Organization Performance Report Card

Prashant Verma
vprash360@gmail.com

Abstract:
Each key performance indicator uses a subset of components that are displayed in each level of the technical architecture based on the metrics and strategic objectives it supports.

Introduction:
The aim of the dashboard is to provide Executives and Regional Managers with the information needed from their transactional database which can provide objectives to improve organization performance. As the organization is facing an increasingly complex environment management have less and less time to spend monitoring the key factors of the business. Therefore, the development of a dashboard which illustrate Key Performance Indicators (KPI's) can
 speed up this process and enable senior management the company catch more information than they normally would without assistance. The dashboard aims to deliver management with an overview of key performance indicators explained later.

Users:
- The dashboard design needs to consider the management and users ease of navigation through the dashboard.
- The dashboard should not display information that is more detailed than necessary and should enable the users and management
- The success and effectiveness of the dashboard will depend on the accuracy of the data used and the precision of the calculations presented.
- A simplistic design is key.

Tool and Technology:
BI Tool: Microsoft Power BI
Data Source: Point of Sale(POS), Marketing Data, Customer Data
Databases: MySQL, CSV, MS SQL Server

KPI Analysis:

1. Total Gross Profit
The aim of the KPI here is to illustrate a trend the company has been making and to provide a report on the general profit productivity of the organization.

What is it: To calculate it, simply subtract the sum of sales transactions by sum of total cost.

Why it is important: Total Gross Profit does not provide a business with specific signals on issues to focus but it highlights if there may be major issues existing or a trend which must be acted on.

2. Quarterly Performance
This Quarterly Performance KPI may be used by management of the organisation to further analyse trends in sales over these 8 quarters to find the causation for this sales downfall as well as the sudden growth as the fiscal year progresses

What is it: Analysis of calendar year sales quarterly in three months groups.

Why it is important: Analysing external factors such as promotional activity and new store openings may reveal some connection which will indicate the trends over these eight quarters.

3. Best Performing Continent:
It allows a sales manager to see a clear presentation of which continent provides them with the most sales. It tells them where their largest profit is being made and where they need to improve on and boost their sales.

What is it: Sum of sales grouped by the different continents, countries and states.

Why it is important: This KPI is important for the company as it shows them which country provides the most profit for them, meaning that it is possible for them to monitor their promotional activities in the low performing countries and work on this to increase their financial performance
.

4. Best Performing Channels:
This KPI is capable of showing the company which channels are performing the best for them, and gives them a simple overview of the sales in each of the channels.

What is it: Sum of sales/cost.profit by channels.

Why it is important: The sales manager can see which channels are performing the best and bringing in the most profit for the company.

5. Best Products/Best Promotion
The KPI represents the total profit that the company has made globally from the top 10 products sold. It shows that Projector are by far the best selling product and contributed to over 50% of the company's gross profit. This gives the company a better idea of the products that are bringing in the most profit instead of looking at their gross profit as a whole. Similarly for promotions.

What is it: It is a group by calculation.

Why it important: Promotions planning depends in product status. Both go hand in hand and sales mangers should have clarity on both.

Conclusion:
Faced with increasingly complex situations and responsibility of complex business processes, management has less and less time to spend monitoring the key factors of the business. The development of a dashboard can speed up this process and enable senior management at the organization catch more information than they normally would without assistance.