

**Improve seller performance and governance effectiveness via quoting analytics KPIs**

As a Sales Manager,

I want to:

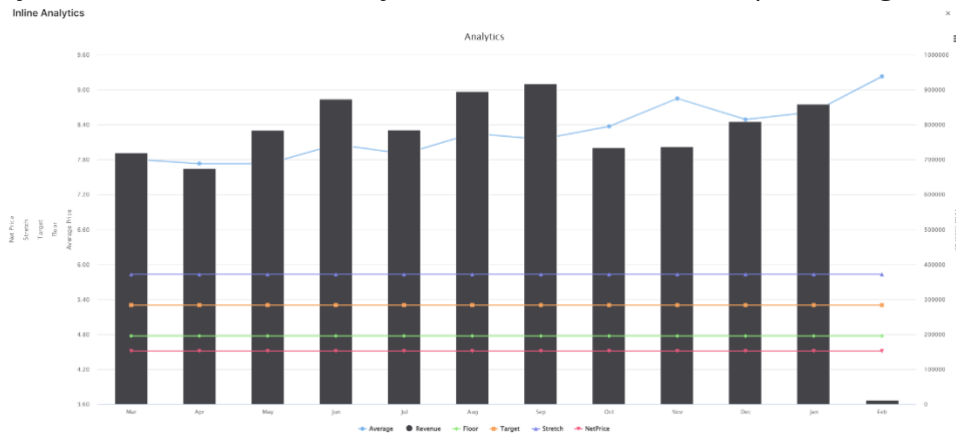
- provide to my team direct decisions support in the quote
- access real-time and robust Sales performance indicators to use as support for the regular checkpoints I have with my team,

so, I can:

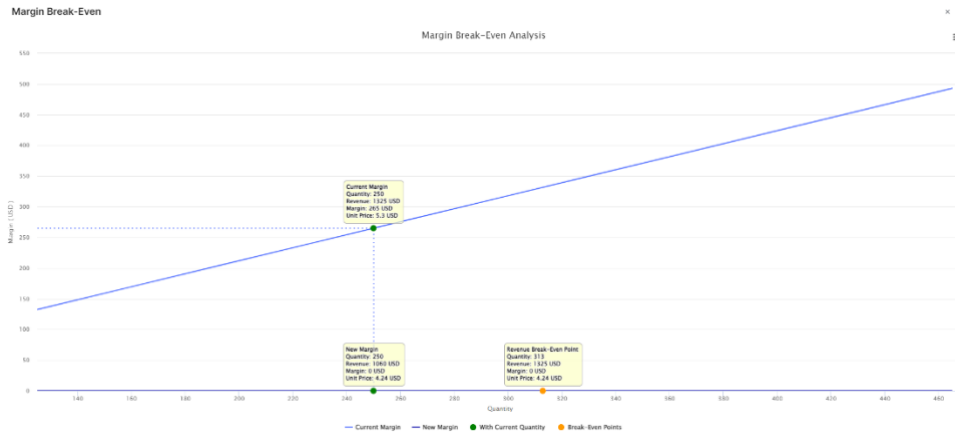
- Improve sales confidence, efficiency, and goal achievement
- Improve individual sales management coaching and performance visibility
- Get higher sales team retention and satisfaction
- Improve business contribution margin

**Functional Requirements**

- Ability to get Sales contextual decisions support from quotes inline analytics
  - Ability to view time series history of revenue over time compared to guardrails



- Ability to get benchmark analysis of quotes compared to recent past transactions versus guardrails
- Ability to get revenue and margin break-even analysis



- Ability to get a dashboard where up-to-date predefined governance and performance management metrics are collected
  - Ability to get context on in and out compliance deals

Quote	Product	Customer	Win / Loss	Sold Qty	Quoted Qty	Compliance	Price per Unit
Q-310	NC-0036	Yazaki	Win	165	500	33.00%	93.21
Q-320	NC-0001	Foxconn	Win	693	700	99.00%	44.99
Q-330	NC-0002	JAE	Win	484	500	96.80%	87.22
Q-340	NC-0014	Luxshare	Win	300	300	100.00%	61.53
Q-350	NC-0013	Hirose	Win	708	750	94.40%	53.22
Q-360	NC-0007	KD Fasteners	Win	311	350	88.86%	82.33
Q-370	NC-0008	Hellermann Tyton	Win	235	1000	23.50%	33.23

- Ability to combine compliance analysis with win/loss data



- Ability to switch level of granularity of the reporting using filters
  - The dashboard has the following filter options:

DATA FILTER

Customers

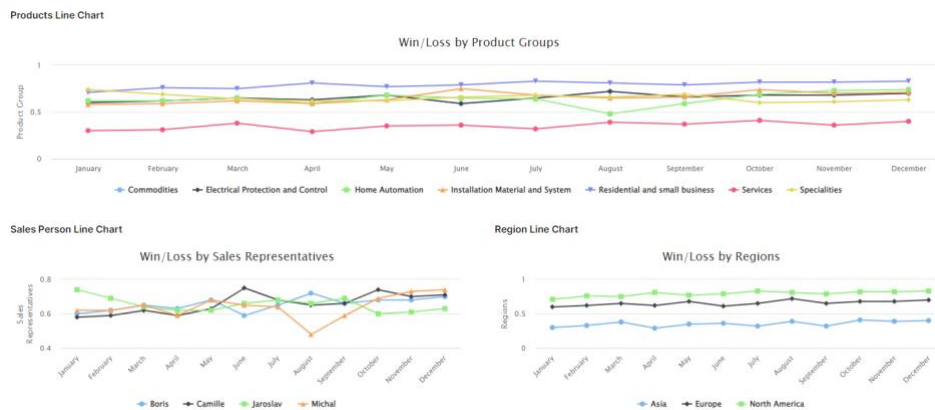
Products

WinLoss

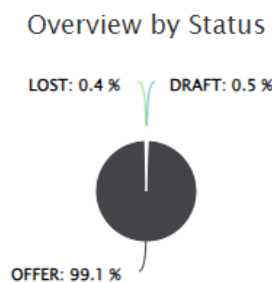
Year

Industry

- Ability to get a dashboard where up-to-date Win/loss metrics are collected
  - Ability to access win/loss ratio per multiple dimensions to compare performance per: Products Groups, Regions, or Sales representatives



- Overview by Status



- Ability to switch level of granularity of the reporting using filters
  - The dashboard has the following filter options:

DATA FILTER

Quote Status

Created By

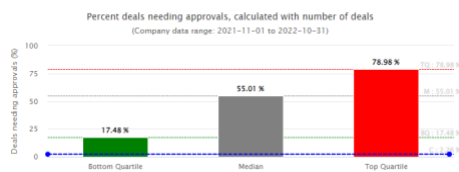
Customer

From

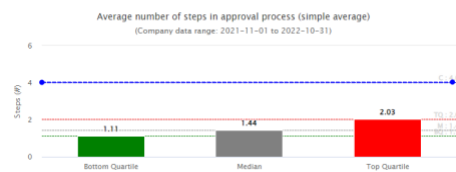
To

- Ability to get a dashboard where up to date KPIs and benchmarking metrics are collected
  - Ability to track percent of deals needing approvals and average number of steps in approval process compared to benchmarking, meaning an external dataset constituted of best-in-class customers

Percent Deals Needing Approval



Average Steps In Approval Process



- Ability to download portlets in various formats (PNG, PDF...)

## Non-Functional Requirements

- Automatically updated metrics in the dashboard
- Prerequisites Use cases:
  - Use case CHEM00
  - Use case CHEM09
  - Use case CHEM10
- Be able to store price guardrails history in the quote details in order to use them for quoting analytics KPI's

## Reporting and Dashboards (Not included in the baseline estimate)

- This use case has the dashboards and reports as described in the functional requirements section.

## Measures, Calculation and Decision-Making Key Performance Indicators

- **Win/loss percentage** = (Total deals won / Total opportunities) \* 100

## Solution Design

## Quotes Data - Quotes History - Guardrails History

By default, all quotes after creation are stored in the PriceFx Partition with every information and they are accessible both from User Interface and by Calculation Logics. That means we don't need to create a specific place to store their Data.

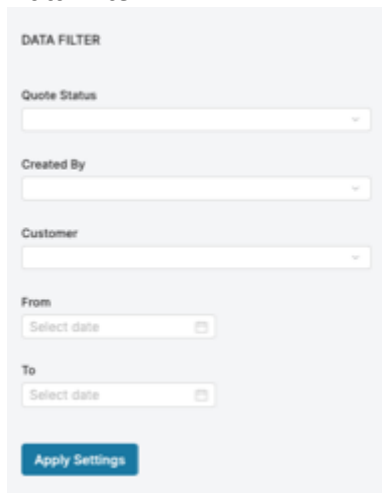
Exception will be If the combination of the amount of the quotes and the number of lines inside them will be too much to be handled from the queries needed to generate the analytics.

In that case we can store only the required Data to a separate table and then use it to show the results (Extra effort is needed)

## Win/Loss Data

We need to create a dashboard with a Data filter and 5 portlets.

### Data Filter



The screenshot shows a 'DATA FILTER' form with the following fields:

- Quote Status: A dropdown menu.
- Created By: A dropdown menu.
- Customer: A dropdown menu.
- From: A date picker with the text 'Select date' and a calendar icon.
- To: A date picker with the text 'Select date' and a calendar icon.
- Apply Settings: A blue button at the bottom.

Quote Status: Drop down with Hardcoded values **Offer, Deal, Lost, Draft**

Created By: Drop down list with Users

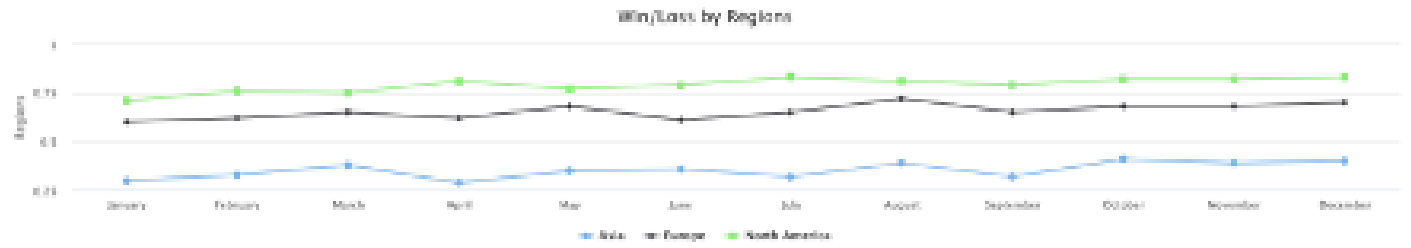
Customer: Drop down list with Customers

From: Date picker

To: Date picker

## Region Line Chart

### Region Line Chart



We need to create Header quote input to hold the Region of the Quote and can be stored also as Extra info 3 in the quotes overview table.

The Region input can be prepopulated with the ability to override. For auto filling the field we need to receive region of each customer so based on the customer selection on the quote we can pull the Region.

Then after querying all the existing quotes using the Data filter, we can group them By Region and Month and calculate the win/loss ratio

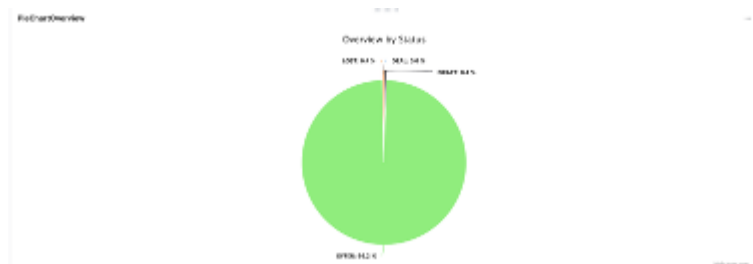
### Product Line Chart



Requirement is that we need to receive product data that contains the product group and use it as output in the quote line-item logic.

Then we need to query all the quote line items based on the Data filter and group them by product group and calculate the win/loss ratio

### Pie Chart Overview



We need to query all the quotes based on the Date filter and group them by the status

## Sales Person Line Chart

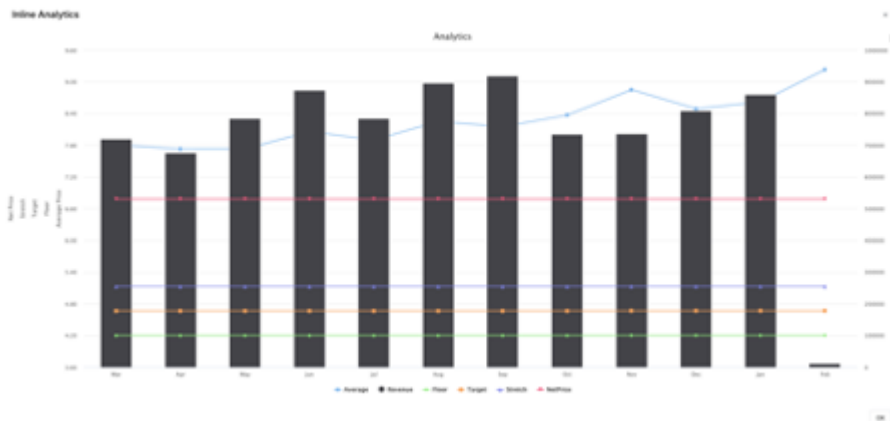


We need to create Header quote input to hold the Salesperson of the Quote and can be stored also as Attribute extension in the quotes overview table.

We can have a customer extension table to assign Salesperson to Customers, then based on the selected customer we can prepopulate the field with the ability to override.

Then after querying all the existing quotes based on the Data filter, we can the group them by Month and User to calculate the win/loss ratio

## Inline analytics - time series history of revenue



Requirement is that we need to have all the available Data in the Transactions Datamart

We need to query the Transactions Datamart and get the following Data

- Average: Average Net Price
- Revenue: Sum of Invoice Price

And group them by month

Then Combine

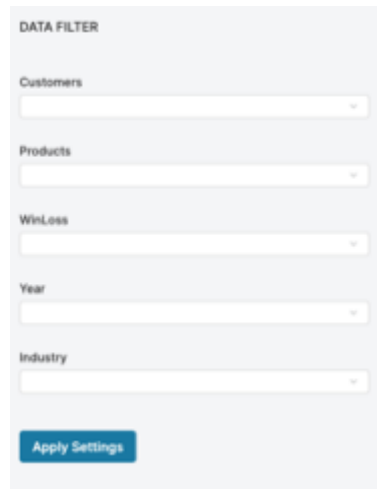
- Floor Price
- Stretch Price
- Target Price
- Invoice Price (From quote calculation)

## Sales compliance Dashboard

We need to create a dashboard with a Data Filter and 2 portlets.

The requirement is that we need to receive with the transactions data the quote reference ID in case the transactions are connected to a specific quote.

### Data Filter



The screenshot shows a 'DATA FILTER' form with the following fields:

- Customers: A white dropdown menu.
- Products: A white dropdown menu.
- WinLoss: A white dropdown menu.
- Year: A white dropdown menu.
- Industry: A white dropdown menu.
- Apply Settings: A blue button with white text.

Customers:Customer picker or a Restricted Drop-Down list with customers

Products:Product picker or a Restricted Drop-Down list with products

WinLoss:Drop down with hardcoded values "Win", "Loss"

Year:Date picker or restricted Drop-Down list

Industry:Drop-Down list

### Portlets

## Quote Compliance 1

Quote	Product	Customer	Win/Loss	Sold Qty	Quoted Qty	Compliance	Price per Unit
Q-148	HC-6095	Deery Auto Group	Loss	0	909	0%	33.23
Q-170	HC-6023	Magna International	Win	328	328	100%	29.42
Q-180	HC-6036	Stevens Brock Group	Loss	0	909	0%	38.44
Q-230	HC-6023	Nano	Win	341	330	103%	12.80
Q-239	HC-6030	Continental AG	Win	684	700	97%	11.43
Q-238	HC-6027	2P-RedStar/Arden AD	Win	387	508	77%	12.80
Q-249	HC-6033	Lear Corp	Win	693	900	77%	11.43
Q-259	HC-6029	Deery Auto Group	Win	316	608	52%	129.23
Q-268	HC-6034	T3 ConnectAbility	Win	347	808	43%	123.80
Q-270	HC-6029	Alphano	Loss	192	900	21%	134.80
Q-288	HC-6020	Midea Incorporated	Loss	217	1800	12%	128.23
Q-299	HC-6030	Espeki Convection Systems	Win	406	406	100%	89.52
Q-380	HC-6038	Takagi	Win	163	508	32%	93.27
Q-328	HC-6036	Freemont	Win	693	700	100%	44.80
Q-338	HC-6030	JAE	Win	494	508	97%	87.23
Q-348	HC-6034	Leachman	Win	300	338	89%	81.83
Q-358	HC-6035	Hitachi	Win	309	330	94%	59.23
Q-368	HC-6037	3D Facilities	Win	271	338	80%	102.23
Q-378	HC-6038	Anderson-Turner	Win	154	900	17%	139.91

For this portlet we need to query the transactions Datamart based on the provided Data Filter and get the sold quantities for all line that have a Quote Reference ID. Then we need to query the quote line items and find them inside the quote in order to get the details of the quote.

In the end we need to show the following details:

- Quote: Quote ID
- Product: Product
- Customer: Customer
- Win / loss: Display will or loss based on a threshold specified by customer.
- Sold Qty: Sold quantity (Based on the transactions)
- Quoted Qty: Quoted quantity (based on the quote)
- Compliance: The percentage of the quote fulfillment
- PricePerUnit: the agreed Unit Price

## Quote Compliance 2



Based on the above data we can also visually represent the information

<b>Input Data</b>
<p>The following tables can be either manually loaded in Pfx via Pfx Excel Client or can be automatically integrated using CSV files in a Pfx dedicated SFTP folder:</p> <ul style="list-style-type: none"> <li>• Basic Master Data (See CHEM00)</li> <li>• Quotes Data</li> <li>• Transactions Data</li> </ul>
<b>Out-of-scope business functions and features (Can be configured, but not included in the Chemical Industry Catalog)</b>
<ul style="list-style-type: none"> <li>• Any reporting other than the ones explicitly mentioned above</li> <li>• Any customization of reporting in scope</li> <li>• Additional reporting filters</li> <li>• User entitlement of the dashboard</li> <li>• Data Integration</li> <li>• Ability to set up Science based guardrails</li> <li>• Ability to set Guardrails based on business rules</li> </ul>
<b>Implementation Level of Effort</b>
2 sprints/1FTE CE
<b>Base Line Projected Annual Impact*</b>
<p>Direct Benefit = \$XK Per \$100M ARM  Indirect Benefit = \$X Per \$100M ARM</p>

Prescribed User Stories			
Use Story Name	I want to...	so I can ...	Acceptance criteria
<b>Epic: Inbound data</b>			
Quotes Data	Be able to access to Historical Quotes data	Use them for analytics purposes	<ul style="list-style-type: none"> <li>There is a place where historical quotes data (prior to Pricefx) are loaded and stored into Pricefx</li> <li>Quotes data set is accessible from analytics module</li> </ul>
Invoice line items or transactional data	Already covered by CHEM00 which is a prerequisite for all CHEM Use cases, and thus for CHEM11		
Guardrails	Already covered in CHEM09.		
<b>Epic: As a Sales Rep/Pricing Manager</b>			
Quotes History	Be able to store my quotes	Use them for analytics purposes	<ul style="list-style-type: none"> <li>Ability to store history of all the quotes line items, both the won and the lost ones <ul style="list-style-type: none"> <li>All new quotes managed/ created within Pricefx will be stored.</li> <li>The quotes history can come to enrich the existing Historical Quotes Data table where existing quotes data prior to Pricefx are stored if any. (See Quotes Data User story)</li> </ul> </li> <li>Quotes history data set is accessible from analytics module</li> </ul>
Guardrails History	Be able to store history of the price guardrails in the quote details	Use them for analytics purposes	<ul style="list-style-type: none"> <li>Ability to enrich quotes history with quotes details and quote line-item guardrails at the time of the quote</li> <li>It is a must for analytics requires guardrails data</li> </ul>
Win/Loss Data	Have access to Win Loss Data	use them throughout the application and especially to perform my Win/Loss analysis	<ul style="list-style-type: none"> <li>Ability to track win / loss deal at quote line-item level in the dashboard based on transactional data</li> <li>Ability to enrich Quotes history with quote details including the status: win or loss</li> </ul>
Inline analytics - time series history of revenue	Get Inline analytics - time series history of revenue	Give direct decisions support in the quote to my Sales team	<ul style="list-style-type: none"> <li>Ability to have inline analytics time series chart displaying history of revenue over time compared to guardrails for a specific line-item.</li> <li>The chart is based on a transactions data set. (We expect Transactions data set to be available based on "Invoice line items or transactional data" User story.)</li> <li>The following metrics are displayed: Floor, target, Stretch, net, and average prices.</li> <li>Floor, target and stretch prices are not historical ones, they were the actual guardrails within the context of the current open quote.</li> </ul>
Inline analytics – Benchmark analysis	Get Inline analytics – Benchmark analysis	Give direct decisions support in the quote to my Sales team	Already covered in CHEM09 which is a prerequisite for CHEM11.
Inline analytics - revenue and margin break-even analysis	Already covered by CHEM10 which is a prerequisite for CHEM11		
Sales compliance Dashboard	get insights on in and out compliance deals	Improve individual sales management coaching and performance visibility	<ul style="list-style-type: none"> <li>There is a portlet displaying a quote compliance overview on a table. The following quote information is available: Quote ID, Product, Customer, Win/loss Status, Sold Quantity, Quoted Quantity, Compliance rate, Price per unit.</li> </ul>

			<ul style="list-style-type: none"> <li>There is another portlet displaying similar compliance quote information combined with win/loss data in a scatter plot.</li> </ul>
Dashboard filter	Filter the scope of my quote compliance analysis	Focus on a scope	Fields to filter on are: <ul style="list-style-type: none"> <li>Customers</li> <li>Products</li> <li>Win/loss Status</li> <li>Year</li> <li>Industry</li> </ul>
Quote Win/Loss Metrics	Get better visibility on performance	Adjust sales management	<ul style="list-style-type: none"> <li>There are 3 portlets with Time series charts displaying win/loss ratio over time per multiple dimensions. <ul style="list-style-type: none"> <li>Each portlet is based on one dimension.</li> </ul> </li> <li>There is another portlet displaying a pie chart which gives an overview by Quote Status.</li> </ul>
Dashboard filter	Filter the scope of my quote win/loss analysis	Focus on a scope	Fields to filter on are: <ul style="list-style-type: none"> <li>Quote status</li> <li>Created By</li> <li>Customer</li> <li>From (date)</li> <li>To (date)</li> </ul>
Dashboard Generic filter	Use a generic filter	create an advanced filter with a complex query to filter the scope of my analysis	Generic filter option is enabled in both dashboards
Profit Dashboard	Already covered by CHEM00 which is a prerequisite for all CHEM Use cases, and thus for CHEM11		

**Scope Validation and Project Readiness Workshop – Validation Questions:**

Questions		Answers	
Q1	Do you have sales guardrails available? How are they set up?	A1	
Q2	How many Quotes we expect to have in a month?	A3	
Q3	How many items a Quote usually have ?	A4	
Q4		A5	
Q5		A6	
Q6		A7	
Q7		A8	
Q8		A9	
Q9		A10	
Q10		A11	
Q11		A12	
Q12		A13	
Q13		A14	