

## OUR WORK: SALES KPI REPORTING

*“If you can’t measure it, you can’t improve it.” –Peter Drucker*

We help organizations understand the top level data points that indicate how they are performing now and in the future. We combine operational experience with data comprehension in order to quickly learn the levers that move your business and how to quantify them.

### OUR PROCESS

- Assess stakeholders/audiences
- Interview relevant business teams to understand what information matters to them
- Understand business unit objectives and how to measure performance
- Catalog performance metrics
- Key Performance Indicator (KPI) definition and threshold classification
- Document data gaps that need to be filled for KPI calculation
- Finalize KPIs for use in reporting

### PROJECT SPOTLIGHT

### HIGH-TECH MANUFACTURING

**ISSUE:** A rapidly growing manufacturer of machine-learning cameras had little insight into their sales. Their per-part margins couldn’t be reviewed on a project-by-project basis. Their manufacturing forecasting was non-existent as they didn’t know how often prospects were converted into customers.

**SOLUTION:** A data discovery project was initiated to examine the data and identify reportable, actionable key performance indicators (KPI). Interviews were conducted with five departments (Sales, Engineering, R&D, Production, Implementation, and Finance) to understand the “levers” of their business unit. From the KPIs we were able to understand what data existed and what data needed to be collected.

✓ **Our 60-day discovery process gave executives the information they needed to approve a \$1.2 million project.**