

ACTION DRIVEN BUSINESS INTELLIGENCE WITH POWER BI



Reuben Barry

We are
The Power People

We are
The NAV People

We are
The 365 People

THE DIGITAL POWER PRACTICE

apps & portals

internal users

canvas

model driven

Teams enhancements

external users

Custom PWAs

Customer Web App

Finance Pleaseze

ecommerce

ecommerce connectors

nH eComm

Shopify

eBay

Sana Commerce Cloud

Power BI

automation

analytics

reporting output

Power BI

data warehousing & infrastructure

Jet Reports

Azure SQL

Azure Analysis Services

Jet Analytics

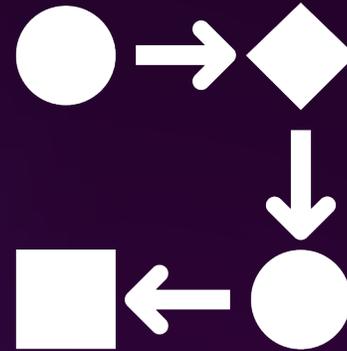
WHAT ARE WE TALKING ABOUT?



- **WHY? – ANALYTICS STRATEGY**
 - Evolving from reporting to intervention
- **WHAT? – POWER BI**
 - Real life use cases and demo
- **HOW? – DELIVER**
 - How you can engage with us to help
- **Q&A**

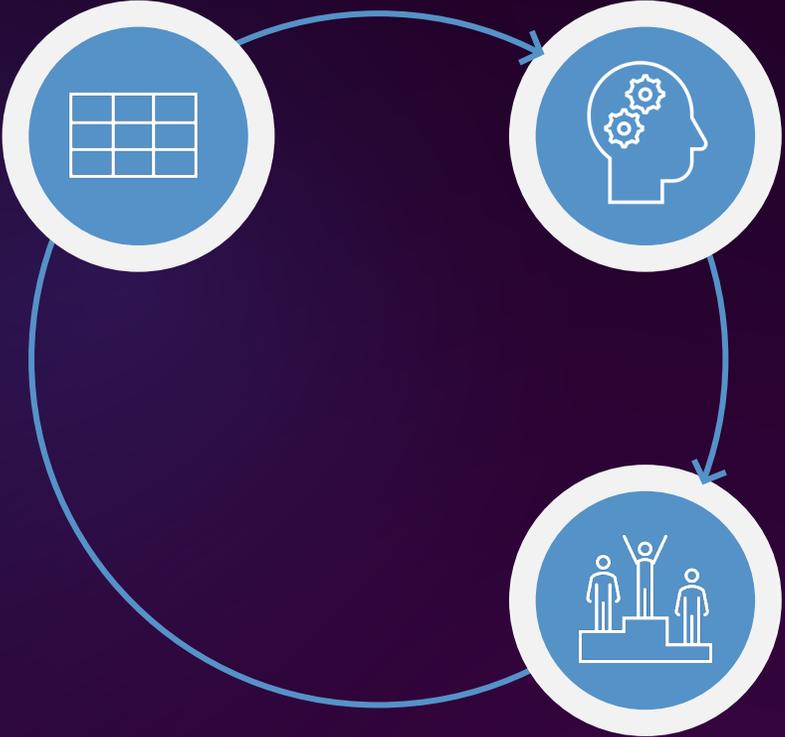
WHY?

ANALYTICS STRATEGY



EVOLVE BEYOND REPORTING

Move beyond
traditional reporting

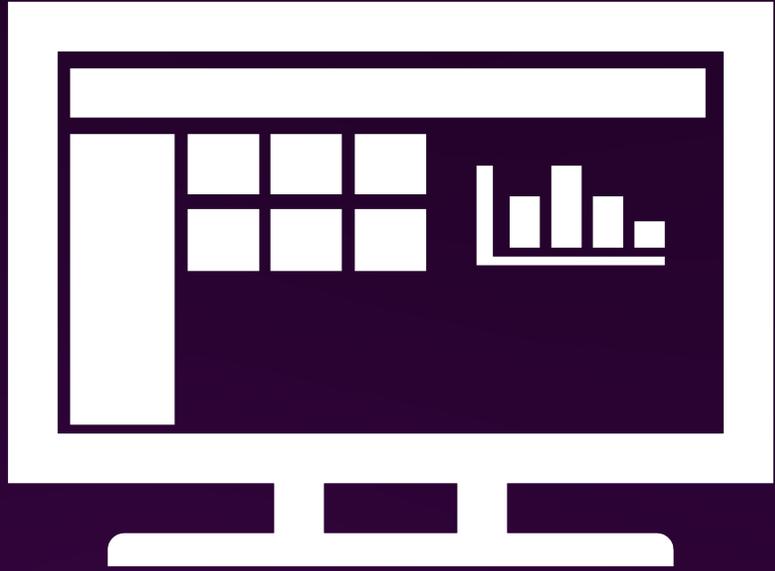


Into
discovery

Onto
intervention

WHAT?

POWER BI



WHAT IS POWER BI?



- Automated, live, interactive visualisation tool
- Distributed via browser or mobile app
- Integrates with Teams, SharePoint, Power Platform

- Eliminate manual reporting processes
 - Read-only consumption, no Excel spreadsheets to break!
- Combine data from multiple sources
 - Automate: deliver action-focussed interactive views **when it matters**
- Push data alerts and flows through Power Platform

WHY POWER BI?

ANALYTICS IN ACTION



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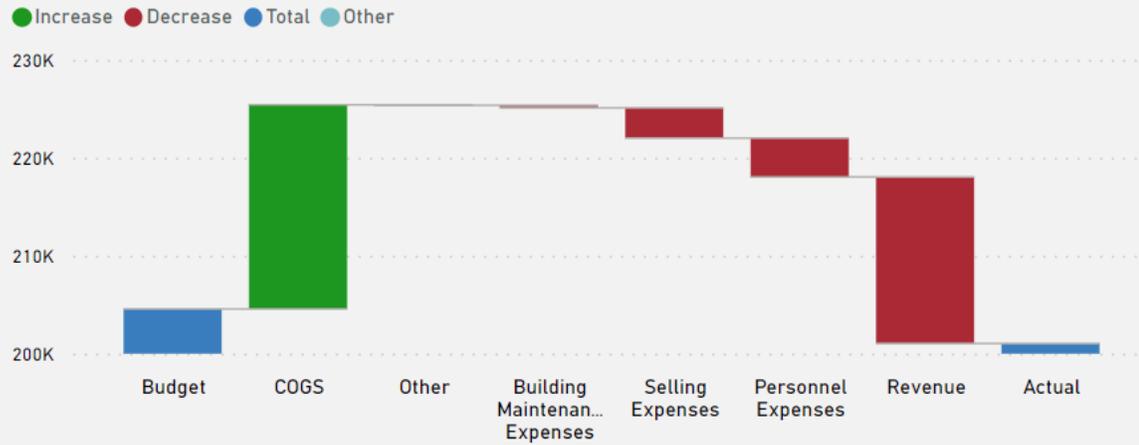
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<h2>521.78K</h2> <p>Gross Profit</p>	<h3>3,840</h3> <p>Var to Budget</p>
	<h3>7.4%</h3> <p>% Var to Budget</p>

<h2>41.7%</h2> <p>Gross Margin %</p>	<h3>41.4%</h3> <p>Budgeted Gross Margin %</p>
	<h3>0.31</h3> <p>%pt Var to Budget</p>

Variance to Budget by Account Category



Actual vs Budget by Customer Group



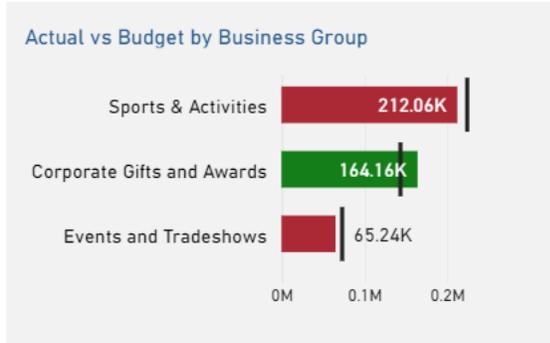
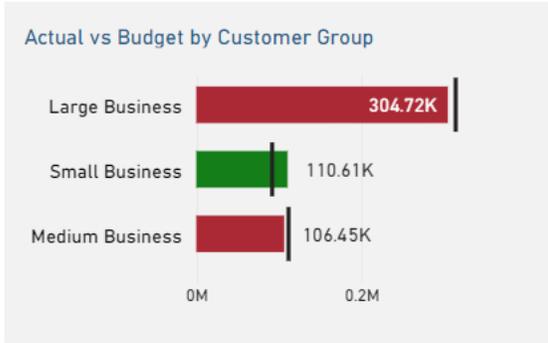
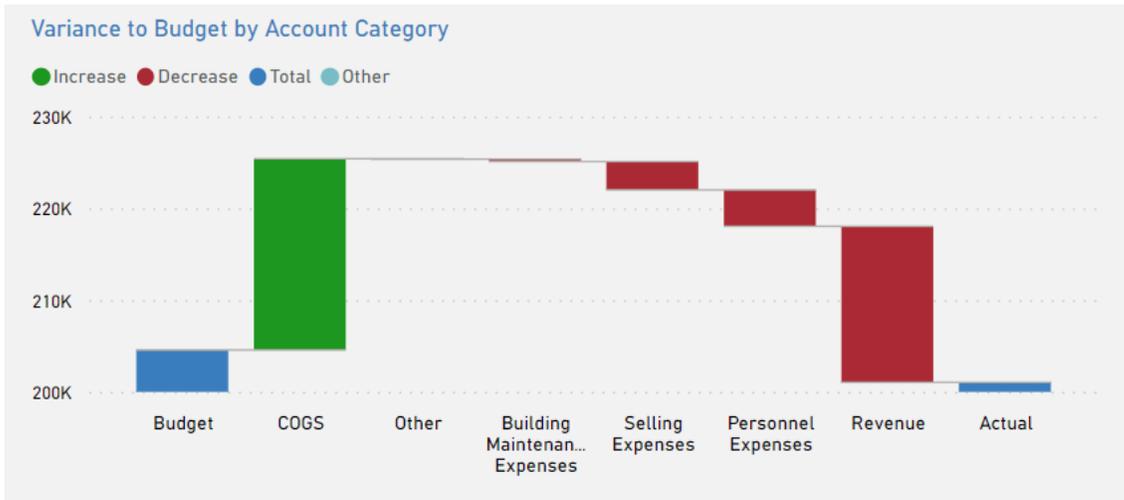
Actual vs Budget by Business Group



	Actual	Budget	Var to Budget	% Var to Budget
⊕ Sales of Retail	1,287,106	1,303,745	-16,639	-1.3%
⊕ Sales Discounts	-37,101	-36,734	-367	1.0%
Total Revenue	1,250,005	1,267,011	-17,006	-0.3%
⊕ Cost of Goods Sold	-728,222	-749,068	20,846	-2.8%
⊕ Cost Adjustments	-	-	-	-
Total Cost of Goods Sold	-728,222	-749,068	20,846	-2.8%
GROSS PROFIT	521,783	517,944	3,840	-3.1%
⊕ Selling Expenses	-80,319	-77,228	-3,092	4.0%
⊕ Personnel Expenses	-229,316	-225,353	-3,962	1.8%
⊕ Computer Expenses	-4,030	-3,913	-116	3.0%
⊕ Building Maintenance Expenses	-4,672	-4,411	-261	5.9%
⊕ Administrative Expenses	-2,405	-2,472	67	-2.7%
⊕ Depreciation of Fixed Assets	-	-	-	-
⊕ Other Operating Expenses	-	-	-	-
Operating Expenses	-320,742	-313,377	-7,365	12.0%
OPERATING PROFIT	201,042	204,567	-3,525	8.9%
⊕ Interest Income	-	-	-	-
⊕ Interest Expenses	-	-	-	-
⊕ FX Gains and Losses	-	-	-	-
PBT	201,042	204,567	-3,525	8.9%
⊕ Income Taxes	-	-	-	-
NET PROFIT	201,042	204,567	-3,525	8.9%

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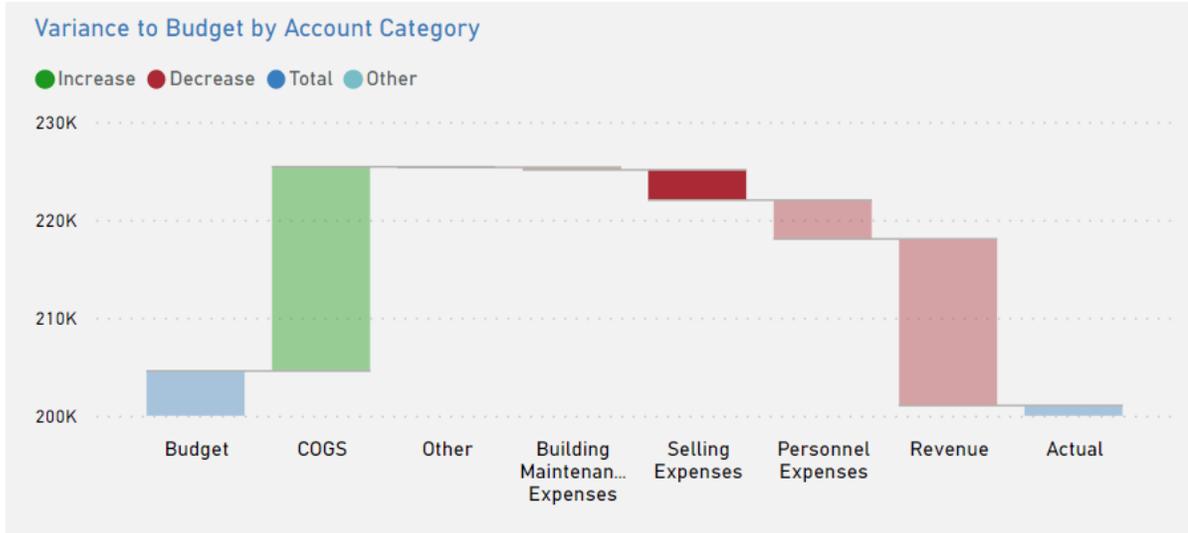
Filters on all pages

- Account Category is (All)
- Account Sub Category is (All)
- GL Account is (All)
- Business Group is (All)
- Customer Group is (All)
- Document Type is (All)
- Document No is (All)
- User is (All)

(Blank) Gross Profit	(Blank) Var to Budget
	(Blank) % Var to Budget

(Blank) Gross Margin %	(Blank) Budgeted Gross Margin %
	(Blank) %pt Var to Budget

	Actual	Budget	Var to Budget	% Var to Budget
GROSS PROFIT	-	-	-	-
☐ Selling Expenses	-80,319	-77,228	-3,092	4.0%
61100 - Advertising	-8,502	-8,465	-37	0.4%
61150 - Outsourced Marketing	-39,272	-38,075	-1,197	3.1%
61200 - Entertainment and PR	-2,918	-2,703	-215	7.9%
61250 - Sales Promotions	-8,261	-7,607	-654	8.6%
61300 - Travel	-	-	-	-
61350 - Events	-276	-253	-22	8.7%
61360 - Delivery & Shipping	-21,092	-20,125	-967	4.8%



P & L Detail

Financial Period

2018 (Year) + 2018 Q1 (Quarter) + 2018 Feb (Month) ▼

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Filters

G/L Postings by Day



[Go Back](#)

Date	Document Type	Document No	Account	Posting Description	Business Group	Customer Group	Amount
02/02/2018	Invoice	G106941	61200 - Entertainment and PR	Entertainment, SALES February 18	Events and Tradeshows		-67
03/02/2018	Invoice	G103305	61200 - Entertainment and PR	Entertainment, SALES February 18	Sports & Activities		-42
04/02/2018	Invoice	G102948	61200 - Entertainment and PR	Entertainment, SALES February 18	Corporate Gifts and Awards		-10
04/02/2018	Invoice	G103650	61100 - Advertising	Radio Advertising, Corporation for Public Broadcas	Events and Tradeshows		-59
04/02/2018	Invoice	G103995	61100 - Advertising	Print Advertising, NewCaSup February 18	Corporate Gifts and Awards		-88
04/02/2018	Invoice	G105484	61360 - Delivery & Shipping	Delivery & Shipping, February 18	Corporate Gifts and Awards		-338
04/02/2018	Invoice	G105496	61360 - Delivery & Shipping	Delivery & Shipping, February 18	Sports & Activities		-1,445
04/02/2018	Invoice	G106953	61200 - Entertainment and PR	Entertainment, EXEC February 18	Events and Tradeshows		-90
05/02/2018	Invoice	G103662	61200 - Entertainment and PR	Entertainment, SALES February 18	Events and Tradeshows		-14
05/02/2018	Invoice	G105508	61360 - Delivery & Shipping	Delivery & Shipping, February 18	Events and Tradeshows		-519
06/02/2018	Invoice	G103686	61200 - Entertainment and PR	Entertainment, ADM February 18	Events and Tradeshows		-10
06/02/2018	Invoice	G104757	61200 - Entertainment and PR	Entertainment, ADM February 18	Events and Tradeshows		-61
06/02/2018	Invoice	G106185	61200 - Entertainment and PR	Entertainment, SALES February 18	Corporate Gifts and Awards		-129
07/02/2018	Invoice	G103269	61150 - Outsourced Marketing	Marketing Campaign Generation, Lion Marketing Febr	Sports & Activities		-1,918
07/02/2018	Invoice	G107805	61200 - Entertainment and PR	Entertainment, ADM February 18	Sports & Activities		-330
08/02/2018	Invoice	G104043	61200 - Entertainment and PR	Entertainment, ADM February 18	Corporate Gifts and Awards		-6
08/02/2018	Invoice	G104352	61100 - Advertising	Print Advertising, NewCaSup February 18	Sports & Activities		-1,530
09/02/2018	Invoice	G103317	61200 - Entertainment and PR	Entertainment, EXEC February 18	Sports & Activities		-54
09/02/2018	Invoice	G107361	61200 - Entertainment and PR	Entertainment, SALES February 18	Corporate Gifts and Awards		-89
Total							-80,319





Planned Production

63

Product Shortfall

9

Customer Shortfall

80.0%

% Shortfall Orders

26.2%

% Shortfall Products

33.5%

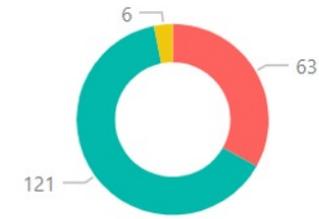
% Shortfall Qty

Production Progress Through Plan



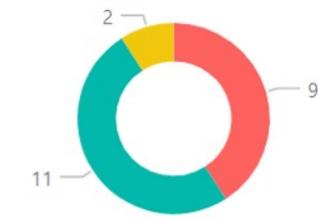
Product Count by Risk

● Shortfall ● Low Risk ● Attention



Customer Count by Risk

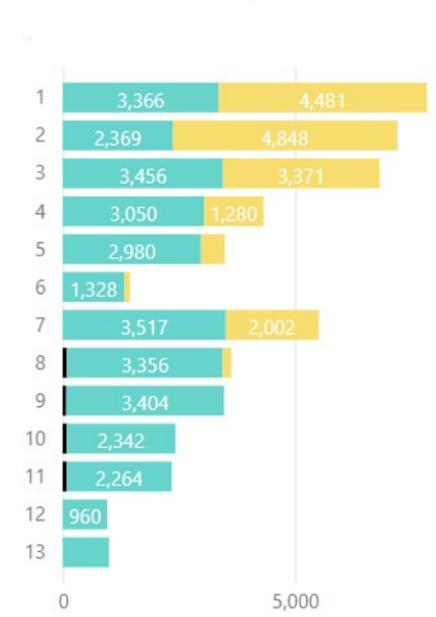
● Shortfall ● Low Risk ● Attention



Planning Shortfall by Customer Groups

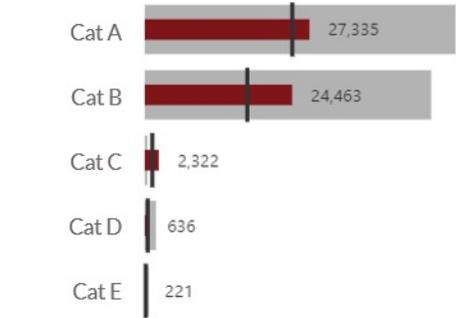
Customer Group	No of Orders	Shortfall Orders	% Shortfall Orders	No of Products	% Shortfall Products	Actual Order Qty	% Shortfall Qty
Customer	15	15	100.0%	7	71.4%	10,080	83.4%
Customer	5	5	100.0%	11	18.2%	767	19.6%
Customer	8	8	100.0%	21	52.4%	327	50.2%
Customer	7	7	100.0%	43	23.3%	12,369	15.9%
Customer	17	16	94.1%	12	50.0%	7,708	50.1%
Customer	19	10	52.6%	29	17.2%	18,764	19.9%
Customer	4	2	50.0%	14	7.1%	1,639	4.4%
Customer	3	1	33.3%	13	7.7%	1,610	3.1%
Customer	5	1	20.0%	9	11.1%	1,383	0.3%
Customer	1	0	0.0%	12	0.0%	130	0.0%
Customer	1	0	0.0%	1	0.0%	200	0.0%
Total	85	65	76.5%	163	25.8%	54,977	33.5%

Production Plan by Sequence



Demand vs Quantity A ↑ ↓ ↕ ↕ ↕ ↕ ↕ ↕ ↕ ↕ ↕ ...

● Actual Order Qty ● Qty Available | Forecast Qty



Product Plan for Today

Product Line	Fulfilment Risk	Opening Stock Qty	Planned Production Qty	Forecast Order Qty	Actual Order Qty	Plan Variance	Headroom %	Actual Produced Qty	Progress %	Actual Despatched Qty	Despatched %
Product category A	◆	18,234	33,392	24,501	27,335	24,291	47.1%	8,540	25.6%	363	1.3%
Product category B	◆	30,741	16,806	17,026	24,463	23,084	48.5%	8,708	51.8%	628	2.6%
Product category C	◆	432	0	1,246	2,322	-1,890	-437.5%	0	0.0%	0	0.0%
Product category D	◆	1,844	0	482	636	1,208	65.5%	365	0.0%	12	1.9%
Product category E	◆	341	338	164	221	458	67.5%	0	0.0%	124	56.1%
Total		51,592	50,536	43,419	54,977			17,613	34.9%	1,127	2.0%



Planned Production

63

Product Shortfall

9

Customer Shortfall

100.0%

% Shortfall Orders

100.0%

% Shortfall Products

100.0%

% Shortfall Qty

Production Progress Through Plan



Planning Shortfall by Customer Groups

Customer Group	No of Orders	Shortfall Orders	% Shortfall Orders	No of Products	% Shortfall Products	Actual Order Qty	% Shortfall Qty
Customer	15	15	100.0%	5	100.0%	8,406	100.0%
Customer	10	10	100.0%	5	100.0%	3,742	100.0%
Customer	5	5	100.0%	2	100.0%	150	100.0%
Customer	8	8	100.0%	11	100.0%	164	100.0%
Customer	1	1	100.0%	1	100.0%	4	100.0%
Customer	16	16	100.0%	6	100.0%	3,863	100.0%
Customer	7	7	100.0%	10	100.0%	1,967	100.0%
Customer	1	1	100.0%	1	100.0%	50	100.0%
Customer	2	2	100.0%	1	100.0%	72	100.0%
Customer	65	65	100.0%	42	100.0%	18,418	100.0%

Production Plan by Sequence



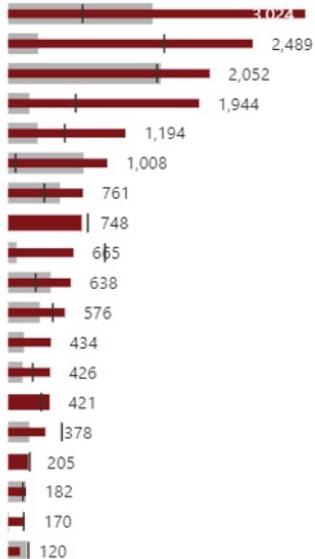
Product Count by R ...Customer Count by Risk

● Shortfall ● Low Risk ● Attention ● Shortfall



Demand vs Quantity Available by Product

● Actual Order Qty ● Qty Available | Forecast Qty



Product Plan for Today

Product Line	Fulfilment Risk	Opening Stock Qty	Planned Production Qty	Forecast Order Qty	Actual Order Qty	Plan Variance	Headroom %	Actual Produced Qty	Progress %	Actual Despatched Qty	Despatched %
Product category		1,537	2,268	8,529	9,712	-155.2%		3,377	148.9%	0	0.0%
Product sub category		1,215	2,268	8,075	9,136	-162.3%		3,031	133.6%	0	0.0%
Product	◆	306	0	1,589	2,489	-2,183	-713.4%	1,813		0	0.0%
Product	◆	54	1,500	1,516	2,052	-498	-32.0%	0	0.0%	0	0.0%
Product	◆	1	768	74	1,008	-239	-31.1%	0	0.0%	0	0.0%
Product	◆	0	0	812	748	-812	-100.0%	0		0	0.0%
Product	◆	86	0	986	665	-900	-1046.5%	1,200		0	0.0%
Product	◆	161	0		434	-273	-169.6%	0		0	0.0%
Product	◆	147	0	251	426	-279	-189.8%	0		0	0.0%
Product	◆	0	0	338	421	-421	-100.0%	0		0	0.0%
Product	◆	179	0	150	182	-3	-1.7%	0		0	0.0%
Product	◆	8	0	159	170	-162	-2025.0%	0		0	0.0%
Product	◆	190	0	207	120	-17	-8.9%	0		0	0.0%
Total		4,755	2,385	12,566	18,418			4,046	169.6%	88	0.5%

Client Segmentation

Last Data Refresh

03/02/21 16:13



Select Financial Year: 2017 2018 2019 2020 2021

Production written off against

330,663 nil fee Parent
356,065 nil fee Client
1,463,169 nil fee Invoice

Active Client Counts

939 Parent Client
1,453 Client

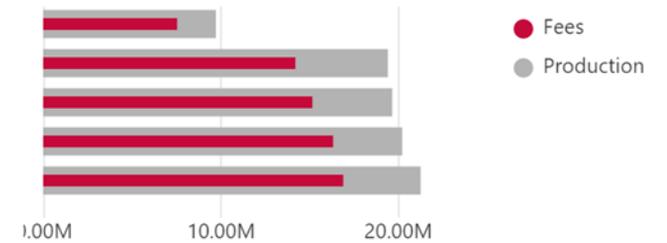
Fee Bin	Number of Parents	Fees	Recovery
90k+	36	5,994,418	78%
50k+	44	3,062,631	75%
25k+	76	2,696,962	77%
10k+	99	1,625,059	78%
5k+	75	533,748	75%
>0	320	615,288	50%
<=0	289	-301,771	-192%
Total	939	14,226,334	73%

Recovery Bin	Number of Parents	Fees
80%+	306	6,367,043
75%+	47	1,716,324
70%+	64	2,477,768
65%+	35	1,458,154
60%+	32	783,406
<60%	455	1,423,640
Total	939	14,226,334

Parent Name - Code	Production	Fees	Recovery
Parent Client 4182	603,591	441,525	73%
Parent Client 4210	349,500	311,379	89%
Parent Client 2620	299,594	259,134	86%
Parent Client 2737	317,791	250,902	79%
Parent Client 2666	305,896	243,974	80%
Parent Client 47	162,030	232,372	143%
Parent Client 1942	202,731	225,475	111%
Parent Client 4185	322,524	217,327	67%
Parent Client 4099	247,475	212,162	86%
Parent Client 4184	271,962	193,283	71%
Parent Client 539	364,881	191,829	53%
Parent Client 4120	210,709	173,426	82%
Total	19,445,225	14,226,334	73%

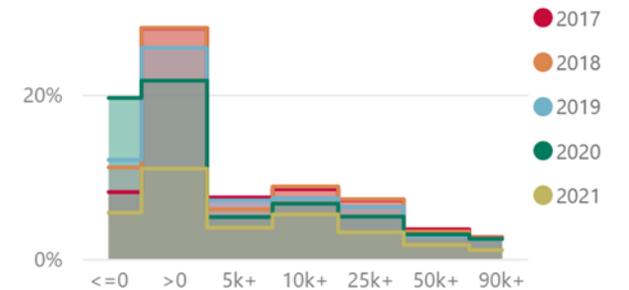
Portfolio Tracking

Financial Year	Production	Fees	Recovery
2021	9,744,932	7,554,582	78%
2020	19,445,225	14,226,334	73%
2019	19,694,092	15,188,357	77%
2018	20,258,083	16,357,607	81%
2017	21,299,611	16,929,326	79%
Total	90,441,943	70,256,206	78%



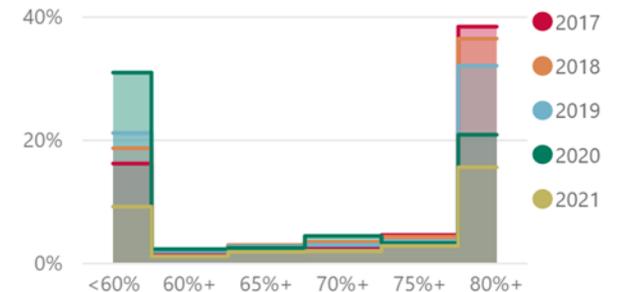
Distribution of Parent Clients over Fee Bins

Fee Bin	2017	2018	2019	2020	2021
90k+	39	38	35	36	16
50k+	53	49	41	44	25
25k+	106	107	93	76	48
10k+	125	130	109	99	80
5k+	110	89	105	75	56
>0	414	415	379	320	162
<=0	120	164	178	289	83
Total	967	992	940	939	470



Distribution of Parent Clients over Recovery Bins

Recovery Bin	2017	2018	2019	2020	2021
80%+	565	536	471	306	228
75%+	66	62	51	47	40
70%+	38	49	42	64	27
65%+	38	42	39	35	26
60%+	23	29	27	32	15
<60%	237	274	310	455	134
Total	967	992	940	939	470



Client Segmentation

Last Data Refresh

03/02/21 16:13



Select Financial Year: 2017 2018 2019 2020 2021

Production written off against

0 nil fee Parent 0 nil fee Client 0 nil fee Invoice

Active Client Counts

2 Parent Client 6 Client

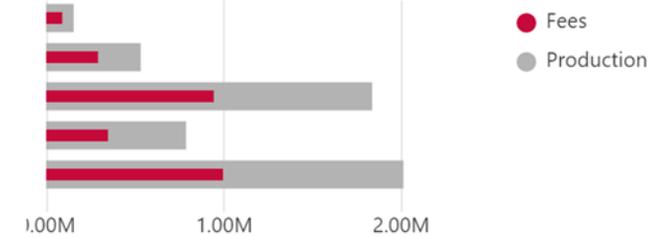
Fee Bin	Number of Parents	Fees	Recovery
90k+	2	291,988	55%
Total	2	291,988	55%

Recovery Bin	Number of Parents	Fees
<60%	2	291,988
Total	2	291,988

Parent Name - Code	Production	Fees	Recovery
Parent Client 539	364,881	191,829	53%
Parent Client 79	168,381	100,158	59%
Total	533,262	291,988	55%

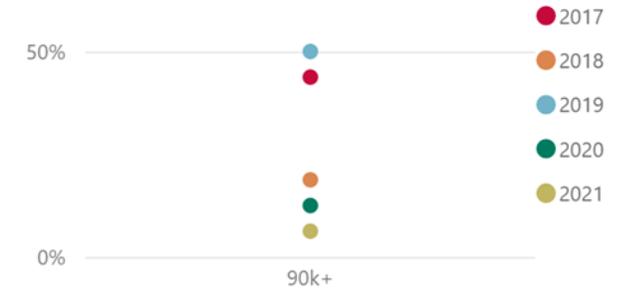
Portfolio Tracking

Financial Year	Production	Fees	Recovery
2021	155,434	90,290	58%
2020	533,262	291,988	55%
2019	1,839,060	945,369	51%
2018	789,352	348,514	44%
2017	2,015,379	997,668	50%
Total	7,135,004	3,901,655	55%



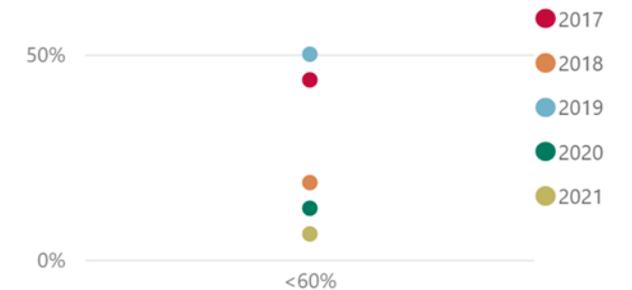
Distribution of Parent Clients over Fee Bins

Fee Bin	2017	2018	2019	2020	2021
90k+	7	3	8	2	1
Total	7	3	8	2	1



Distribution of Parent Clients over Recovery Bins

Recovery Bin	2017	2018	2019	2020	2021
<60%	7	3	8	2	1
Total	7	3	8	2	1



Job Analysis

Date

01/07/2019

30/06/2020



Fees billed have been apportioned to individuals based on their production and the invoice recovery rate.

Last Data Refresh

03/02/21 16:13



320,411
Production Recorded

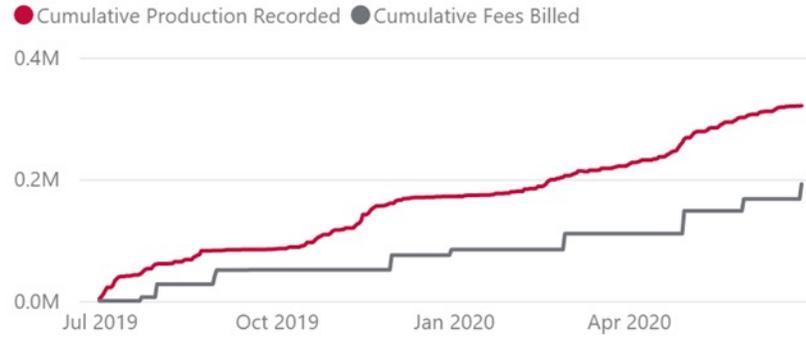
4,473
Production Recorded Unbilled

364,881
Production Written to Bills

191,829
Fees Billed

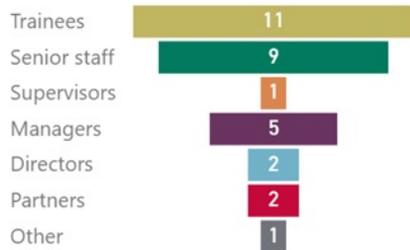
53%
Recovery

Cumulative Production Recorded and Fees Billed

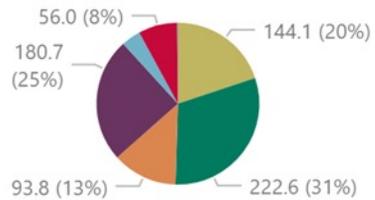


Number of Staff Involved

31



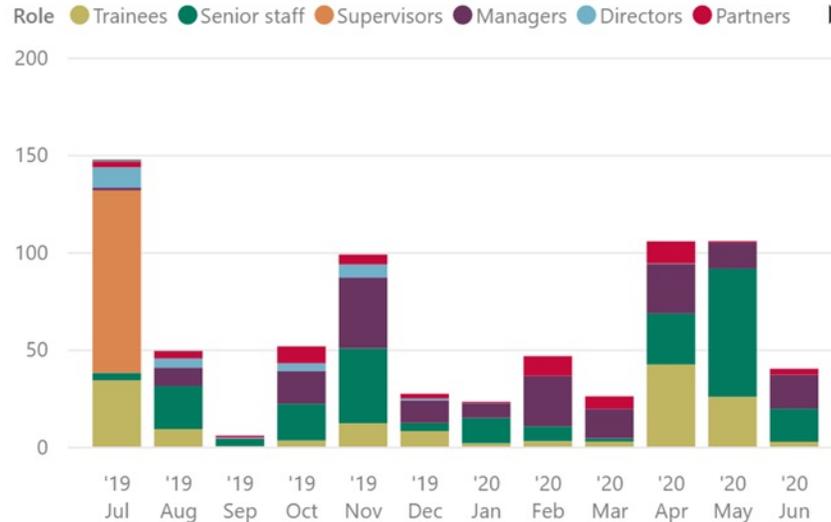
Chargeable Hours Recorded



Chargeable Hours Recorded in Period by:

Role

Employee



?

Parent Name - Code	Production Recorded	Production Recorded Unbilled	Production Written to Bills	Fees Billed	Recovery
Parent Client 539	320,411	4,473	364,881	191,829	53%
Total	320,411	4,473	364,881	191,829	53%

?

Staff Department	Production Recorded	Production Recorded Unbilled	Production Written to Bills	Fees Billed	Recovery
Dept A	233,373	1,946	97,738	27,334	28%
Dept C	3,002		-2,822	348	-12%
Dept D	84,035	3,818	46,838	5,019	11%
Trainees	1,513		1,211	0	0%
Senior staff	609		285	206	72%
Managers	57,723	3,371	30,460	867	3%
Directors	587		251	181	72%
Partners	21,922	447	13,285	626	5%
Other	1,682		1,346	3,140	233%
Other		-1,291	223,127	159,128	71%
Total	320,411	4,473	364,881	191,829	53%

HOW?

DELIVER



DEFINE OUTCOMES – LENSES

- **What outcomes?** e.g.
 - maximise staff utilisation
 - prevent loss of perishable stock
 - ensure order fulfilment OTIF
 - maximise gross profit margin
- We provide the **lenses** to focus on these outcomes
- In crafting each lens, we
 - identify the actionable **outcomes**
 - evaluate the **data** sources needed to support them
 - surface them to deliver the **insight** required

EXPLORE

- “Day In The Life”
- Detailed scoping, capturing requirements, outcomes, LENSES
- Explore data sources
- Document data model plan and intended design
- Playback

BUILD

- Plan approved – build it!
- Minimum viable product
- All of scoped requirements
- UAT, validation and delivery

FIT & FINISH

- “Wouldn’t it be great if...”
- Tweaks, changes, additions
- Ongoing iterations
- Training and support

QUESTIONS?

REUBEN BARRY – PRACTICE LEAD
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**DON'T FORGET
TO RATE THIS
SESSION IN THE
USER DAY APP**

