Fortune 500 Retailer

Case Study: Driving profitable sales

Learn how Axis used intelligent data design to help analyze retail sales profitability

CHALLENGE

How can we empower field managers with actionable store sales information?

Like many companies, our client relied on a legacy sales reporting system that generated reams of performance numbers but required field leaders to spend valuable time manipulating data to find insights that were truly actionable.

All the store performance numbers were there - sales, inventory and customer satisfaction figures - but the speadsheets they emailed out didn't tell managers what they actually could do to improve a store's performance today.

Our client needed a way to cut through all the noise.

APPROACH

Axis prioritized several areas for a sales and profitability dashboard.

1. Focus attention on stores and departments that need immediate attention

2. Identify opportunities to align a store's inventory with sales performance

3. Provide a "one-stop" performance overview for a store, district or region

PERSONA 1

Regional VPs
Oversee sales and performance
strategy for all districts in a region

Business Goals
1. Increase sales and meet regional targets
2. Identify leading and lagging stores / districts
3. Compare trends across store hierarchy

PERSONA 2

District Managers
Visit, review and assist stores
in a particular district

Business Goals
1. Find stores that are behind sales targets
2. Align departmental inventory to sales
3. Compare performance of stores in a district

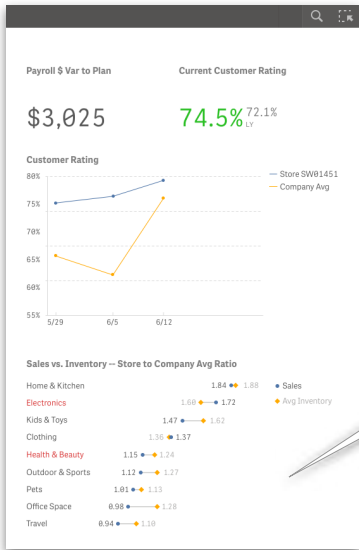# SOLUTION

## Dashboard showing 360° view of sales

Multi-store Analysis
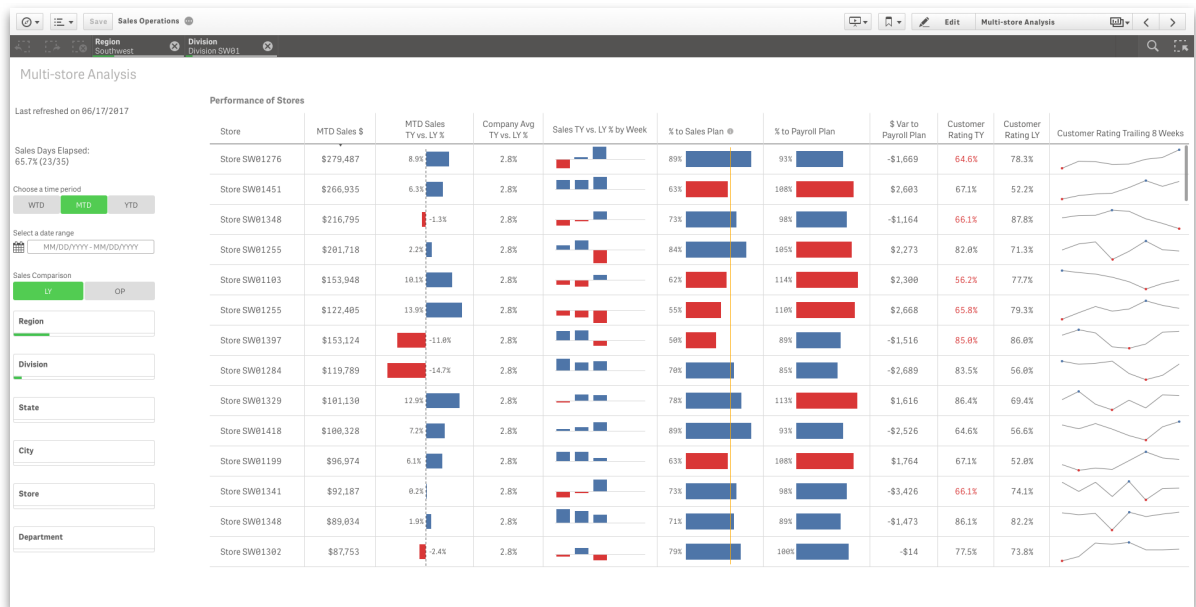
The Multi-store Analysis screen shows the key information for a defined set of stores. Managers compare store sales, targets and trends so they can have conversations with district managers about performance at specific stores.

Single Store Analysis

The Single Store Analysis screen serves as a tear sheet when a manager visits a store, including an innovative view used to adjust department inventory to align with actual sales.

Sales vs. Inventory -- Store to Company Avg Ratio

Department	Sales	Avg Inventory
Home & Kitchen	1.84	1.88
Electronics	1.60	1.72
Kids & Toys	1.47	1.62
Clothing	1.36	1.37
Health & Beauty	1.15	1.24
Outdoor & Sports	1.12	1.27
Pets	1.01	1.13
Office Space	0.98	1.28
Travel	0.94	1.10

● Sales   ◆ Avg Inventory

Payroll $ Var to Plan: $3,025

Current Customer Rating: 74.5%   72.1% LY

Axis designed a custom visualization that shows managers when a store's sales are outpacing its inventory. Longer lines show a manager she needs to adjust an imbalance. Managers want to see that a store's inventory ratio is just past the sales ratio, which shows the store has enough inventory on hand. If inventory is to the left of sales, the store is likely to be short-stocked in an area.
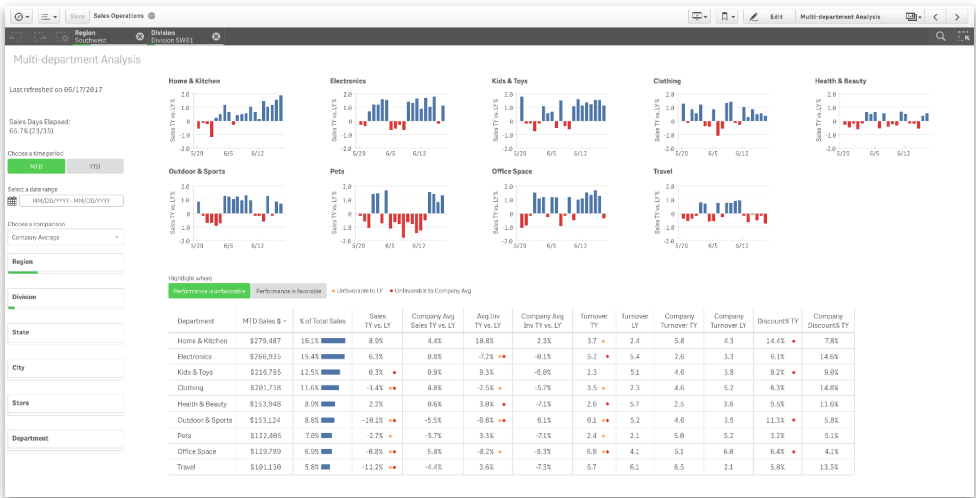
Multi-department analysis

The Multi-department Analysis screen shows a snapshot of each department's performance against plan and other stores. The screen draws the manager's attention to specific areas where performance is favorable or unfavorable.

Department	MTD Sales $	% of Total Sales	Sales TY vs. LY	Company Avg Sales TY vs. LY	Avg Inv TY vs. LY	Company Avg Inv TY vs. LY	Turnover TY	Turnover LY	Company Turnover TY	Company Turnover LY	Discount% TY	Company Discount% TY
Home & Kitchen	$279,487	16.1%	8.9%	4.4%	10.8%	2.3%	3.7	2.4	5.8	4.3	14.4%	7.8%
Electronics	$266,935	15.4%	6.3%	0.8%	-7.7%	-8.1%	5.2	5.4	2.6	3.3	6.1%	14.6%
Kids & Toys	$216,795	12.5%	0.3%	8.9%	9.3%	-6.0%	2.3	5.1	4.6	3.8	9.2%	9.0%
Clothing	$201,718	11.6%	-1.4%	4.8%	-2.5%	-5.7%	3.5	2.3	4.6	5.2	8.3%	14.8%
Health & Beauty	$153,948	8.9%	2.2%	0.6%	3.8%	-7.1%	2.6	5.7	2.5	3.6	9.5%	11.6%
Outdoor & Sports	$153,124	8.8%	-10.1%	-5.5%	-9.8%	6.1%	6.1	4.6	3.5	11.3%	6.5%
Pets	$122,605	7.0%	-2.7%	-5.7%	3.3%	-7.1%	2.4	2.1	5.0	5.2	3.2%	5.1%
Office Space	$119,789	6.9%	-0.8%	5.8%	-8.2%	-8.3%	8.0	4.1	6.0	6.4%	4.1%
Travel	$101,130	5.8%	-11.2%	-4.4%	3.6%	-7.3%	5.7	6.1	6.5	2.1	5.8%	13.5%

Last refreshed on 06/17/2017

Sales Days Elapsed: 65.7% (23/35)

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Axis Group designed a dashboard for us that was nothing short of miraculous.

Axis designers uncovered the different business goals of our sales leadership team and translated them into a rich, effective dashboard that works for each of us. Their design is sure to help us reveal new insights in store performance.

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AXIS
axisgroup.com