



Power BI

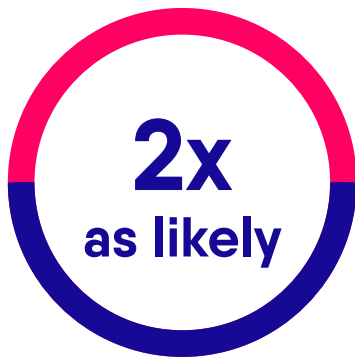
THE DASHBOARDS CFOs CAN'T LIVE WITHOUT

CLARK SCHAEFER HACKETT

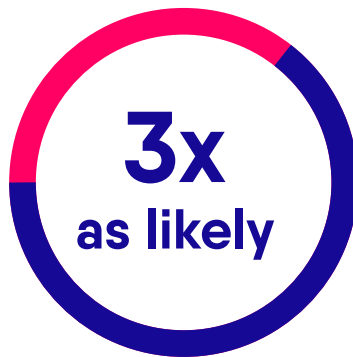
Data visualization is vital for financial & business leaders.

Organizations with real-time data visualization can quickly obtain critical information 78% of the time, according to recent studies. That's 22% more often than organizations without it.

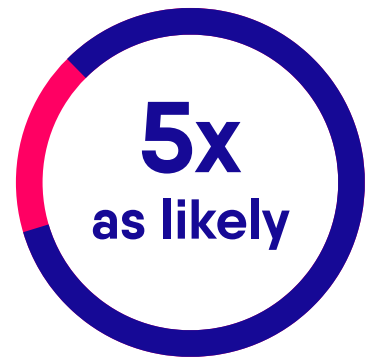
Strong data visualization capabilities make companies:



to use data when making decisions



to execute decisions



to make decisions faster than peers



Three questions visual dashboards can help answer in real time.

How do I predict future business conditions?

Visualization tools can help CFOs view emerging economic trends and how they should shape revenues, profitability, and operating expenses in response.

For instance, CFOs can view the impacts that anticipated job growth and other forms of economic expansion are expected to have on their own companies. This includes hiring, contractor costs, and supply chain activities. Moreover, finance chiefs can use heat maps and other visualization tools to see how market trends are expected to impact both revenue growth for their companies as well as costs.

How do I move quickly to identify and mitigate risk?

CFOs can rely upon visualization tools to identify top risks facing their organizations, as well as different layers of risk and how they can affect revenues, profitability, and other economic outputs.

For example, the CFO for a retail bank can use visualization tools to view the potential risks facing the performance of its loan portfolio, including the likelihood of customer defaults, anticipated changes in credit costs, and other factors.

How do I reduce costs through tighter inventory control?

CFOs can use visualization techniques to obtain clearer pictures of the demand for their products and services.

For example, the CFO of an electronics retailer can use visualization tools to anticipate how many new smartphones or tablets to stock when new products hit the market.

Alternatively, a CFO for an automaker can use visualization tools to better anticipate the numbers and models of vehicles to make available in different geographies or dealerships based on sales volumes and anticipated demand. More effective inventory management can help CFOs better utilize warehouse space, reduce markdowns, and increase profitability.



**THE
DASHBOARDS
CFOs CAN'T
LIVE WITHOUT**

1

**Profit & Loss
Dashboard**

2

**Cash Flow
Dashboard**

3

**Profitability Analysis
Dashboard**

4

**Spending Analysis
Dashboard**

5

**Procurement Analysis
Dashboard**

6

**Opportunity
Dashboard**

7

**Sales & Marketing
Dashboard**

#1 Profit & Loss Dashboard

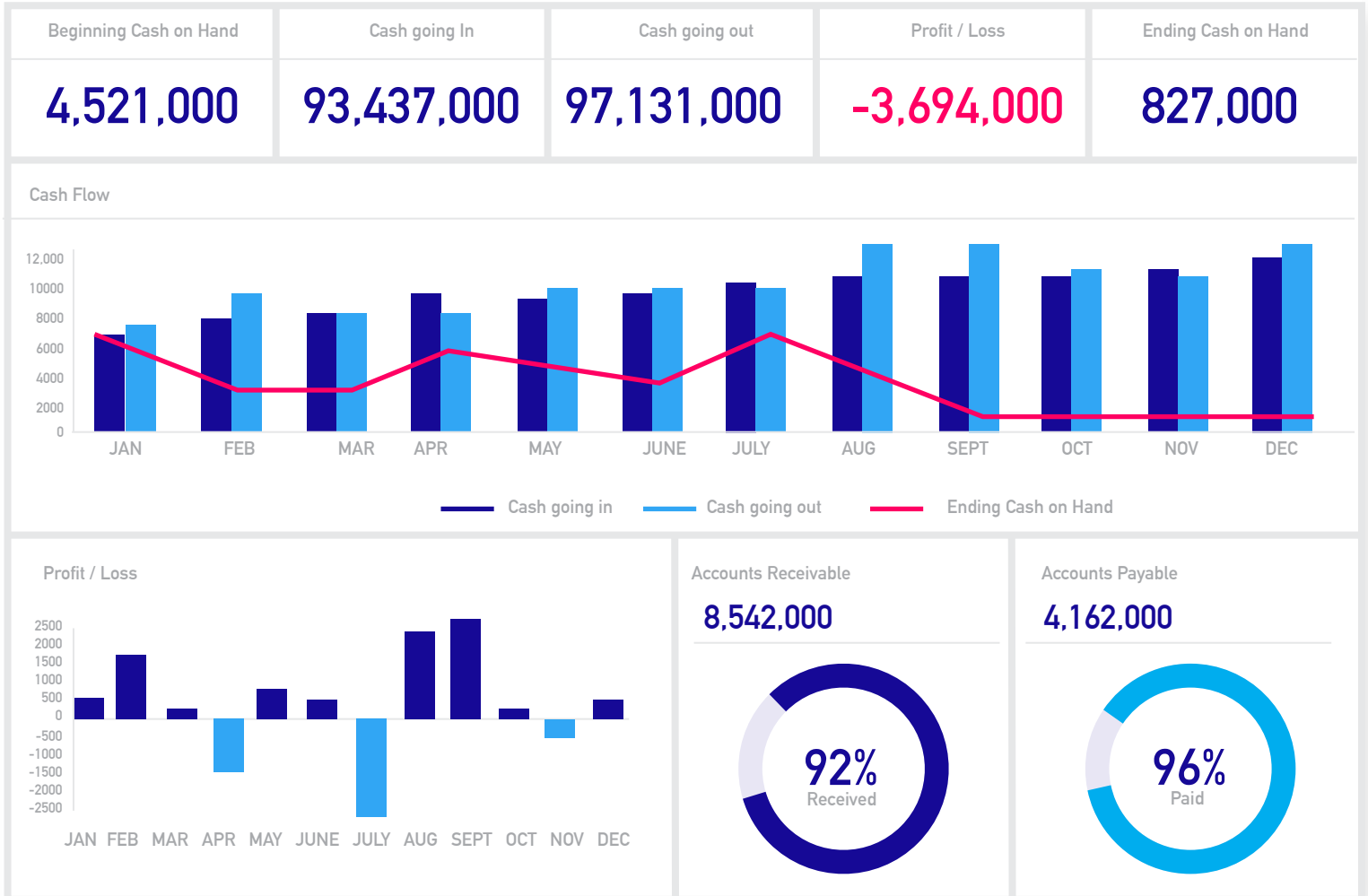


Know where you stand at all times and manage the future direction of your business.

The profit & loss dashboard helps CFOs answer important questions: Will we meet our profit targets for the next quarter? Do we have the cash flow to fund our expansion plans over the next year? Can we pay dividends at year-end?

- Monitor changes in revenues, operating costs, R&D spending, and net earnings over time.
- View and compare performance in real time over any given period.
- Capitalize on opportunities and improve weaknesses by gleaning insights from your performance.
- Monitor key performance indicators.

#2 Cash Flow Dashboard



Ensure liquidity and reduce risk.

Having timely and accurate data allows CFOs to project their own realities in light of rapidly changing industry trends and make more informed decisions.

- Pinpoint cash inflows and outflows.
- Inform cash budget requirements at specified periods of time.
- Reveal areas of improvement for better financial positioning and prioritize important activities.
- Provide information about investments and cash transactions that take place during the year.
- Help evaluate the financial structure of the business.

#3 Profitability Analysis Dashboard



Focus on the most profitable customers and products.

Assign costs and revenues to different products and customers to better identify the more profitable ones.

- Identify the most profitable customers and implement retention and loyalty programs that result in higher customer satisfaction.
- Analyze key revenue and cost drivers (not just revenue and volume) for better decision making.
- Manage costs by identifying areas where process improvements are required.
- Formulate pricing techniques for different products and customers.
- Reduce waste by producing the most profitable products sold to the most profitable customers.
- Make informed decisions to either develop or neglect customers that are not profitable.

#4 Spending Analysis Dashboard

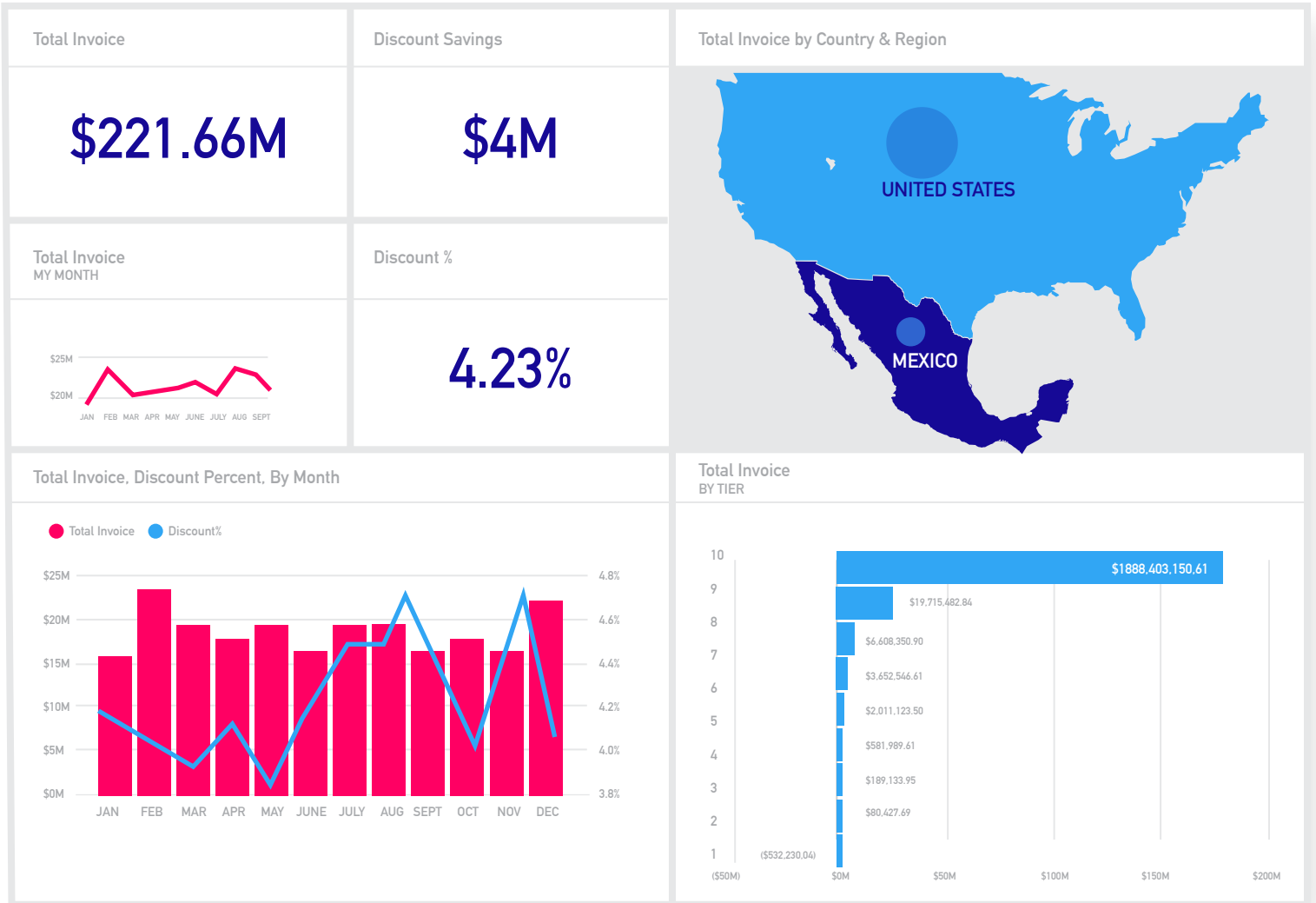


Improve prioritization & resource deployment.

Monitor buying and pricing behavior from stakeholders and suppliers.

- Improve budgeting and forecasting.
- Estimate your organization's sustainability impact.
- Minimize purchasing and control cost.
- Ensure better compliance.
- Identify price arbitrages.

#5 Procurement Analysis Dashboard



Optimize your working capital.

Who are your top vendors? On what categories do you spend the most? Which vendors offer the highest discounts and when? Procurement analysis provides a true picture of your vendors' circumstances.

Financial Metrics

Procurement dashboards help CFOs control spending by comparing the purchase order value or the budget with actual invoicing. Analytics aid in analyzing Incoterms® to identify cost-effective opportunities.

Pricing Metrics

Analytics show whether CFOs are paying different prices for similar services or products. They also enable analysis of spending and price development to assess cost increases for a SKU or category and the impact.

Compliance Metrics

Analytics help CFOs identify KPI and defined process variances and spend from unapproved suppliers. They also aid in fraud detection by analyzing factors like spend near approval limits and large spend without a point of sale.

Supplier Base Metrics

Analytics clarify the existing supplier base's performance and identifies opportunities such as global contracts and better pricing. They can also help ensure CFOs are properly leveraging the geographic reach of existing suppliers.

#6 Opportunity Dashboard

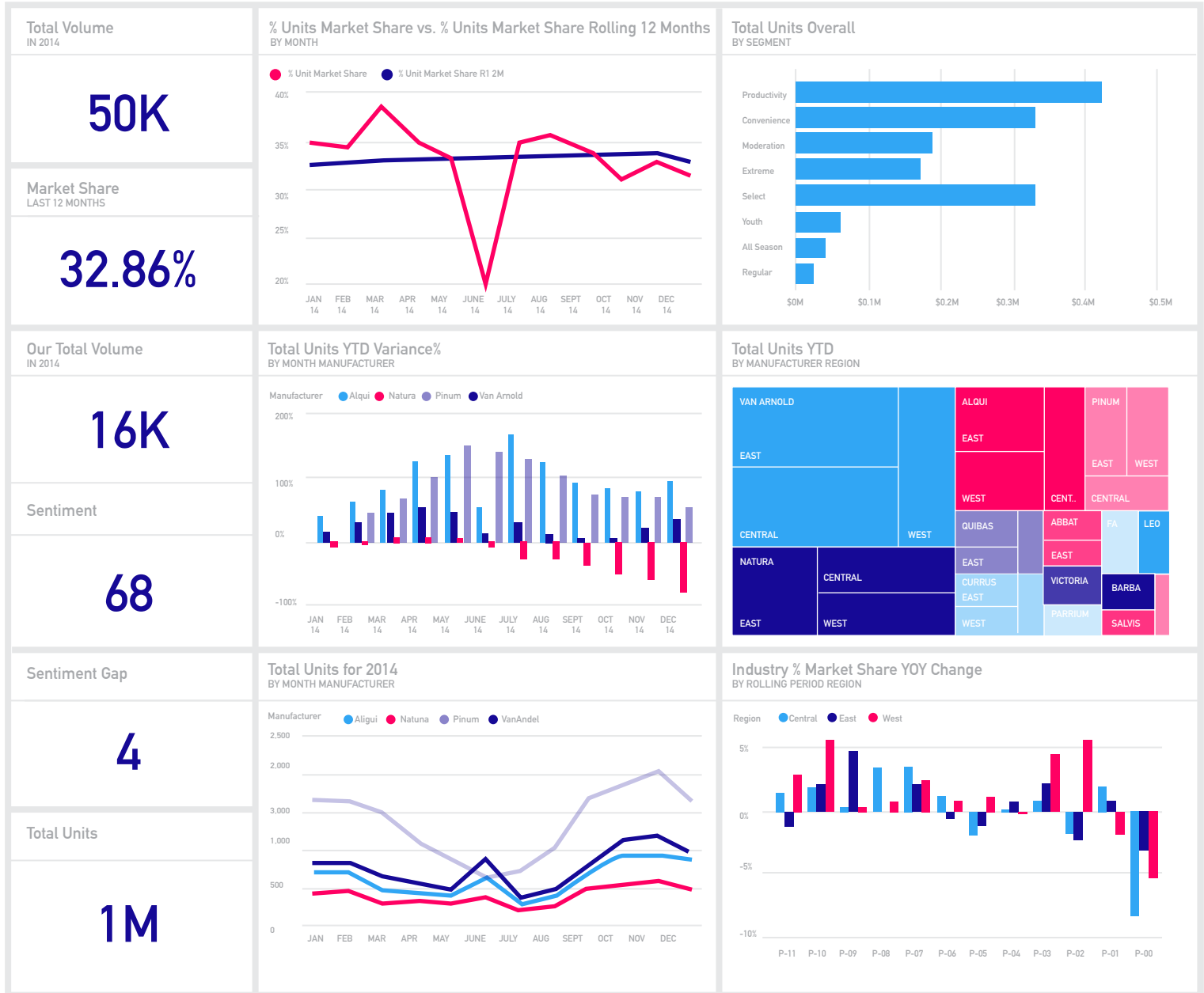


Know your future revenue.

Leverage data to understand demand, cast a clear vision, and execute strategies.

Opportunity analysis is a vital process for the growth of any organization and needs to be performed frequently.

#7 Sales & Marketing Dashboard



Understand demand & market share.

Sales and marketing reports for your business are as important as sunlight is for plants.

Sales and marketing reports play a crucial role in informing effective sales tactics. They help monitor the performance of sales and marketing teams, as well as the sales cycle. With the help of sales and marketing reports, you can keep track of tactics, their cost, and the ROI.

Take Your Organization to the Next Level with Data-Driven Decisions.

Empower your teams to make data-driven decisions with a highly flexible, cost-effective tool

[Talk to a Consultant](#)

Power BI Solutions

- Report automation
- Connect multiple data sources
- Eliminate manual spreadsheets
- Decrease errors
- Ensure data compliance
- Manage access to data & reports
- Identify trends & patterns
- Keep data secure

CSH Data Optimization Services

- Advanced & predictive analytics
- Data integration & cultivating
- Data strategy & consulting
- Data visualization & dashboards
- Analysis & process automation
- Microsoft Power BI implementation
- Customization & enhancement
- Support & maintenance

Dashboards for **every** team.

- Accounting & finance
- Management
- Sales & marketing
- Human resources

- Operation
- Customer service
- Purchasing & procurement
- Strategic planning



CLARK SCHAEFER HACKETT
BUSINESS ADVISORS