

Business Intelligence Goals

- Implement company wide data strategy – highest level
- Begin with highest-impact area(s) in context of broad BI objectives
- Deploy a Data Warehouse to consolidate to a single source of data
- Create normalized view across divisions of organization for improved visibility and actionability to manage inventory, financials, operations (among other functional areas)



Risks & Issues

Current Risks

- Data extraction, consolidation and reporting is inefficient largely due to disparate data sources and operational variability between divisions
- Data consolidation / normalization in some systems could be challenging, per multiple business and data analysts
- Some members of the organization are skeptical that greater transparency and visibility into key metrics will create improvement in day-to-day operations

Initial Recommendations

Blue Margin's assessment and understanding from Acme is that all data sources should be consolidated into one functional and reportable data warehouse.

It is our recommendation that we focus on an effort to consolidate sources from each division into one reporting warehouse and develop reports to support each focus area of the business, while ensuring adoption of those reports is top-of--mind

Personas & Key Metrics

Department ▾

- Finance
- Human Resources
- Inventory
- Operations
- Sales

Department Goal / Desired Business Outcome

Better visibility into overall health of the entire organization, while providing ability to monitor performance within each division and it's subsequent regions

Organizational Personas

Companywide
Division
Region

Companywide > Division > Region > Person(s)

☐ **Finance**

☐ **Executive**

☐ **Northern**

☐ N/A

☐ **Eastern**

☐ N/A

KPIs / Key Metrics

Contribution Margin

Days in A/R

Days Sales Outstanding

EBITDA

Gross Profit Margin

Inventory Turnover

Liquidity Ratio

Data Sources

Sage ERP

Implementation Strategy

Phase No. Phase	Description	Outcomes	Duration
1 Sales	Create more predictable revenue through better visibility and insights from data captured from the CRM systems.	Grow backlogged revenue to 3MM by Q4, 2019	60 - 70 days
2 Operations	Improve visibility on open orders, stock levels, and shipment commitments to improve on-time delivery	Improve one day fill rate percentage from current (94%) to 98% by Q1, 2020.	Next 40 - 50 days
3 Finance	Create better visibility across divisions of the organization in order to eliminate surprises and improve decision-making capability	Increase divisional profitability by 5% before Q2, 2020.	Next 30 - 40 days
4 TBD			TBD

Steering Committee

Key Personnel

A. Tourney
 Committee Member

Finance / HR
 Department



B. Thompson
 Committee Member

Operations
 Department

J. Thompson
 Committee Member

Sales / Business Development
 Department

K. Williams
 Committee Member

IS
 Department

GOAL: Continued focus, evaluation, and alignment across the organization for a managed and consistent business intelligence reporting environment.

Strategy Review Cycle

