

STANDARD OPERATING PROCEDURE (SOP)

Apex Motors PVT LTD

Document Control

Document Title : Apex Motors PVT LTD Sales Operations MIS

Version : 1.0

Prepared By : Data Analyst / Operations

Frequency : Daily MIS, Weekly Review

Tools Used : Microsoft Excel

Data Source : Apex_Motors - Sales_data CSV

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1. Introduction

The IT and Analytics function supports business and operations teams by ensuring data availability, accuracy and timely reporting for informed decision-making. This Standard Operating Procedure (SOP) defines the structured process for transforming raw bike sales data of a company called Apex Motors PVT LTD into reliable MIS reports and operational insights using Excel. The SOP ensures consistency in data handling, reporting standards and performance monitoring across teams, enabling stakeholders to track key metrics, identify issues and take data-driven actions efficiently.

2. Purpose

The purpose of this SOP is to **standardize the process of monitoring bike sales operations**, including sales volume, delivery performance, inspection outcomes and profitability, using Excel-based MIS reporting.

This SOP ensures:

- Consistent reporting
- Early identification of operational issues
- Data-driven decision support for operations teams

3. Scope

This SOP applies to:

- Bike sales data across all operational cities
- Daily operational monitoring
- Weekly performance reviews

This SOP does **not** cover:

- Financial accounting
- Vendor contract negotiations

4. Input Data

Field	Description
sale_id	Unique Transaction Identifier
sale_date	Date of Bike Sale
month	Sale Month of Year
week	Sale Week of Year
brand	Bike Manufacturer
fuel_type	Petrol / Electric
city	Sales Location
km_driven	Distance covered
km_driven	Age of Bike
selling_price	Sale Price
procurement_cost	Acquisition Cost
profit	Selling Price - Procurement Cost
delivery_days	Days Taken to Deliver
on-time	Delivery On Time or Not
inspection_status	Pass / Fail

5. Tools & Files

- Microsoft Excel
- Apex Motors Bike Sales CSV file
- Excel tables, formulas, pivot tables and conditional formatting

6. Frequency of Execution

Activity	Frequency
Data refresh	Daily
MIS update	Daily
KPI review	Weekly
Escalation review	As Required

7. Detailed Procedures

Step 1 : Data Import

1. Open Excel
2. Go to **Data** → **Get Data** → **From Text/CSV**
3. Import the latest bike sales CSV file
4. Load data as a **Table**
5. Rename the table as **Apex Motors Sales**

Step 2 : Data Preparation

Create the following helper columns:

- **Month:** Extract month-year from sale_date
- **Week Number:** Extract week number from sale_date
- **On-Time Delivery Flag:**
 - Yes → delivery_days ≤ 7
 - No → delivery_days > 7

Ensure all numeric fields are correctly formatted.

Step 3 : KPI Calculation

Calculate the following KPIs:

- Total Bikes Sold
- Total Profit
- Average Delivery Days
- Inspection Failure Percentage
- On-Time Delivery Percentage

Step 4 : MIS Pivot Tables

Create pivot tables with:

- **Rows:** City
- **Values:**
 - Count of bikes sold
 - Average delivery days
 - Average profit
- **Filters:**
 - Brand
 - Fuel type
 - Month

Step 5 : Visual Controls

Apply conditional formatting to:

- Highlight delivery_days > 10
- Highlight inspection_status = "Fail"
- Highlight negative profit values

Step 6: MIS Review

Review the MIS daily to:

- Identify cities with high delivery delays
- Monitor inspection failure trends
- Track profit consistency

8. Decision Rules

Condition	Action
On-time delivery < 90%	Flag to Operations Manager
Inspection failure > 10%	Initiate quality review
Avg delivery days > 8	Process bottleneck analysis
Negative profit entries	Cost validation required

9. Escalation Matrix

Issue	Escalation To
Repeated delivery delays	Operations Manager
High inspection failures	Quality Team
Profit inconsistencies	Profit inconsistencies

10. Deliverables

- Daily MIS dashboard (Excel)
- Weekly summary report
- Highlighted risk areas
- Action items tracker

11. Review and Continuous Improvement

This SOP should be reviewed :

- Quarterly
- Or whenever operational processes change

12. Approval

Role	Name	Date
Prepared by	Data Analyst / Operations	15-Dec-2025
Reviewed by	Self-Reviewed	16-Dec-2025
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