

## Performance Metrics Reporting

The existence of a business is dependent on making a profit. The level of profitability depends on how the business is managed.

Because your business uses a state-of-art ERP system, you can manage your business for maximum profitability by measuring and analyzing key performance metrics.

MCS has developed key performance metrics reports that work with the Syspro ERP system, as follows:

- a) **Profitability Performance** – Used to analyze sales, cost and profit margin by customer, product class and stock code.

*Who are your most profitable customers? What are your most profitable products?*

- b) **Sales Performance** – Used to analyze current year actual sales relative to prior year sales by salesperson, customer, product class and stock code. Optionally track current year sales to sales targets defined by customer and stock code.

*Who are your most productive salespeople? Are sales improving or deteriorating for specific customers or specific products? Are sales in line with the business plan budget?*

- c) **Delivery Performance** – Used to analyze complete and on-time delivery of sales orders by customer, warehouse, product class, stock code or invoice.

*Do you delight customers by consistently meeting or beating promised delivery dates? Do you put your customer relationships at risk with chronic partial or late shipments?*

- d) **Inventory Performance** – Improper planning for raw materials and finished goods stock is the primary reason that companies are **not** profitable! This report analyzes inventory turns by stock code or product class.

*Do you regularly run out of raw materials that adversely impacts manufacturing efficiency and delivery performance? Do you have money locked up in excess inventory that would be better off as cash in the bank? Do you know that APICS estimates the cost of carrying inventory at 35% of its value...per year!*

- e) **Labor Performance** – Used to analyze the efficiency and utilization of your labor force by department, work center, employee and job. Historical efficiency by stock code can also be run to determine if labor standards need adjusted for a specific stock code.

*What is your true productivity on the shop floor? Are work centers being properly utilized? Do specific employees consistently run at low efficiency levels? Does poor production attainment require the production schedule to be re-planned daily? Is this causing poor delivery performance?*

**“A company can only manage what it can measure”**

**“Profitability is the fruit of good management”**

# Profitability Performance

**Performance Metrics ver. 1.0.6**

**Profitability** | Sales | Delivery | Inventory | Labor

Report Criteria

For Year:   By Customer    Product Class  Stock Code

By Product Class    Stock Code

Last Refresh Date

Purchased

Report Destination

Preview  Default Printer

10/10/2003 10:01 AM

Profitability Report for 2003			Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	YTD Totals					
Bayside Bikes	Sales	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %	Qtr %					
			Dollars	Ums	Dollars	Ums	Dollars	Ums	Dollars	Ums	Dollars	Ums	Dollars	Ums	Dollars	Ums	Dollars	Ums		
Bayside Accessories	Sales	0%	1,599	48	1,071	49	2,689	88	2,261	91	1,509	48	2,399	81	1,937	38	2,890	280	16,401	718
	Cost	0%	1,249	87%	1,249	88%	1,839	68%	1,379	61%	1,039	69%	1,919	80%	1,769	86%	1,969	85%	14,213	65%
	Margin	0%	350	22%	822	21%	850	31%	882	39%	470	31%	480	21%	1,670	22%	921	18%	2,188	13%
Bayside Helmets	Sales	0%	1,288	81	1,282	80	1,137	67	2,238	98	1,792	88	2,907	91	2,738	78	2,899	12	21,228	362
	Cost	0%	1,087	84%	1,088	84%	2,227	85%	1,852	82%	1,789	82%	1,672	82%	2,438	88%	2,278	85%	1,984	85%
	Margin	0%	201	16%	1,944	16%	1,000	13%	386	16%	1,003	18%	1,235	19%	1,261	12%	1,221	15%	9,444	44%
Garden Furniture	Sales	0%	15,490	67	17,779	74	11,387	66	16,997	65	16,110	68	14,449	61	15,112	65	16,139	62	16,721	68
	Cost	0%	12,949	84%	11,028	62%	11,775	84%	10,322	61%	10,112	62%	9,217	64%	7,997	53%	10,719	66%	9,726	58%
	Margin	0%	2,541	16%	6,751	38%	2,612	23%	6,675	39%	6,000	38%	5,232	32%	7,143	47%	5,420	33%	7,000	41%
Miscellaneous Bicycles	Sales	0%	3,289	12	11,027	38	10,122	32	10,322	32	10,189	32	8,420	32	9,188	32	10,249	32	6,822	32
	Cost	0%	3,199	97%	7,128	64%	6,887	68%	6,887	68%	6,800	68%	6,027	68%	6,806	68%	7,519	68%	6,414	68%
	Margin	0%	90	3%	3,899	35%	3,235	32%	3,505	34%	3,389	34%	2,393	28%	2,382	24%	2,730	26%	4,408	41%
Daying bicycles	Sales	0%	12,887	51	12,884	52	16,111	54	16,878	52	16,175	52	15,754	52	8,222	37	16,349	52	16,882	54
	Cost	0%	7,822	61%	8,028	62%	8,282	51%	8,278	51%	8,288	51%	8,278	51%	8,222	51%	12,228	74%	8,222	49%
	Margin	0%	5,065	39%	4,856	38%	7,829	49%	8,590	51%	7,897	49%	7,476	47%	7,532	47%	4,121	25%	8,660	51%
Specials	Sales	0%	0	0	0	0	16,791	7	0	0	0	0	0	0	0	16,452	7	16,791	7	
	Cost	0%	0	0	0	0	2,888	17%	0	0	0	0	0	0	0	14,604	88%	2,903	17%	
	Margin	0%	0	0	0	13,903	83%	0	0	0	0	0	0	0	0	2,148	12%	13,888	83%	
Bayside Bikes Final	Sales	0%	43,022	182	60,262	248	63,882	262	67,222	272	67,222	272	67,222	272	67,222	272	67,222	272	67,222	272
	Cost	0%	35,473	82%	31,428	52%	31,238	49%	30,711	46%	31,428	46%	30,800	45%	30,711	45%	30,711	45%	30,711	45%
	Margin	0%	7,549	18%	28,834	48%	32,644	51%	36,511	54%	35,800	52%	36,422	53%	36,511	53%	36,511	53%	36,511	53%

# Sales Performance

**Performance Metrics ver. 1.0.6**

Profitability | **Sales** | Delivery | Inventory | Labor

Report Criteria

By Salesperson

Details

Customer

Product Class

Stock Code

By Customer

Details

Product Class

Stock Code

By Product Class

Details

Stock Code

Last Refresh Date

10/10/2003 10:13 AM For Current Year: 2003 Refresh  Purchased

Report Destination

Preview  Default Printer Print Done

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**Sales Report for 2003**

		Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	YTD Totals
		Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty	Dollars Qty
<b>LISA FARMER</b>														
BEERHOUSE	By Yr	8,138	5,022	1,438	8,138	5,022	8,999	2,257	11,074	8,334	3,366	8,663	2,225	68,328
	Cur Yr	8,447	6,488	4,854	8,906	4,483	7,449	2,441	4,600	4,434				64,278
	Target	10,200	15,000	10,200	10,200	15,000	10,200	10,200	15,000	10,200	10,200	15,000	10,200	126,000
BOHEMIA DIST	By Yr	14,792	5,267	8,837	15,776	8,242	14,378	8,899	15,473	9,236	11,099	13,193	2,227	113,237
	Cur Yr	8,827	13,801	2,986	13,923	8,282	18,272	2,339						83,100
GLAZER'S DISTRIBUTORS OF	By Yr	13,448	11,797	11,337	12,887	13,289	13,222	10,879	14,209	12,810	14,819	10,122	16,822	114,338
	Cur Yr	20,228	13,322	12,376	12,822	12,848	13,822	16,217	13,812	17,827				137,873
METARONG IMPORTING INC.	By Yr	12,763	5,897	3,316	12,800	6,750	15,489	8,897	3,378					64,726
	Cur Yr													
OHIO VALLEY BEER	By Yr	6,343	11,440	4,256	8,173	8,690	16,823	2,840	4,728	12,767	13,422	16,892	1,268	83,128
	Cur Yr													74,648
	Target													
WORLD CLASS BEVERAGES	By Yr					8,600	7,300							16,900
	Cur Yr													
	Target													
Totals for Lisa Farmer	By Yr	45,743	32,077	32,897	43,299	34,739	49,322	33,776	45,772	41,897	45,742	33,752	35,227	493,233
	Cur Yr	34,293	48,732	24,822	32,653	35,618	38,600	38,276	28,822	42,238				273,826
	Target	50,200	60,200	40,200	43,200	60,200	42,000	42,000	60,200	42,000	42,000	60,200	42,000	526,000

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## Delivery Performance

**Performance Metrics ver. 1.0.6**

Profitability | Sales | **Delivery** | Inventory | Labor

Report Criteria

For Year:  For Period:

By Customer   
Details  
 Product Class  Stock Code  Invoice

By Warehouse   
Details  
 Product Class  Stock Code  Invoice

By Product Class   
Details  
 Stock Code  Invoice

By Stock Code   
Details  
 Invoice

By Invoice

Last Refresh Date  
 Refresh  Purchased

Report Destination  
 Preview  Default Printer

10/10/2003 10:15 AM

*Report is under construction.*

# Inventory Turns

**Performance Metrics ver. 1.0.6**

Profitability | Sales | Delivery | **Inventory** | Labor

Report Criteria

Average Inventory Dollar Cutoff:

By Product Class

Details

Stock Code

Warehouse

By Stock Code

Details

Warehouse

Last Refresh Date

Refresh  Purchased

Report Destination

Preview  Default Printer

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Inventory Turns

		Last 12 Months		Average Inventory	Prior Year 1		Prior Year 2		Prior Year 3	
		Movement	Turns		Movement	Ending Qty	Movement	Ending Qty	Movement	Ending Qty
<b>BA Bicycle Accessories</b>										
BC L100	Units	1,333	8	185	1,638	0	0	0	0	0
Bicycle Chain and Lock	Dollars	\$6,132		\$761	\$6,735		\$0	\$0		\$0
BC S100	Units	964	7	129	988	0	0	0	0	0
Bicycle Child Seat	Dollars	\$114,408		\$15,339	\$124,966		\$0	\$0		\$0
BP 100	Units	1,222	8	185	1,561	0	0	0	0	0
Bicycle Pump	Dollars	\$16,864		\$2,141	\$24,976		\$0	\$0		\$0
BS O100	Units	1,251	6	155	1,483	0	0	0	0	0
Bicycle Speed/Diameter	Dollars	\$11,524		\$1,428	\$14,970		\$0	\$0		\$0
<b>Totals For Bicycle Accessories</b>		<b>\$148,327</b>	<b>8</b>	<b>\$19,659</b>	<b>\$173,687</b>		<b>\$0</b>	<b>\$0</b>		<b>\$0</b>

## Labor Performance

The screenshot shows a software window titled "Performance Metrics ver. 1.0.6" with a blue title bar. The window has a tabbed interface with tabs for "Profitability", "Sales", "Delivery", "Inventory", and "Labor". The "Labor" tab is currently selected. The main content area is titled "Report Criteria" and contains several sections:

- Report Criteria:**
  - For Year: 2003 (dropdown)
  - For Period: (empty dropdown)
  - By Department (dropdown menu)
  - Details:  Employee  Job
  - By Workcenter (dropdown menu)
  - Details:  Employee  Job
  - By Employee (dropdown menu)
  - Details:  Job
  - By Job (dropdown menu)
  - By Stock Code (dropdown menu)
- Last Refresh Date:**
  - 07/04/2003 03:42 PM (text field)
  - Refresh (button)
  - Purchased (checkbox)
- Report Destination:**
  - Preview  Default Printer (radio buttons)
  - Print (button)
  - Done (button)

The status bar at the bottom right of the window displays the date and time: 10/10/2003 10:45 AM.

*Report is under construction.*