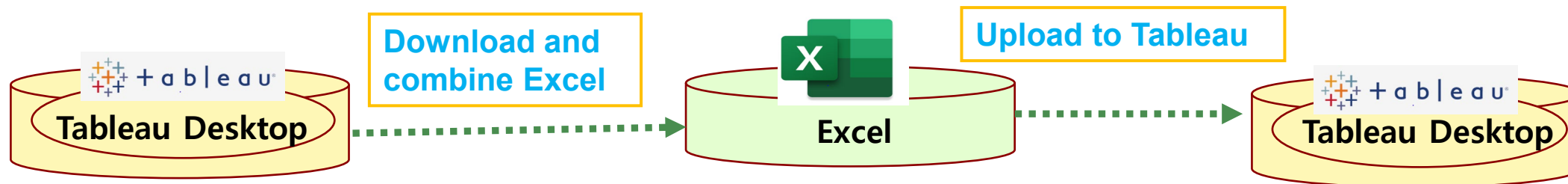
a.



b.



c.



# Data Analysis and Data Visualization

- The goal is to obtain the status of contractor compliance by comparing the committed and actual volume
- There are total 3262 contractors , of which 703 are over 50% of compliance (22%)
- Compliance indicates **actual volume/ committed volume**
- Most of contractors don't have great compliance:
  - The lower compliance means actual volume is less than committed volume, so it can negatively impact company's profit
  - This data can help the company monitor all status of customer's contract

## Retail Contract Performance

### Compare committed and actual volume

Customer Name	Customer Site	Brand	Region (POR)	Volume T..	Level of D..	Gallons	WSA Start D..	WSA End Date	Actual Vol (P..	Committed Vol	Compliance
1 PHILLIPS KWIK STO..	PENN AVE SHELL	Shell	Lower Midwest	Term	Site	9,600,000	6/11/2020	6/10/2030	2,773	80,000	3%
1ST CHOICE FOODS	1ST CHOICE FOODS	Valero	Lower Midwest	Monthly	Site	30,000	3/1/2016	2/28/2026	14,395	30,000	48%
2 GO FOOD MART	2 GO FOOD MART	Valero	Lower Midwest	Annual	Site	240,000	4/30/2015	4/1/2025	5,693	20,000	28%
3P, LLC	LOGAN STREET SHELL	Shell	Lower Midwest	Annual	Site	300,000	1/14/2007	1/13/2017	0	25,000	0%
		Suncor Shell	Lower Midwest	Term	Site	5,400,000	1/5/2021	1/4/2031	22,053	45,000	49%
4T LAND LLC	4T MARKET SHELL	Suncor Shell	Lower Midwest	Term	Site	5,400,000	7/12/2021	7/11/2031	196	45,000	0%
7 VALLEY CORPORATI..	STANG'S TRAVEL CEN..	Cenex	Lower Midwest	Annual	Site	1,362,108	11/25/2015	11/25/2025	45,607	113,509	40%
7/24 CITGO	DNU 4219 MILWAUKE..	Citgo	Great Lakes	Annual	Site	900,000	1/15/2011	2/1/2018	0	75,000	0%
7E CO 13, LLC	7E CO 13	Suncor Exxon	Lower Midwest	Term	Site	5,679,908	11/25/2019	10/31/2027	13,159	59,789	22%
10TH MARKET PL INC.	10TH ST MARKET PLA..	Suncor Shell	Lower Midwest	Term	Site	6,600,000	8/1/2019	7/31/2029	18,743	55,000	34%
12 BUCKNER, LLC	BUCKNER THRIFTWAY	Conoco Phillips	Lower Midwest	Term	Site	3,600,000	1/10/2019	1/9/2029	984	30,000	3%
26 & AUSTIN CITGO, I..	5946 W 26 ST	Citgo	Great Lakes	Annual	Site	780,000	4/1/2013	4/1/2020	12,360	65,000	19%
27 MRY INC.	27MC-605 W LAPHAM	Citgo	Great Lakes	Term	Site	7,140,000	*	*	70,332	85,000	170%
35E GAS LLC	35EG-306 E LARPENT..	ARCO	Upper Midwest	Term	Site	9,240,000	5/23/2018	5/22/2028	26,533	77,000	34%
50 HIGHWAY LAKE STOP LLC	50 HWY LAKE STOP	BP	Lower Midwest	Term	Site	10,800,000	7/13/2021	7/12/2031	58,315	90,000	65%
		Cenex	Lower Midwest	Monthly	Site	60,000	12/30/2016	12/30/2026	58,315	60,000	97%
51 HALSTED, INC.	5101 S HALSTED ST	Citgo	Great Lakes	Annual	Site	800,000	3/30/2017	3/30/2027	12,058	66,667	18%
54TH MARKET PL INC.	54TH MARKET PLACE	Suncor Shell	Lower Midwest	Term	Site	5,700,000	8/1/2019	7/31/2029	16,527	47,500	35%
55TH FUEL MART, INC.	5501 S ASHLAND AVE	AmStar	Great Lakes	Monthly	Site	81,000	3/5/2018	4/1/2025	60,172	81,000	74%
				Term	Site	5,880,000	11/11/2020	11/10/2027	60,888	70,000	87%
63RD AND DREXEL M..	850 E 63RD ST	Mobil	Great Lakes	Term	Site	7,800,000	5/31/2022	5/30/2032	278	65,000	0%
66 LAKE STOP	DNU-66 LAKE STOP	Conoco Phillips	Lower Midwest	Annual	Site	480,000	8/14/1994	8/13/2004	0	40,000	0%
71ST FOOD & FUEL INC.	130 E 71ST ST	Mobil	Great Lakes	Term	Site	6,000,000	6/22/2020	6/21/2030	5,298	50,000	11%
72 ND PETROLEUM, I..	7200S WESTERN	Mobil	Great Lakes	Annual	Site	840,000	7/14/2010	7/13/2020	8,692	70,000	12%
76 PETRO MART LLC	76PM-7405 W VILLAR..	Unbranded	Upper Midwest	Term	Site	5,400,000	6/24/2019	6/23/2029	11,484	45,000	26%
79TH KING FUEL MART	7850 S MLK DR	AmStar	Great Lakes	Monthly	Site	70,000	1/6/2022	1/5/2027	2,981	70,000	4%
86 APPLETON BP LLC	86AP-N86 W16317 AP..	BP	Upper Midwest	Term	Site	13,800,000	4/18/2019	4/18/2029	9,536	115,000	8%
87TH MOBIL PETROL I..	4000 SW HIGHWAY	Mobil	Great Lakes	Annual	Site	960,000	7/18/2010	7/18/2017	0	80,000	0%

Customer Site

All

CASS Full Address ID (POR)

(All)

Level of Detail

(All)

Region (POR)

(All)

## Compliance

Compliance	Count	Percentage
0~30%	2002	61%
30~50%	557	17%
50~80%	285	9%
80 up	418	13%

### Compliance



Compliance (color)  
and average of  
Percentage (size).

Avg. Percentage  
1.0000

Compliance  
■ 0~30 %  
■ 30~50%  
■ 50~80%  
■ 80 up

## Conclusions and Recommendations

### Use metrics to monitor contract's status

- Compliance is important indicator for managing contract. This indicator can understand what the current statuses are for each customer's contracts

### Recommendations

- Use programming to design data system to automatically generate report, so it can deal with incomplete data
- Track records of actual delivery and monitor it regularly, so it can solve the lower compliance