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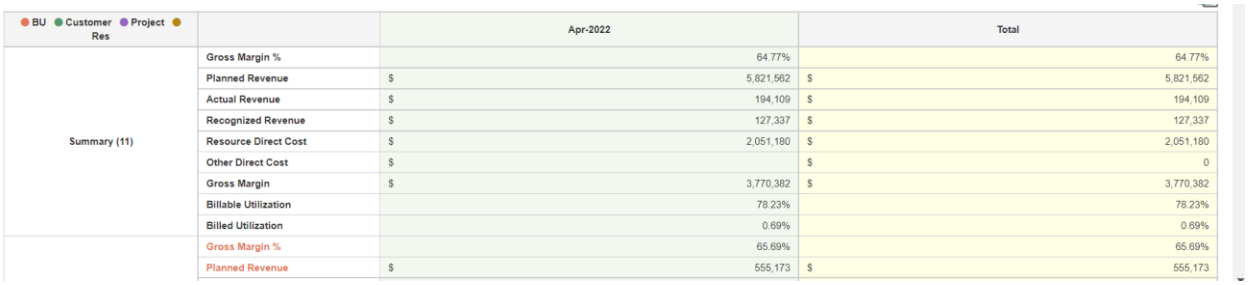
Gross Margin Analysis

In Gross Margin analysis there are different filters for selection to look for the data.

1. Data



BU Customer Project Res		Apr-2022	Total
Summary (11)	Gross Margin %	64.77%	64.77%
	Planned Revenue	$ 5,821,562	$ 5,821,562
	Actual Revenue	$ 194,109	$ 194,109
	Recognized Revenue	$ 127,337	$ 127,337
	Resource Direct Cost	$ 2,051,180	$ 2,051,180
	Other Direct Cost	$	$ 0
	Gross Margin	$ 3,770,382	$ 3,770,382
	Billable Utilization	78.23%	78.23%
	Billed Utilization	0.69%	0.69%
	Gross Margin %	65.69%	65.69%
	Planned Revenue	$ 555,173	$ 555,173

For displaying the Data as shown in the table above there are certain details considered in calculating those details.

1a. Basic data for Calculation

a. **Standard Available Hours:** 8 Hours per day
b. **Partial Available Hours:** Anything less than or Equal to 4 hours or Zero hours
c. **Gross Working Days (GWD):** Total no of days excluding Weekends & Holidays
d. **Net Working Days (NWD):** Total no of days excluding Weekends, Holidays & Leaves/Time offs

Note: Holidays based on resource calendar

e. **Role Cost Rate (RCR):**
    i. For Full Time Employees (FTE) - Median cost rate of resource based on their Designation - Cadre - BU and Country provided by Organization.
    ii. For Contractors: True cost given either in Projector or at Org level.

f. **True Cost rate (TCR):** True Cost of resources provided by Organization
g. **Gross Capacity (GC):**

i. For Business Unit Level (FTE): Gross Capacity hours in a day of resources tagged to that BU * GWD.

Note:

1. Gross Capacity of few resources are made Zero or Partially available
2. Only resources tagged to selected unit are considered

i. Business Unit level (Contractor): Total Allocated Hours of Contractor across projects * GWD
ii. Organization Level (FTE): Gross Capacity hours * GWD
iii. Organization Level (Contractor): Allocated Hours of projects

h. Net Capacity (NC):

i. For Project & Customer level: Allocated hours on project/s * NWD
ii. For BU & Org Level: Standard available hours * NWD

1b. Formulas for calculation in the Data table

a. Gross Margin % - GMA:

i. Past months**:** Recognized Revenue - (RDC+ODC) as a % of Recognized Revenue
ii. Current & Future Months: Planned Revenue -(RDC+ODC) as a % of Planned Revenue

b. Planned Revenue: Billable Allocations on project * Billing rate of resource

c. Actual Revenue: Actual Hours*Billing rate

d. Recognized Revenue:

i. Fixed & MS Projects: Billing time sheet Hours on project * Billing rate
ii. Other Project Types: Billable Approved hrs on project * Billing rate

Note: For Fixed price projects, revised Contract rate considered based on revenue recognition

e. Resource Direct Cost (RDC):

i. Project & Customer level – FTE (Current and Past Months): Billable Approved hours * Role Cost Rate (RCR) for past and current month
ii. Project & Customer level – FTE (For future months): Billable Allocation hours * Role Cost Rate (TCR)

iii. Project & Customer level – Contractors: Billable Approved hours * True Cost Rate (TCR)
iv. Project & Customer level – Contractors (For future months): Billable Allocation hours * True Cost Rate (TCR)

Note: If there is no TCR for contractors, it considers RCR

v. BU /ORG level – FTE: NET Capacity of resources tagged to unit *NWD* RCR*0.85

vi. BU /ORG level – Contractor (Past months): Billable Approved hours * True Cost Rate (TCR)

vii. BU /ORG level – Contractor (Current and Future months): NWD * True Cost Rate (TCR)

Note: Allocations on Holidays are excluded

f. Other Direct Cost:

viii. Project /Customer level: All approved Expenses submitted on a project

ix. BU / Org level: All approved Expenses submitted at BU/ Org level

g. Gross Margin ($):

i. Past months: Recognized Revenue - (RDC+ODC) in $ value

ii. Current & Future Months: Planned Revenue -(RDC+ODC) in $

Note: RDC differs for FTE & Contractor as described before

h. Billable Utilization:

i. Project & Customer Level: (Bill allocations/All allocations) * 100

ii. BU Level: (Bill allocations / Net Capacity) * 100

Note: Resource tagged to same BU: Billable Allocations as % of Gross Capacity

iii. BU Level: (Bill allocations /All allocations) * 100

Note: Resource of different Non-Rev Unit whose utilization to be shown in BU under consideration: Billable Allocations as of Total projects Allocations

iv. Org Level: (Bill allocations / Net Capacity) * 100

i. Billed Utilization:

i. Project & Customer Level: (Bill Approved /All allocations) * 100

ii. BU Level: (Bill Approved / Net Capacity) * 100

Note: Resource tagged to same BU: Billable Approved as % of Net Capacity

iii. BU Level: (Bill Approved /All allocations) * 100

Note: Resource of different Non-Rev Unit whose utilization to be shown in BU under consideration: Billable approved as of Total projects Allocations

iv. Org Level: (Bill Approved / Net Capacity) * 100

Note: Billable Approved as % of Net Capacity

j. Forecasted Revenue:

i. Project & Customer level: Manual entry in 'Forecasted Revenue' at project level for each month in Project Currency
Customer level is summarization of all projects Forecast

Note: For Fixed. MS Projects only

ii. Resource Level Forecasts: Resource Level Forecasts

Note: If no Billable allocations or billing rate for a month, forecasts are not proportioned

iii. BU level forecasts: summation of Resource forecasts tagged to the Unit

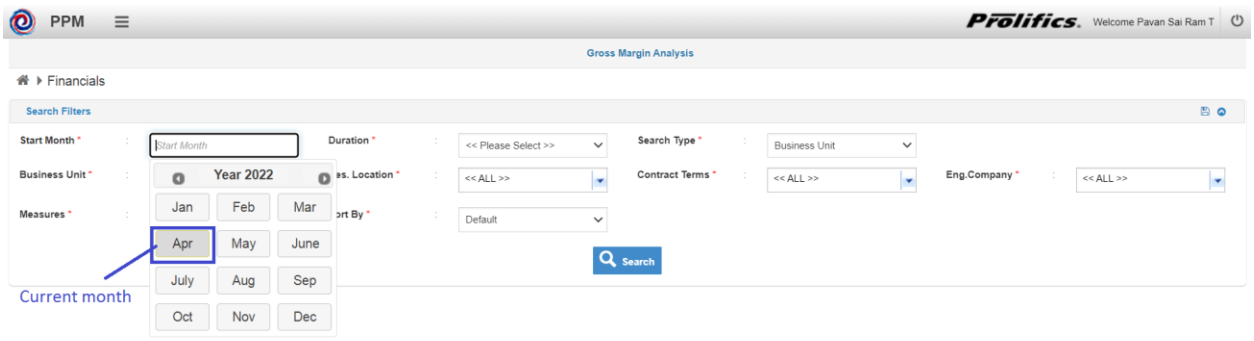
Note: Non billable units proportion tagged to primary business Unit of project

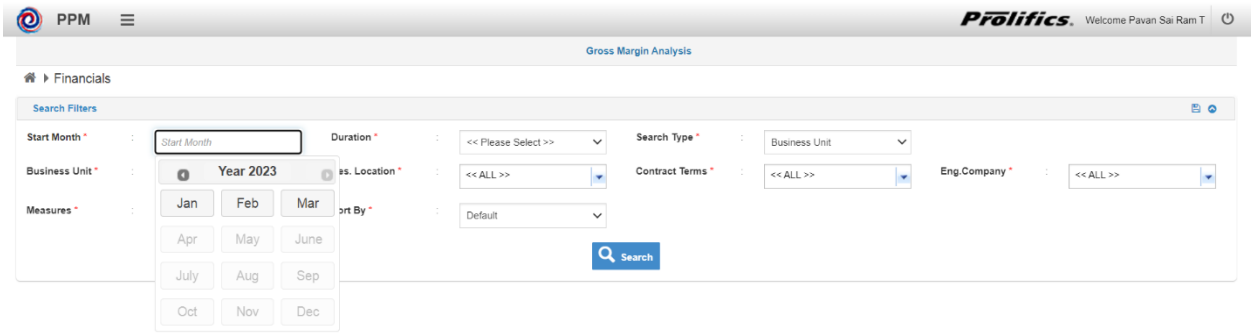
iv. County Level forecasts: Summation of resources forecasts working for project based on their country

2. Filters

2a. Start Month

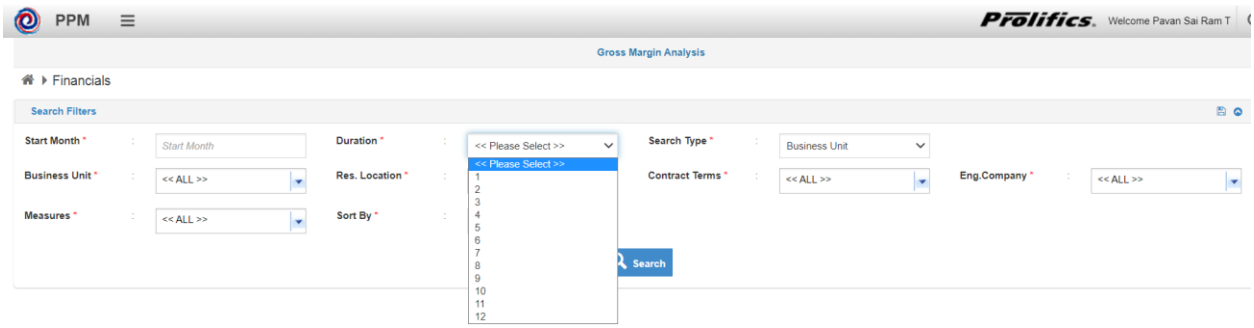
Here in this selection, we can select from which month we need to see the data and the data we can see is from 12 months from the current month.





2b. Duration

After selecting the month need to select the duration of months from that month the data need to be seen based on the Month selection can select the duration.



2c. Search Type

The Major Selection is based on the Search type we select and rest of the selections varies based on the Selection of “Search Type”

i. Business Unit
ii. Customer

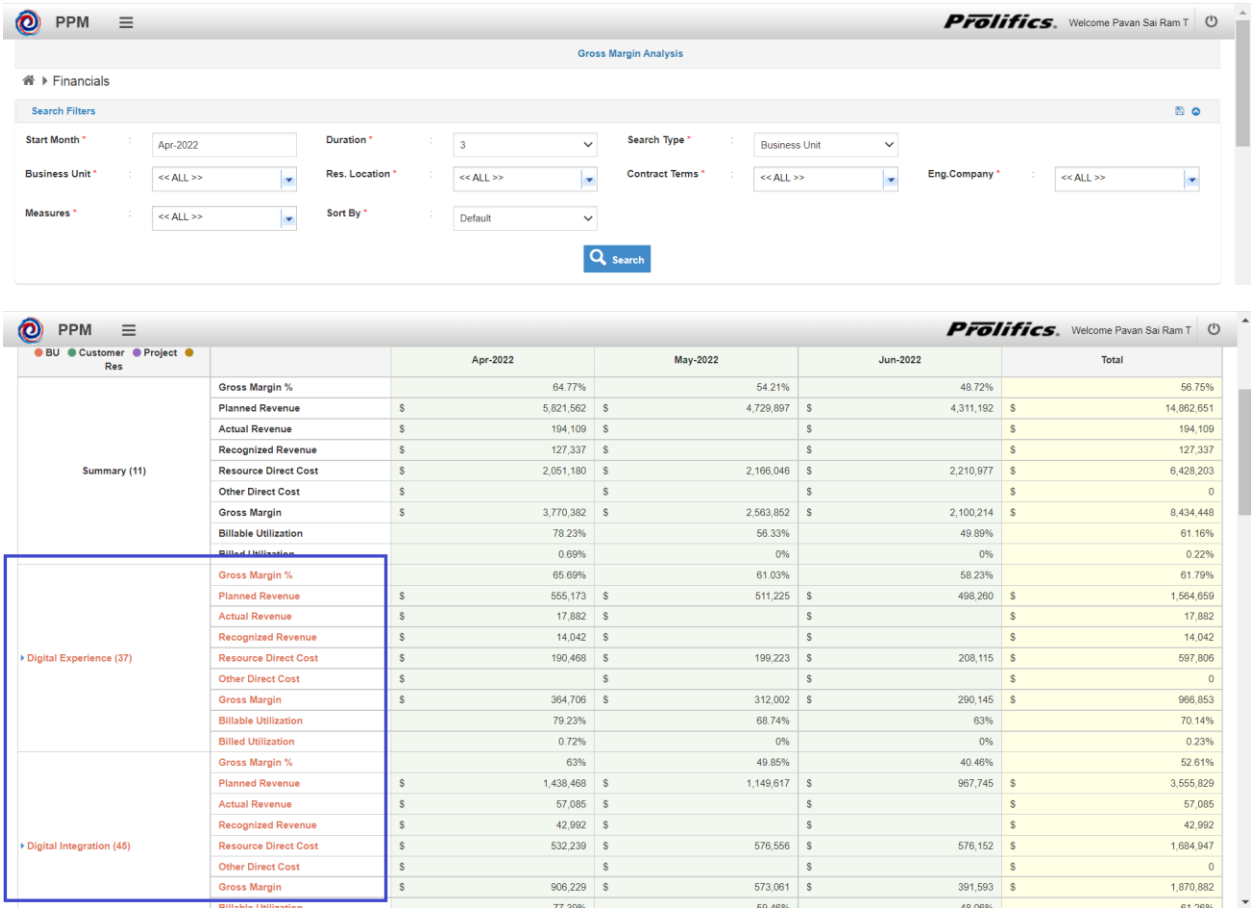
iii. Project
iv. Resource
v. Sales Executive
vi. CSL
vii. Delivery Partner
viii. Customer Industry

i. Business Unit

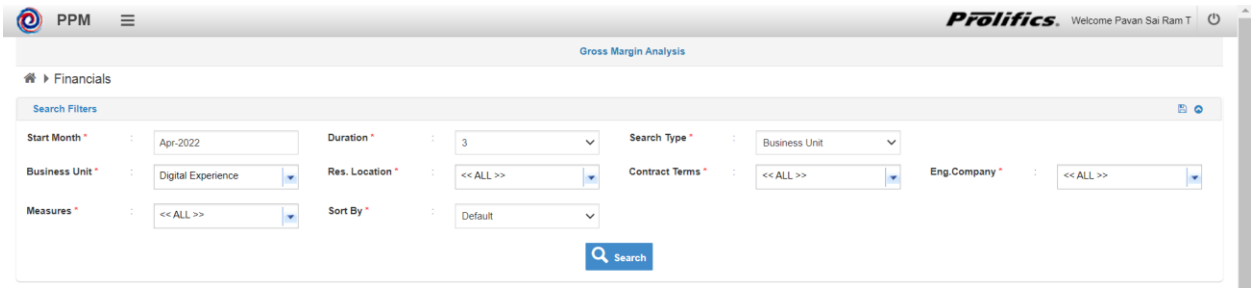
By Selecting Search as a Business Unit now a new selection Populates where in need to select the “Business Unit”.

By selecting any one or some of the business Units only data related to those Business Units will be shown in the Table.

Data Table view by Selecting “ALL” In the Business unit selection.

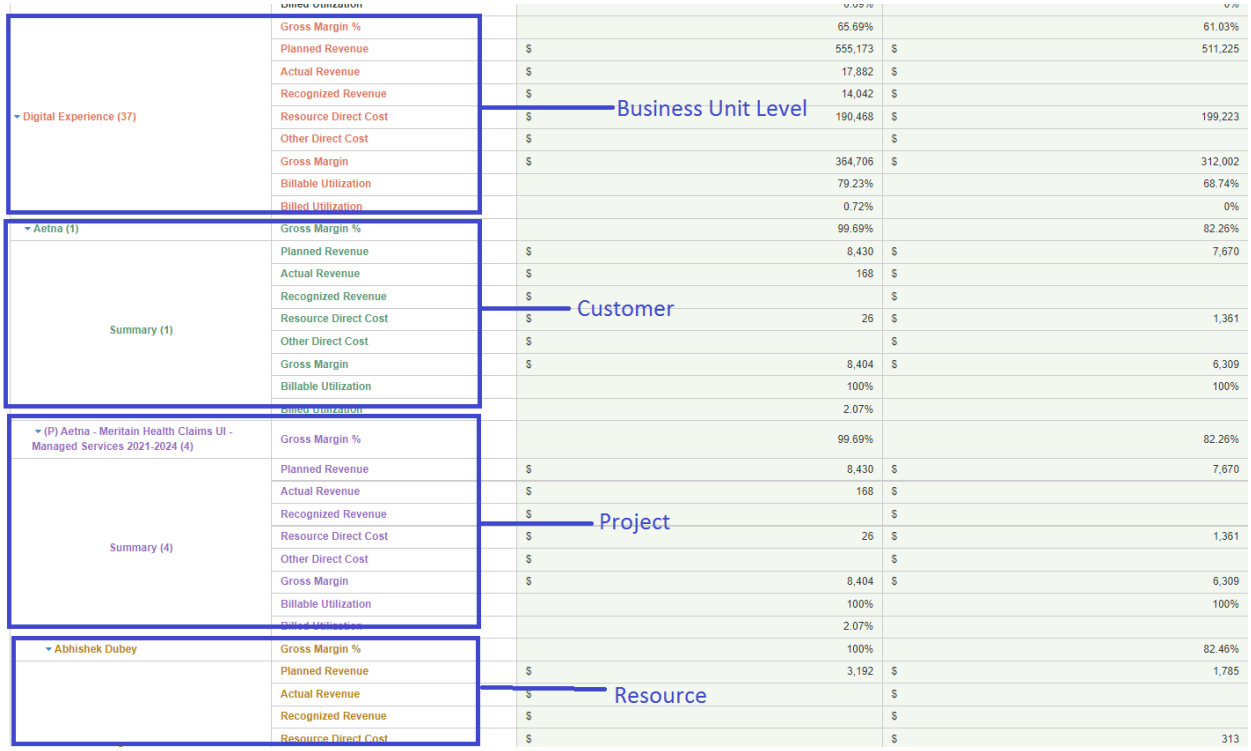


Data Table View by Selecting Only “Digital Experience” in the Business Unit selection.



BU Customer Project Res		Apr-2022	May-2022	Jun-2022	Total
Summary (1)	Gross Margin %	65.69%	61.03%	58.23%	61.79%
	Planned Revenue	$ 555,173	$ 511,225	$ 498,260	$ 1,564,658
	Actual Revenue	$ 17,882	$	$	$ 17,882
	Recognized Revenue	$ 14,042	$	$	$ 14,042
	Resource Direct Cost	$ 190,468	$ 199,223	$ 208,115	$ 597,806
	Other Direct Cost	$	$	$	$ 0
	Gross Margin	$ 364,706	$ 312,002	$ 290,145	$ 966,853
	Billable Utilization	79.23%	68.74%	63%	70.14%
	Billed Utilization	0.72%	0%	0%	0.23%
Digital Experience (37)	Gross Margin %	65.69%	61.03%	58.23%	61.79%
	Planned Revenue	$ 555,173	$ 511,225	$ 498,260	$ 1,564,659
	Actual Revenue	$ 17,882	$	$	$ 17,882
	Recognized Revenue	$ 14,042	$	$	$ 14,042
	Resource Direct Cost	$ 190,468	$ 199,223	$ 208,115	$ 597,806
	Other Direct Cost	$	$	$	$ 0
	Gross Margin	$ 364,706	$ 312,002	$ 290,145	$ 966,853
	Billable Utilization	79.23%	68.74%	63%	70.14%
	Billed Utilization	0.72%	0%	0%	0.23%

Hierarchy of the table **“Business Unit> Customers>Projects>Resources”**



ii. Customer

By Selecting Search as a Customer now a new selection Populates where in need to select the “Business Unit” of the Customer or can select as “ALL”

Customer: We have two options whether to select from all the Active Customers or can Select the Particular Customer.

By Clicking on select a New Window Populates from where a Particular customer or List of the Customers can be selected and once selecting those data related to those customers will be populated.

Eng. Location: Here can select the Eng. Location to look for those Customers in those locations.

Hierarchy of the table **“Customers>Projects> Business Unit> Resources”**

iii. Project

By Selecting Search as a Project now a new option populates where in we can search for Particular project and can view the details of that Project.

Hierarchy of the table **“Project>Resources”**

iv. Resource

By Selecting the Search Type as Resource, a new selection to Select the resource will be populated

Resource: By clicking on select resource a new window (Resource Directory) populates wherein we can search and select the resource.

Res. Type: Need to Select whether we are searching for either FTE (Full time Employees) or Contractors. Or can select “ALL”.

Hierarchy of the table **Resources**

v. Sales Executive

By Selecting the Search Type as Sales Executive, a new selection to Select the Sales Executive from the list available or can select “ALL”.

Based on the Sales Executive selected the data of that sales executive will be populated in the data table and projects related to that Sales Executive will be displayed.

Hierarchy of the table **“Sales Executive> Customers>Projects>Resources”**

vi. CSL

By Selecting the Search Type as CSL, a new selection to Select the CSL from the list available or can select “ALL”.

Based on the CSL selected the data of that sales executive will be populated in the data table and projects related to that CSL will be displayed.

Hierarchy of the table **“CSL> Customers>Projects>Resources”**

vii. Delivery Partner

By Selecting the Search Type as DP, a new selection to Select the DP from the list available or can select “ALL”.

Hierarchy of the table **“DP> Customers>Projects>Resources”**

Based on the DP selected the data of that sales executive will be populated in the data table and projects and Customers related to that DP will be displayed.

viii. Customer Industry

By Selecting the Search Type as Customer Industry, a new selection to Select the Customer from the list available or can select “ALL”.

Based on the Customer Industry selected the data of that sales executive will be populated in the data table and projects and Customers related to that Customer Industry will be displayed.

Hierarchy of the table **“Customer Industry> Customers>Projects>Resources”**

2d. Res. Location

In this selection there are List of Locations where resources were available, we can select the particular resource location or keep that selection as ALL and can pull the data required.

2e. Contract Terms

These are the terms that are created at the Engagement level of a particular project.

2f. Eng. Company

This selection is related to the Engagement company while creating the project in the PPM for each project an Engagement company is being mapped now here, we can either select that as ALL or can select the Particular Engagement company.

2g. Measures

Here by selecting the particular measure only data related to that measure will be displayed in the table.

2h. Sort By

By selecting the default in this selection, the data will be displayed as per defaults and by selecting any other filter the data will be shown as per the selection.

2i. Source

By Selecting the source such as PPM and Projector the data related will be populated.