



# **Key Performance Indicators (KPI) List – Sales and Margin Analytics**

Release 1.5

Mar 2020

## Sales and Margin Analytics KPIs

Sr #	Dashboard	KPI	Description	Drill Through Reports
1	Dashboard	Daily Cumulative Sales & Monthly Target	A quick view of how overall sales are performing against the monthly plan.	Daily Sales by Customers
2	Dashboard	Daily Cumulative Profit & Monthly Target	A quick view of how overall profit are performing against the monthly plan.	Daily Profits by Customers
3	Dashboard	Overview	Companion report to the daily Cumulative Sales & Monthly Target report.	
4	Dashboard	Yearly Cumulative Sales	A quick view of how overall sales are performing against the yearly plan.	Yearly Cumulative Sales Details
5	Dashboard	Sales Year over Year Comparison	Shows 4 years of sales data overlaid for easy comparison.	
6	Sales Overview	Executive Summary	High-level sales and margin KPI	
7	Sales Overview	Sales Vs Target	High-level KPI giving an 'at a glance' budget versus sales.	
8	Sales Overview	Lowest Margins by Items	Shows lowest margin items by sales hierarchy and time.	Customer Sales and Margin by Item
				Line Item Details
9	Sales Overview	Sales vs. Target by Salesperson	A quick view of Salesperson performance versus budget.	
10	Sales Overview	YoY Summary	High-level KPI comparing current year sales versus previous year sales.	
11	Sales Overview	Top Shrinking Sales by Item	YOY comparison of items with shrinking sales by any dimension.	
12	Sales Overview	Top Shrinking Margin % by Item	YOY comparison of items with shrinking margin % by any dimension.	
13	Sales Overview	Top Shrinking Sales by Customer	YOY comparison of customers with shrinking sales by any dimension. Can pre-alert possible customer churn.	
14	Sales Overview	Top Shrinking Margin % by Customer	YOY comparison of customers with shrinking margin % by any dimension. Help identify product mix or possible contract issues.	

15	Sales Overview	Top Shrinking Sales by Sales Person	YOY comparison of salespeople with shrinking sales. Used by salesperson or sales management to identify potential customer issues. Can pre-alert possible customer churn.	
16	Sales Overview	Top Shrinking Margin % by Sales Person	YOY comparison of sales people with shrinking margin % by any dimension. Help identify product mix or possible contract issues.	
17	Sales Overview	Top Growing Sales by Item	YOY comparison of items with growing sales by any dimension.	
18	Sales Overview	Top Growing Margin % by Item	YOY comparison of items with growing margin % by any dimension.	
19	Sales Overview	Top Growing Sales by Customer	YOY comparison of customers with growing sales by any dimension.	
20	Sales Overview	Top Growing Margin % by Customer	YOY comparison of customers with growing margin % by any dimension.	
21	Sales Overview	Top Growing Sales by Sales Person	YOY comparison of salespeople with growing sales. Used by a sales person or sales management to manage salesperson performance.	
22	Sales Overview	Top Growing Margin % by Sales Person	YOY comparison of salespeople with growing margin % by any dimension.	
23	Item Insights	Sales and Margin by Item Attributes	<p>Deep dive to see sales and margin for any item attribute tracked by the business (i.e. Item Class, Color, Material Type, etc.).</p> <p>Also used to show sales by attribute for specific customers or customer classes.</p>	Line Item Invoice Details for Item Attributes
				List of Unique Items within an Item Attribute
				Sales and Margin by Inventory Category
				Sales and Margin by Salesperson by Customers
				Sales and Margin by Salesperson
24	Item Insights	12 Months Moving Average - by Sales	Trending report that shows sales (units and dollars) and margins over time. This report yields deep	Sales by Inventory Category
				Sales by Items

		- by Units	insights into product attributes over time.  This report also allows you smooth sales patterns by displaying a 12-month moving average.	Yearly Cumulative Sales Details Sales by Sales Person Sales by Line Item Details
25	Item Insights	Item Mix by Item Attributes	The pie chart gives quick access to product sales mix information over any product attribute.	
26	Item Insights	Item Mix Over Time	Product sales mix over any product attribute over time.  Very useful for product lifecycle management.	
27	Item Insights	Sales by Customer Class by Item Attributes	Stacked bar cross-reference report that shows customer class sales over product attributes.  Customer mix over product attributes.	
28	Item Insights	Sales by Item Type & Item Category	Gives the high level information of major contribution in sales by a combination of item type and item category	
29	Item Insights	Sales by Item Attributes – Tree Map	A different way to view the product sales mix. Treemap charts can be more informative than standard pie chart representations.	
30	Item Insights	Unit Forecasts and Sales Trends	This report is used to help forecast future sales by comparing actual unit sales with sales people’s unit forecasts within a single view. These future sales volumes can be used by purchasing to procure the correct amount of raw materials to support future sales.	
31	Item Insights	SKU Sales and Quantity Sold	Analyze the stock keeping unit onshelf and quantity sold.	Approved Vendors SKU On-Hand
32	Customer Insights	Top Customer/Parent	A quick view of top customers by sales for any customer attribute	Customer/Parent Sales by Month Customer/Parent Sales by Item Attribute

33	Customer Insights	Top Growing Sales by Customer /Parent YoY	A quick view of top growing customers by sales YOY for any customer attribute.	Customer/Parent Sales by Shipping Location
				Customer/Parent Sales by Item Attribute
				Customer/Parent YoY Monthly
34	Customer Insights	Top Shrinking Sales by Customer /Parent YOY	A quick view of top shrinking customers by sales YOY for any customer attribute.	Customer/Parent Sales by Shipping Location
				Customer/Parent Sales by Item Attribute
				Customer/Parent YoY Monthly
35	Customer Insights	Board Report – Sales Analysis	A high level report that shows board level view of Sales, Targets and Forecasts by year and by month. Can be run for customers or customer classes.	
36	Customer Insights	Sales and Margin by Customer Over Time	Trending report that shows sales and margin over time. This report yields deep insights into customer attributes over time.	List of Sales by Customer Name #
				List of Sales by Sales Person by Customer
				Sales by Customer Class by Customer Name #
				Sales by Line Item Details
37	Customer Insights	Sales and Margin by Customer Attributes	Deep dive to see sales and margin for any customer attribute tracked by the business (i.e. Customer Class, Sales Channel, Pricing Category, etc.).  Also used to show sales by attribute for specific products or product classes.	Line Item Invoice Details for Customer Attributes
				List of Sales by Customer Attribute
				List of Sales by Parent by Attribute Value
38	Customer Insights	Sales by Item Type and Customer Class	Multi-dimensional stacked bar report that shows sales of each item type across customer classes (X-Axis)	
39	Customer Insights	Customer Ship-To Listing with Sales History	Tabular report that shows detailed customer information and three years of sale history. Excellent report to assist in segmenting customers into specific attributes.	

40	Customer Insights	Top Growing Customers YTD versus PY %	List of top growing customers in terms of sales compared to the previous period	
41	Customer Insights	Top Growing Sales by Customer/Parent Calendar Date Comparison	Powerful report that compares growing sales data between any two time periods.	
42	Customer Insights	Top Shrinking Sales by Customer /Parent Calendar Date Comparison	Powerful report that compares shrinking sales data between any two time periods.	
43	Sales People Insights	Sales and Margin by Sales Hierarchy	Displays sales and margin by the salesperson. Excellent report to compare salespeople performance.	Line Item Invoice Details for Sales Person
44	Sales People Insights	Sales Targets Versus YOY	Trending report showing two years of sales history versus current targets by fiscal periods. Used to manage sales performance to target. Available by sales hierarchy or salesperson.	Sales by Customer Name #
				Sales by Items by Speople
				Sales by Inventory Category
				Sales by Sales Person
				Sales by Customer Address
45	Sales People Insights	Sales and Targets by Customer /Parent	Measures customer-level forecasts versus sales performance. Can be used to manage market channel or individual customers.	Sperson by Parent Versus Target
				Customer Targets vs YOY
				Line Item Invoice Details for Customer Attribute
46	Sales People Insights	Sales Forecast by Customer by Item	Shows sales and product forecast to improve customer/item forecasts by the salesperson. Used to manage sales forecast by the customer by item.	By Item Class
				By Item
				By Customer by Item
				By Customer
47	Sales People Insights	Trending Sales Forecast with Targets	Trending report for sales and product forecast used to improve customer/item forecasts. Used to manage sales forecast by the customer by item.	By Customer Class
				By Customer by Item
				By Customer
				By Item
				By Item Class
48	Sales People Insights	Unforecasted Sales Ratio	Report highlights unforecasted sales by customer by item. Used to fine-tune item forecasts to improve manufacturing efficiencies.	By Customer for Unforecasted Sales

49	Sales People Insights	Sales and Bookings	Shows actual sales, targets and open orders for all fiscal periods. The report helps identify late orders and show order backlog.	Open Orders by Sperson by Order
				Invoice Details
				Sales Order Details
				Orders by Sales Person
				Open Orders by Line Item Detail
50	Sales People Insights	Profit and Bookings	Shows actual Profits, Profit targets and open orders for all fiscal periods.	Invoice Details
51	Sales People Insights	Book To Bill	Book to Bill is a standard measure which can be used as a gauge for how well the sales is progressing to plan and to predict future demand.  A Book-to-Bill ratio > 1 is considered good and <1 shows a slowdown in growth.	Total # Orders Details
				Existing Customer Order Details
				# of New Order Details
52	Sales People Insights	Late Orders Report	The tabular report displays the details about the late orders (open orders that are older than the current date). It is a useful report for the shipping function to manage their backlog in terms of Prioritizing which orders to pick/ship, updating the customer that their order is late and expediting the outbound shipping	Late Open Orders Details
53	Sales People Insights	12 Months Moving Average Gross Profit \$	Trending report that shows Gross Profit \$ and margins over time. This report yields deep insights into profitability over time.  This report also smooths profit patterns by displaying a 12-month moving average	Sales by GP \$ by Customer Class
				Sales by GP \$ by Inventory Category
				Sales By GP \$ by Line Item Details
				Sales by GP \$ by Sales Person
54	Sales People Insights	Average Order Value	Get the overall average order value as on date or for a specific period	
55	Sales People Insights	# of Written Orders	Get the count of written orders as on date or for a specific period	
56	Sales People Insights	Conversion/Close rate	What is the conversion rate of orders from the traffic?	
57	Sales People Insights	Sales/Traffic	What is the sales amount from the traffic?	

58	Sales People Insights	Payroll hours and Dollars by Sales Persons	Get the insights of efforts made by salesperson and dollar amount got by him	
59	Sales People Insights	Written AND Completed Sales by Sales Persons	A comparative insights between written and completed sales by sales persons	
60	Sales People Insights	Written Sales to Hours Comparison	Comparison of written sales to hours worked or payroll dollars	
61	Sales People Insights	Completed Sales by Sales Persons	Get insights of completed sales (written and open) by sales persons	
62	Transaction Insights	Sales and Margin: Invoice Header Analysis	Analyze invoice header dimensions like promotions, discounts and payment terms.	List of Unique Items within Attribute
				Sales and Margin by Inventory Category
				Sales and Margin by Sperson
				Sales and Margin by Sperson by Customer
				Line Item Invoice Details for Item Attributes
63	Transaction Insights	Invoice Header Sales Mix	Sales by order/invoice header dimensions like promotions, discounts and payment terms.	
64	Transaction Insights	Invoice Header Sales Mix Over Time	Order/invoice sales mix over any dimension over time.  Very useful for determining customer order patterns over time	
65	Transaction Insights	Sales and Margin Invoice Trending	Trending report that shows sales and margin over time. This report yields deep insights into order/invoice header dimensions like promotions, discounts and payment terms.	Sales by Inventory Category
				Sales by Line Item Details
				Sales by Sales Person
				Yearly Cumulative Sales Details
				Sales by Items
66	Transaction Insights	Sales and Margin: Invoice Detail Analysis	Sales by order/line detail dimensions like discounts, backorders, ledger accounts and configuration parameters.	Line Item Invoice Details for Item Attributes
				List of Unique Items within Attribute
				Sales and Margin by Inventory Category



				Sales and Margin by Sperson
				Sales and Margin by Sperson by Customer
67	Geographical Insights	Sales Heat Map by State	Graphical map representation of sales data by country/state.	
68	Ranking Reports	Top Items	Top selling nn items by multiple dimensions.	Item Sales by Customer
				Item Sales by Customer Class
				Item Sales by Customer Type
				Item Sales by Month
69	Ranking Reports	Top Item Attributes	Top selling nn item attributes by multiple dimensions.	Item Category Sales by Item
				Item Sales by Customer Class
				Item Sales by Customer Type
				Item Sales by Month
70	Ranking Reports	Top Customer/Parent	Top nn customers by multiple dimensions.	Customer/Parent Sales by Month
				Customer/Parent Sales by Item Attribute
71	Ranking Reports	Top Customer Attributes	Top nn customer attributes by multiple dimensions.	Sales By Customer / Parent
				Item Sales by Month
72	Inventory Turnover	DSI Summary	Overall day sales inventory.	
73	Inventory Turnover	Inventory Trending Report	Inventory valuation across multiple dimensions.	Inventory Trending Report - Inventory Valuation
74	Inventory Turnover	Work Order Unit Costs over Time	Trending cost report analyzes costs (Material, Labor, overhead) fluctuations.	By Item, By work Order
				By Month, By Work Order #
				By Item, By Month, By Work Order #
75	Inventory Turnover	% On Time Customer Shipment	Analyze the shipment trends over months and find out late vs on-time shipments.	Late Order Details
76	Inventory Turnover	DSI by Items	Days Sales Inventory (quantity and cost) by item for inventory management purposes.	Late Order Details
77	Summary Dashboard	Customer Sales Previous Month vs Current Month	Compare the Month over Month sales for current year and analyze it for each customer using customer filter.	

78	Summary Dashboard	YTD Overview	A simple score card of sales, target and achievement present day's overview.	
79	Summary Dashboard	Customer Monthly Sales	Get the insights of monthly sales and analyze it for each customer using customer filter.	Line Item Details for Monthly Sales
80	Summary Dashboard	Top Customers with Outstanding Balances	Find out the outstanding balances from each customer.	Aged Invoices
81	Summary Dashboard	YTD Sales Summary by Location	Get the summary of sales per location for present year.	YTD Sales by Location Details
82	Summary Dashboard	Quotes by Customers	Get the insights of top quotes by customers.	Quotes Details
83	Summary Dashboard	Quotes by Products	Get the insights of top quotes by products.	Quotes Details
84	Summary Dashboard	Quotes by Vendors	Get the insights of top quotes by vendors.	Vendor Quotes Details
85	YoY Insights	Sales and Margin YOY Comparison by Item Attribute	Compare the sales and margin from previous year with current year various item attributes.	YoY Line Item Invoice Details for Item Attributes
86	YoY Insights	Sales and Margin YOY Comparison by Customer Attribute	Compare the sales and margin from previous year with current year various customer attributes.	Line Item Invoice Details for Customer Attributes
				Customer Listing within Customer Attributes
87	YoY Insights	Sales and Margin YOY Comparison Over Time	Compare the sales and margin from previous year with current year over months.	Sales and Margin by Item Type (YOY)
				Sales and Margin by Customer Class (YOY)
				Sales and Margin by Item Class (YOY)
				Sales and Margin by Item Category (YOY)