Quantitative Consulting for Business

Setting up new reports

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A project for the definition of a new regular report consists of a number of steps which have to be taken in close cooperation with the client.

Target definition

- Usage of the report
- Activities to be supported by the report
- Report hierarchy

Data and Indicators

- Sources, Availability, Quality
- Interviews and workshops: How do the data describe the underlying processes?
- Creation of a systematic long list of possible indicators
- Can internal knowledge be used (additional data coding)

Analysis

- Test indicators for variability and relevance
- Discussion of usability of results

Graphical representation and validation

- Creation of report prototypes
- Choice of relevant report elements
- Discussion of example interpretations
- Fixing of thresholds and definition of „traffic light“ warnings

Implementation

- Our prototyping tool can be set up as a stand alone solution
- Integration into existing reporting system (BO, Cognos) is also possible
- User training
  - Reading examples
  - Measures to be derived from report results
- Ensure maintenance of the reporting system

From the analysis work on the data and the discussions in the workshops, a list of indicators and report elements is created.

Example: B2B Sales report

Indicators	Segments	Report elements

• Revenue (MEUR)
• Profit (MEUR)
• Margin (%)
• Price level (in % of List price)
• Revenue from core products (% total revenue)
• Revenue from extras (% total revenue)
 	
To be detailed
• Data source for each element
• Calculation method
	• Client industry
	  • Client group
	    • Client
	• Region
	  • Sales representative
	    • Client
	• Product group
	  • Core product
	  • Associated Extras
	
	To be detailed
	• Data source for each element
		• **Key indicator sheet**
		  • Revenue, Profit, Margin, Revenue from Extras
		  • YTD, (Y-1)TD, Delta %
		  • Time series since (Y-1), 3 months mov. average
		• **Top 10-sheet**: Create key indicator sheet for top 10
		  • Client groups,
		  • Product groups
		• **Price level sheet**
		  • Price level vs. Revenue
		• **Benchmark sheet**: Margins obtained / product

The report hierarchy has to be defined and reading examples are given for the report on each level.

Example: B2B Sales report, report hierarchy

Management report	Regional report	Sales representative report

• Key indicator sheet / group level
• Key indicator sheet / regions
• Top-10 sheet product groups / group level
• Top-10 sheet client groups / group level
• Price level sheet / group level
    • client groups
• ...
	• Key indicator sheet / region
	• Key indicator sheet / other regions
	• Key indicator sheet / sales representatives
	• Top-10 sheet product groups / region
	• Top-10 sheet client groups / region
	• Price level sheet / region
	    • Client groups
	    • Sales representatives
	• Benchmark sheet / region
	• ...
		• Key indicator sheet / region
		• Key indicator sheet / sales rep.
		• Key indicator sheet / other sales rep
		• Top-10 sheet product groups / sales rep.
		• Top-10 sheet client groups / sales representative
		• Price level sheet/ sales rep.
		    • clients
		• Benchmark sheet / region
		• ...

Our report tool is designed for fast prototyping. It significantly speeds up the process of analysis, graphical representation, discussion and validation.