



ZAP Analytics and BI



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ZAP Analytics and BI overview

ZAP Analytics and BI delivers instant business reporting and powerful data visualization

Pre-built Analytics and Dashboards

Deliver immediate reporting with pre-built industry analytics and KPIs accessed via role-based dashboards. Ready-to-go, out-of-the-box for every function of the business.

Over 500 pre-built ratios, metrics, calculations, and charts ensure that business reporting is based on industry best practice while encouraging collaboration and assuring consistency.

Powerful flexibility and a user-friendly design mean pre-built dashboards can be used as a starting point from which to quickly achieve specific individual business reporting needs.

BI and Data Visualization

Uncover deeper insights and explore the factors influencing business performance with dynamic drill up, down, across and through of all dashboard and reporting elements.

Self-service analysis and data discovery are enabled via a powerful visualization and dashboarding interface that is dynamic, touch-enabled, optimized and responsive for all devices.



Pre-built functional analytics and role-based visualizations

Take a tour of ZAP's pre-built functional analytics and role-based dashboards. Explore the reporting interconnections between each user role and the pre-packaged modules and metrics available to each user type.



Chief Financial Officer

The Chief Financial Officer dashboard provides quick access to business metrics that are key to monitoring profitability and liquidity. Using a number of industry standard ratios and the ability to filter by company and month, users can quickly gain insight into company performance.

Drill up, down, across and through to uncover the details behind the analytics. Users can obtain consolidated reports with minimal effort. For multinational operations, there is also support for reporting currency and custom currency conversion.

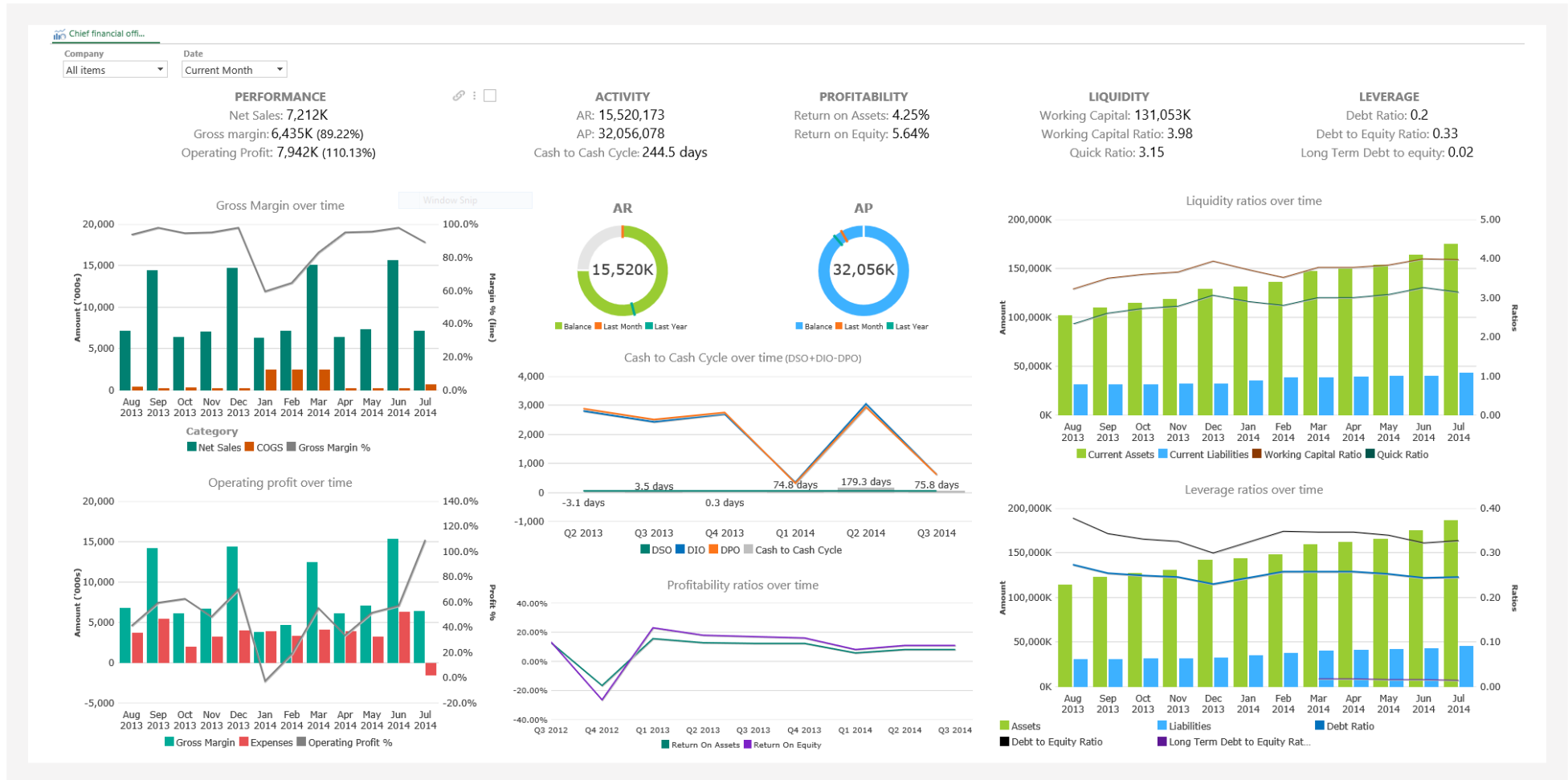
Audience

- CFO
- VP Operations
- Senior business managers

Business outcomes

- Monitor key performance metrics and business ratios
- Keep a close eye on trends relating to profitability and balance sheet ratios
- Discover all key information to monitor your business in one view

Chief Financial Officer dashboard



Chief Financial Officer key metrics

• Performance

- Selected month net sales (sales less sales returns and discounts)
- Selected month gross margin and percentage (net sales less cost of sales)
- Selected month operating profit (gross margin less operating expenses)

• Activity

- Selected month accounts receivable balance
- Selected month accounts payable balance
- Cash to cash cycle (days inventory outstanding+days sales outstanding—days payable outstanding)

• Profitability

- Return on assets (net operating profit after tax/total assets)
- Return on equity (net operating profit after tax/total equity)

• Liquidity

- Working capital (current assets—current liabilities)
- Working capital ratio (current assets/current liabilities)
- Quick ratio (current assets—inventory/current liabilities)

• Leverage

- Debt ratio (liabilities/assets)
- Debt to equity ratio (liabilities/equity)
- Long term debt to equity ratio (non-current liabilities/equity)

• Gross margin over time

- Net sales and cogs comparison over the last twelve months

• Operating profit over time

- Gross margin and expenses comparison over the last twelve months
- Line graph operating profit % over the last twelve months

• AR circle gauge

- Accounts receivable balance current month, last month and same month last year

• AP circle gauge

- Accounts payable balance current month, last month and same month last year
- Liquidity ratios over time
- Current assets and current liabilities comparison over the last twelve months
- Line graph working capital ratio and quick ratio over the last twelve months

• Leverage ratios over time

- Total assets and total liabilities comparison over the last twelve months
- Line graph debt ratio, debt to equity ratio and long term debt to equity ratio over the last twelve months
- Cash to cash cycle over time (DIO+DSO—DPO)
- Line graph DSO, DIO, and DPO comparison over the last twelve months
- Cash to cash cycle comparison over the last twelve months (showing data labels)

• Profitability ratios over time

- Line graph return on assets and return on equity over the last twelve months

Income Statement

The cornerstone of any business is timely financial reporting. ZAP's income statement dashboard utilizes the traditional income statement and supplements it with trend analysis and reporting on specific margins.

The dashboard allows key decision makers to view the business profitability and growth trends at a glance, with the ability to filter by company, fiscal month and budget model. The user can also click on individual numbers to reveal more detail.

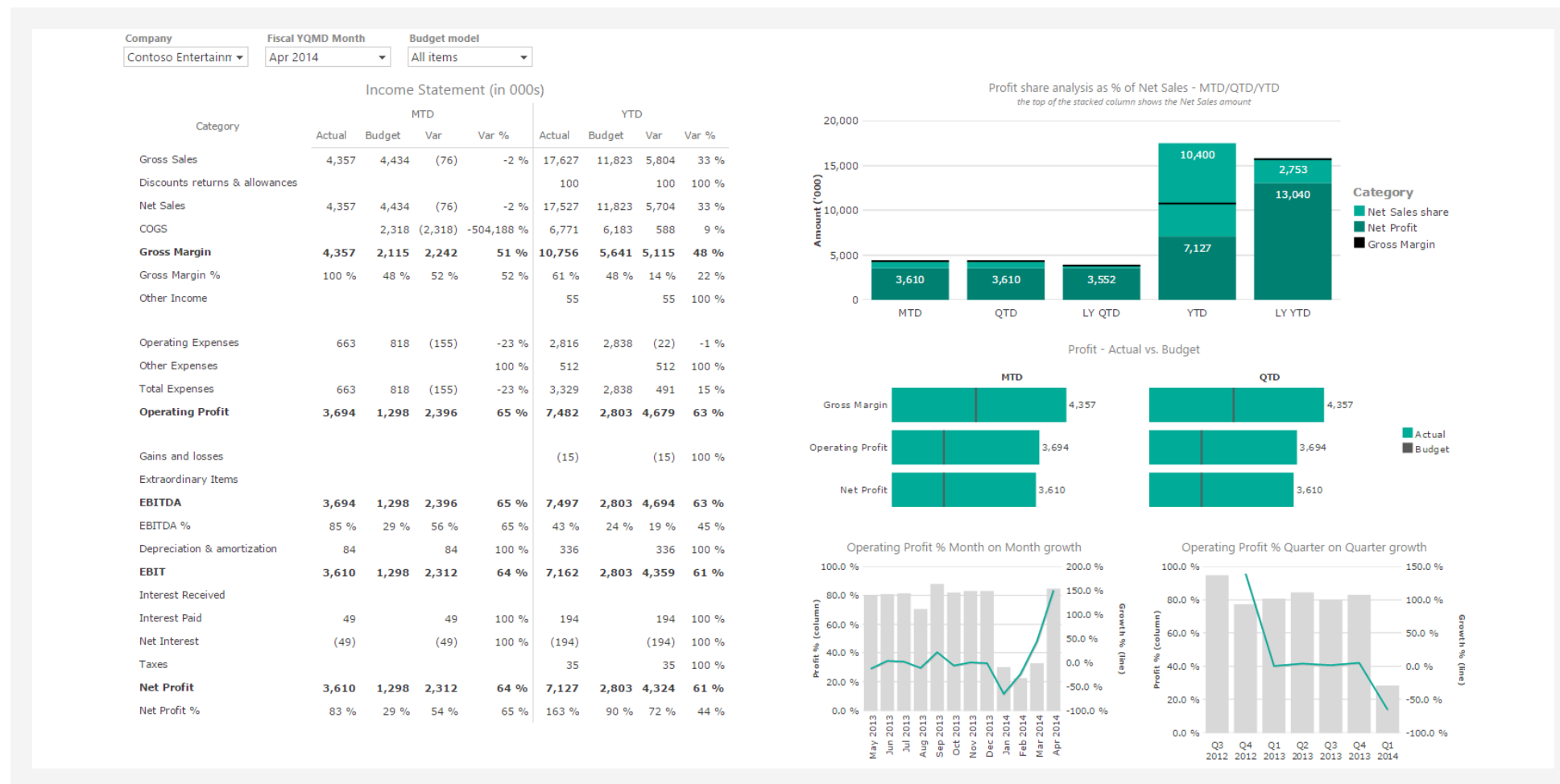
Audience

- President
- CFO
- Financial Accountants

Business outcomes

- Monitor company profitability and growth trends
- Review and compare profit and growth over time
- Keep a close eye on specific margins

Income Statement dashboard



Income Statement key metrics

- **Income statement**
 - Company currency and selected budget, current month and year to date
- **Profit share by net profit, gross margin**
- **Profit—actual vs budget**
 - Actual budget gross margin
- **Operating profit % month on month growth**
 - Columns indicates monthly operating %, line indicates growth
- **Operating profit % quarter on quarter growth**
 - Columns indicates quarter operating %, line indicates growth



Accounts Receivable

The Accounts Receivable dashboard is a vital tool in assisting managers to improve their companies' cash flow and increase collection efficacy.

Key industry metrics combined with other information on the dashboard helps managers improve the order-to-cash cycle time. Users can filter by company, customer group, classification, and line of business.

Managers can quickly ascertain collection trends and identify problematic customers. No more consolidating multiple aged trial balances. The dashboard displays a customer's interaction with your business, displaying it all in one central view, with the ability to drill-down and see more detail.

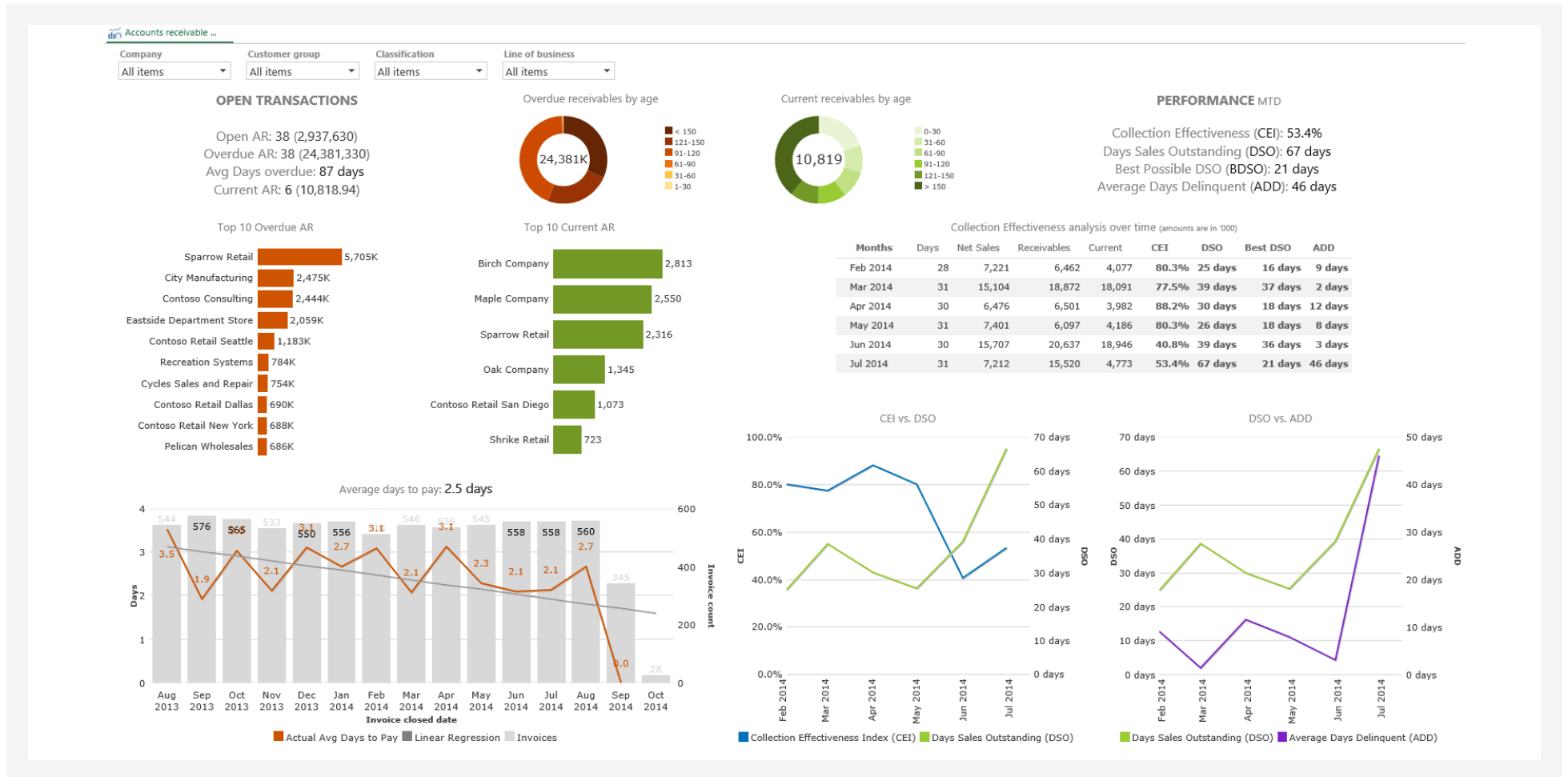
Audience

- President
- CFO
- Collection Manager
- Collection Agent
- Accountant

Business outcomes

- Monitor collection effectiveness and customer balances
- Review customer invoicing and collection trends
- Analyze the effect of collections on cash flow
- Find out which customers are consistently late at making payments

Accounts Receivable dashboard



Accounts Receivable key metrics

• Open transactions

- Number of customers with an unpaid AR balance and amount
- Number of customers with an overdue AP balance and amount
- Average number of days AR invoices are overdue
- Number of customers with a current AR balance and amount

• Overdue receivables by age

- Overdue balance by aging bucket, hover over to see amounts the center amount is the total amount overdue

• Current receivables by age

- Current balance by aging bucket, hover over to see amounts the center amount is the total amount overdue

• Performance month to date

- Collection effectiveness index (CEI) for the selected month. CEI is a percentage that expresses the effectiveness of collection efforts over time. The closer to 100 percent, the more effective the collection effort

- Days sales outstanding (DSO) for the selected month. Measures the number of days on average a company takes to collect its debts
- Best possible DSO (BDSO) for the selected month. Measures the number of days it takes on average to collect your most current invoices
- Average days delinquent (add) for the selected month. Measures the average number of days invoices are paid past due

• Top 10 overdue AR

- Top 10 customers with the largest overdue AR balance

• Top 10 current AR

- Top 10 customers with the largest current AR balance

• Collection effectiveness over time

- Summary of the collection metrics over the last 6 months
- Net sales is the general ledger balance of sales less sales returns and discounts for the month
- Receivables is the general balance for the month
- Current is balance of invoice generated that month not due (omitting unpaid invoices where the invoice date and due date where in the selected month)

- Collection effectiveness index (CEI) for the selected month
- Days sales outstanding (DSO) for the selected month
- Best possible DSO (BDSO) for the selected month
- Average days delinquent (add) for the selected month

• Open days to pay over time

- Average days to pay over four months
- Number of invoices processed in the last four months
- Average days in the last four selected month
- Straight line linear regression trend of the average days to pay over the last four months

• CEI vs DSO

- Comparing the collection effectiveness index (CEI) with days sales outstanding (DSO) over the last four months. Comparing the order to cash process efficiency to the collection effectiveness

• DSO vs ADD

- Comparing days sales outstanding (DSO) vs average days delinquent (ADD). This compares your non delinquent customers to your delinquent customers

Accounts Payable

Having effective controls over your accounts payable team is critical to maintaining good supplier relationships. The accounts payable dashboard displays key metrics, enabling managers to maintain good vendor relationships, continuity of supply and keep a watchful eye on cash flow.

This information assists in monitoring the effectiveness of accounts payable workflows and the processing efficiency of your payables team. The dashboard allows the users to provide a corporate view and use of various filters help gain insight on how a vendor or group is performing across all your entities.

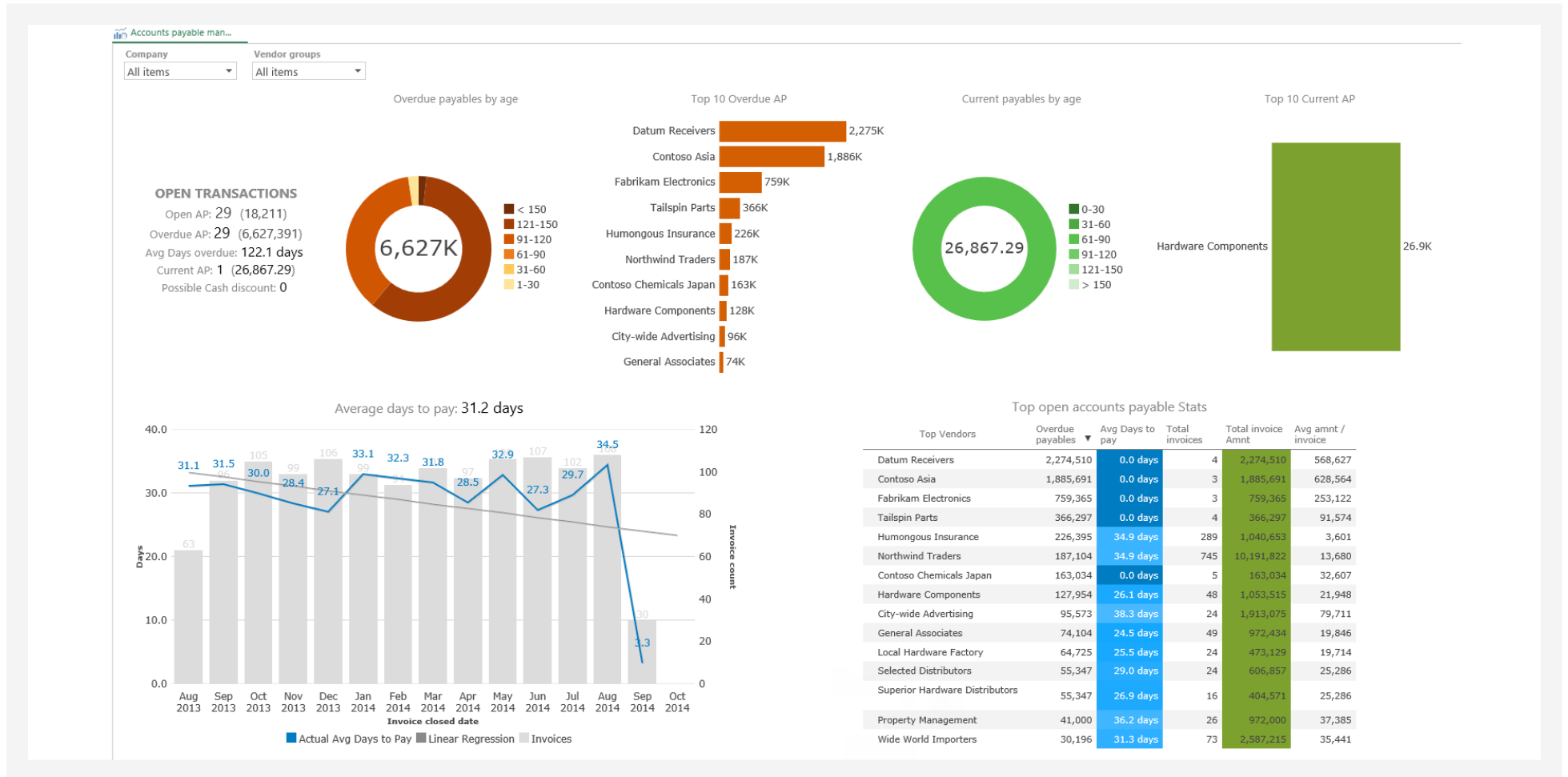
Audience

- CEO
- CFO
- Accountants
- Accounts Payable Manager
- Accounts Payable Agent

Business outcomes

- Monitor accounts payable team efficiency and procure to pay workflow effectiveness
- Analyze payment processing and your top vendors
- Maintain effective vendor relationships

Accounts Payable dashboard



Accounts Payable key metrics

- **Open transactions**

- Number of vendors with a unpaid AP balance and amount
- Number of vendors with an overdue AP balance and amount
- Average number of days AP invoices are overdue
- Number of vendors with a current AP balance and amount
- Value of settlement discount available in company currency

- **Overdue payables by age**

- Overdue balance by aging bucket, hover over to see amounts the center amount is the total amount overdue

- **Top 10 overdue AP**

- Top 10 vendors with the largest overdue AP balances, ordered by balance descending

- **Current payables by age**

- Current balance by aging bucket, hover over to see amounts the center amount is the total amount overdue

- **Top 10 current AP**

- Top 10 vendors with the largest current AP balance

- **Days to pay over time**

- Average days to pay over twelve months
- Columns show number of invoices processed in the last twelve months
- Line graph shows actual average days to pay in the last twelve months
- Straight line linear regression trend of the average days to pay over the last twelve months

- **Top open accounts payable stats**

- Top vendors by amount overdue, hover over the vendor name to see vendor information
- Overdue balance for the vendor
- Average days to pay the vendor for all time
- Number of invoices processed relating to the vendor for all time
- Total value of invoices processed in the company currency relating to the vendor for all time
- Average invoice amount for the vendor

Procurement Manager

The Procurement Manager dashboard gives users powerful insight into procurement operations. The dashboard shows the information needed to manage the procure-to-pay process and maintain a robust supply chain. At a glance, users can see metrics that assist in maintaining a good relationship with key vendors.

Spend analysis metrics give visibility of the top items procured. Cell slicing features enable users to see analytics relating to specific vendors or items. Users can filter by company, date, vendor group, and procurement category.

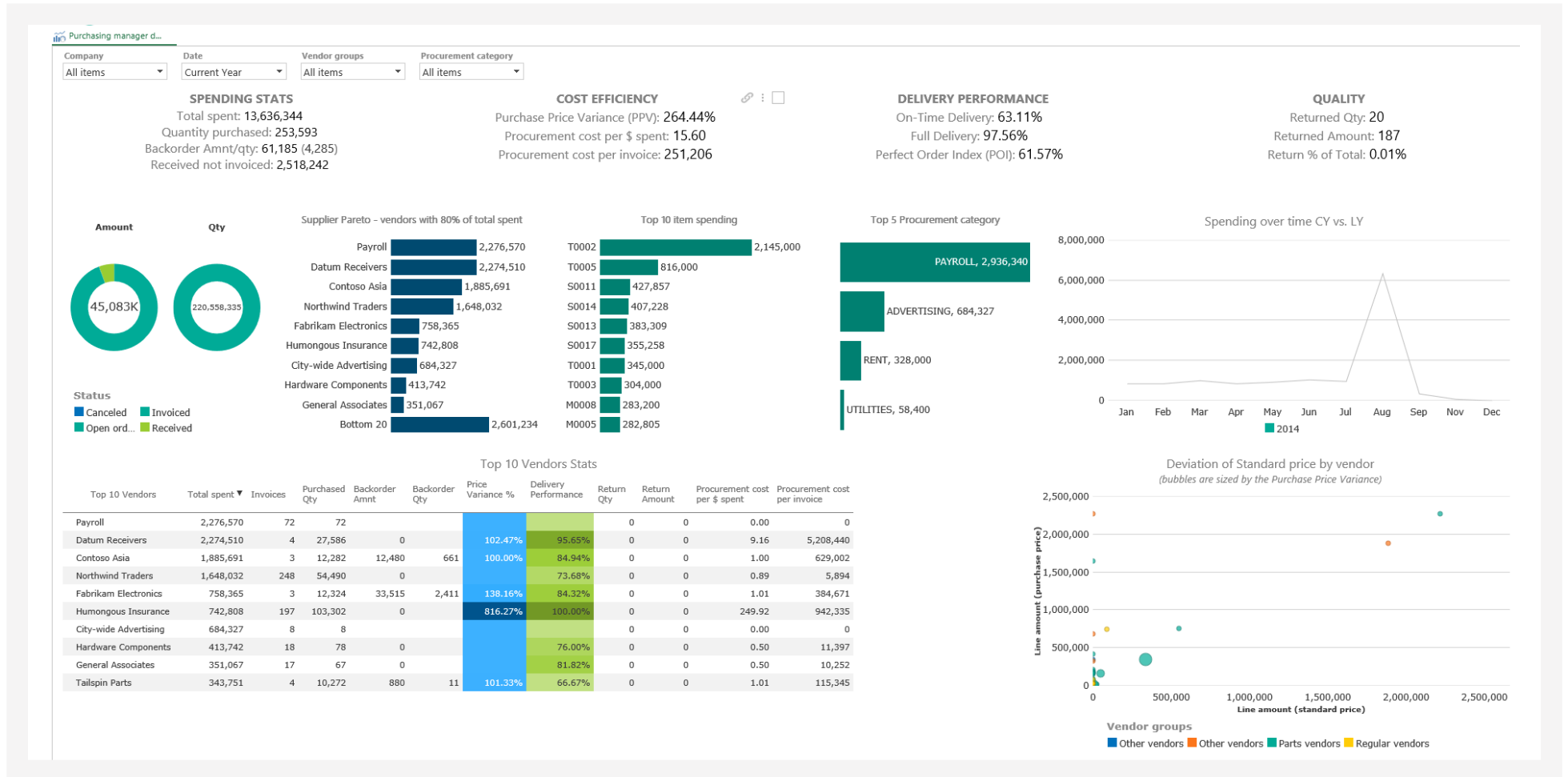
Audience

- Procurement Manager

Business outcomes

- Monitor vendor performance and spending
- Keep a close eye on trends relating to spending and delivery performance
- Find out all the key information relating to vendors

Procurement Manager dashboard



Procurement Manager key metrics

- **Spending stats**

- Total spent is the total value of purchase orders raised in the current year
- Quantity purchased is the total quantity on invoices processed in the current year based on purchase unit
- Current backorder amount and quantity
- Received not invoiced is the value of purchase order lines received but no invoice has been processed

- **Cost efficiency**

- Purchase price variance % (actual purchase order invoice value/invoice value using the standard cost price). This show the average variance between unit price on invoice and standard cost in the system
- Procurement cost per \$ spent (invoice value based on inventory value/actual purchase order invoice value). Amount above 1 indicates the amount of markup costs on inventory items. Below 1 indicates rebates or write down on items
- Procurement cost per invoice (invoice value based on inventory value/actual purchase order invoice value). Gives an indication of the amount of markups or rebates processed against an invoice

- **Delivery performance**

- On-time delivery gives the percentage of purchase orders delivered within the expected delivery date. This measures delivery precision

- Full delivery gives the percentage of purchase orders delivered in full on first delivery. This measures delivery fulfillment
- Perfect order index (poi) (delivery precision delivery fulfillment)

- **Quality**

- Returned quantity for the current year in purchase units
- Returned amount for the current year
- Return % of total: the value of returned items compared the total value of orders for current year. This is measure of vendor quality

- **Open purchase statuses**

- Value of purchase order lines by current line status for the current year
- Quantity on purchase order lines by current line status for the current year based on purchase unit of measure

- **Supplier Pareto—vendor with 80% of total spend**

- Lists the vendors and their spend value that make up 80% of the total procurement spend. The graph gives insight in to the key vendors in your supply chain

- **Top 10 item spending**

- Showing the top ten inventory items by invoice value for current year

- **Top 5 procurement category**

- Showing the top five procurement categories by invoice value for the current year

- **Spending over time cy vs ly**

- Quantity in stocking units moved this month
- Quantity movement in stocking unit by direction over the last twelve months

- **Top 10 vendor stats (by total spend for current year)**

- Total spent for the current year
- Number of invoices processed for the current year
- Quantity purchased in purchase unit for current year
- Amount currently on backorder
- Quantity currently on backorder
- Calculated price variance for the vendor where a standard cost price exists for the items been procured.
- Delivery performance is the perfect order index (poi) for the vendor the current year.
- Return quantity for the vendor for the current year
- Return amount for the vendor for the current year
- Procurement cost per \$ spent
- Procurement cost per invoice

Inventory Manager

With this dashboard, managers can analyze key inventory metrics using industry standard analytics right out of the box.

The dashboard gives users the ability to analyze internal versus external inventory movements and volume of stocked units moved to maintain optimal stock levels. The drill functionality allows the users to see both high-level analytics and the detail behind them. Users can filter by company, date, item group and unit of measure.

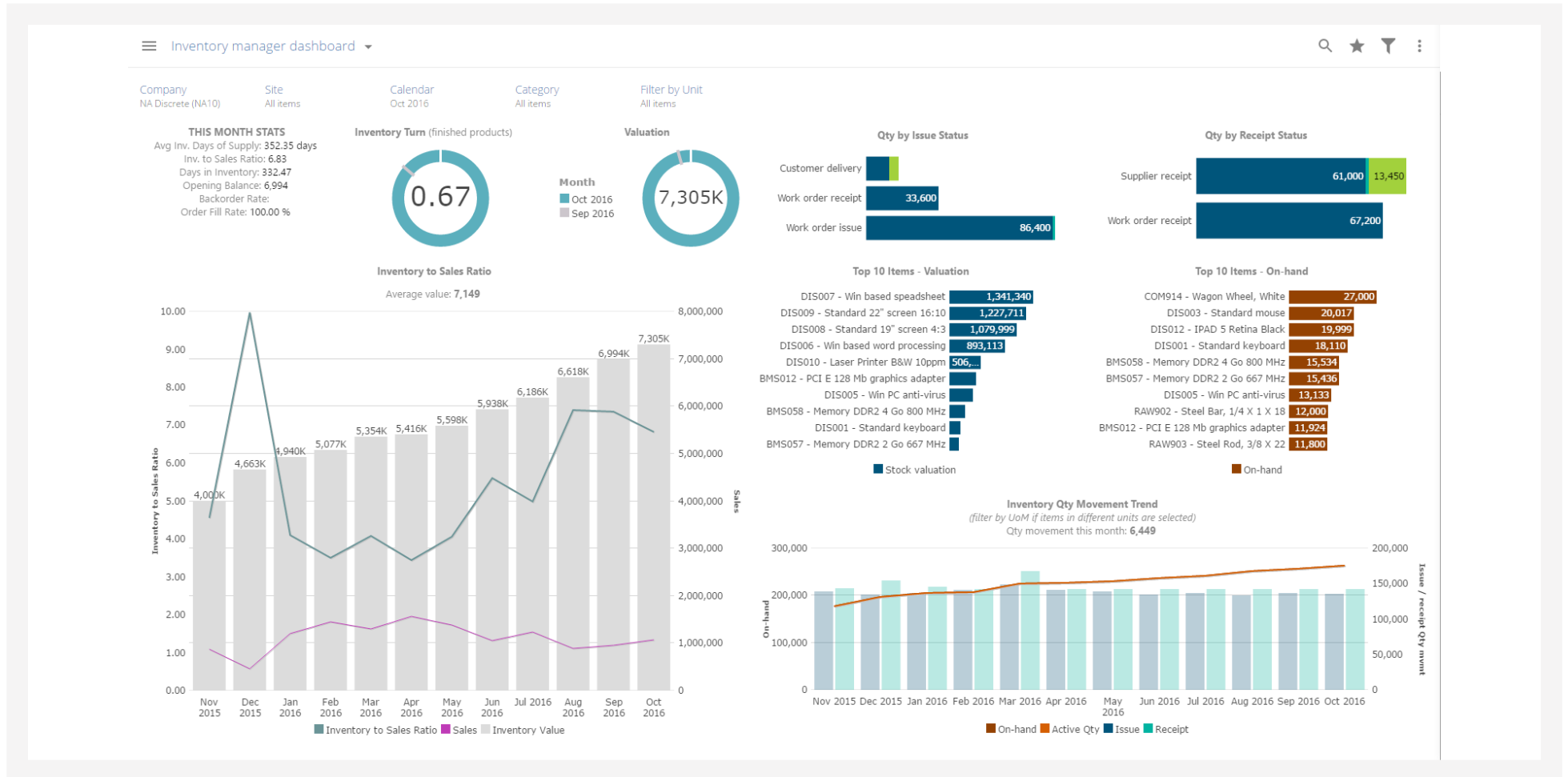
Audience

- Supply Chain Manager
- Procurement Manager
- Stock Controller

Business outcomes

- Monitor key inventory trends
- Keep a close eye on trends relating to inventory movement and valuation
- Find out all the key information to monitor inventory in one view

Inventory Manager dashboard



Inventory Manager key metrics

• This months stats

- Average inventory days of supply (inventory valuation/average daily cost of sales)
- Inventory to sales ratio (inventory valuation/sales amount)
- Days in inventory (average inventory value/average daily cost of sales amount)
- Opening balance of inventory for the selected month
- Backorder rate for the selected month (amount on backorder/ total sales order amount entered for the month)
- Order fill rate is the percentage of order lines fulfilled in one delivery
- Inventory turn
- Inventory turn (cogs/average inventory) comparison selected month vs prior month

• Valuation

- Inventory valuation comparison selected month vs prior month

• QTY by issue status

- Number of items send from warehouse by their current issue status

• QTY by receipt status

- Number of items received into the warehouse by their current receipt status

• Inventory to sales ratio over time

- Average inventory value over the selected twelve months
- Net valuation change from selected period to prior period
- Inventory valuation comparison over the last twelve months (showing data labels)
- Line graph show sales and inventory to sales ratio comparison over the last twelve months

• Top 5 item group valuation

- Showing the top five item groups by stocking unit quantity movement split by direction. Use the cell slicing to show the effects on inventory valuation and quantity movement over time

• Top 5 qty movement by origin

- Showing the top five transaction types by stocking unit quantity movement split by direction. Use the cell slicing to show the effects on inventory valuation and quantity movement over time. Compare internal transfer volume with external transfer volume

• Inventory qty movement trend

- Quantity in stocking units moved this month
- Quantity movement in stocking unit by direction over the last twelve months
- Inventory reports included but separate to the dashboard
- Inventory aging analysis report—show inventory movement over time
- Item analysis report—quantity on hand compared to last sale qty and date also last purchase qty and date
- Slow moving inventory analysis—displays inventory that has not been sold or consumed ordered by oldest descending

Production Manager

Initially presenting a high-level overview, the Production Manager dashboard provides more detailed analysis by combining company operations, drill-down to the individual work center, and filtering by company, date, production order type, scheduling status and site.

Production controllers can gain insight to capacity and efficiency. The dashboard can assist in scheduling and capacity planning. Efficiency metrics give valuable feedback on performance and output quality.

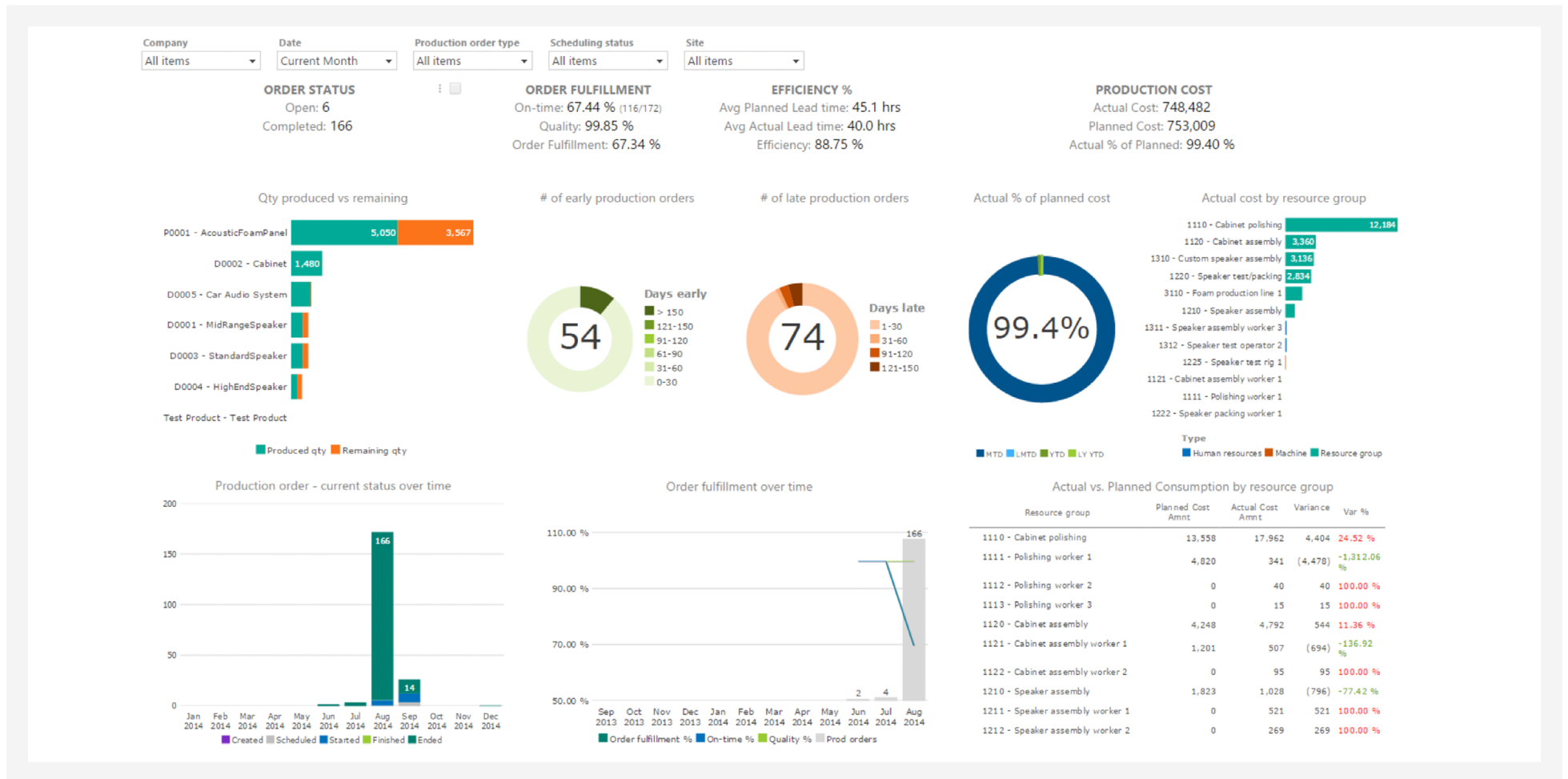
Audience

- Supply Chain Manager
- Production Manager
- Production Controller

Business outcomes

- Monitor production costs and performance
- Keep a close eye on capacity and production costs
- Find out scheduling pressure points

Production Manager dashboard



Production Manager key metrics

- **Order status**

- Number of open production orders for current month (not ended or reported as finished)
- Number of completed production orders for the current month (marked as ended or reported as finished)

- **Order fulfillment**

- On-time delivery gives the percentage of production orders completed within the expected delivery date
- Quality gives the percentage good quantity compared to the total number of produced items
- Order fulfillment is on-time percentage multiplied by the quality percentage

- **Efficiency**

- Average planned lead time based on the planned time to complete operations divided by the number of production orders
- Average actual lead time based on the actual time to complete operations divided by the number of production orders
- Efficiency % is the ratio of actual to planned cycle times

- **Production cost**

- Actual cost of all the production orders for the current month
- Planned cost or estimated cost of all the production orders for the current month
- Actual % of planned (actual cost/planned cost)

- **Quantity produced vs remaining**

- Top 10 items by production volume, produced quantity vs remaining quantity
- Number of early production orders
- Number of production orders that have been completed before the expected date

- **Number of late production orders**

- Number of late production orders by aging bucket. Hover over the colors on the circular gauge to see the number of production orders in each aging bucket. The number in the center represents the total number of late production orders

- **Actual % of planned cost**

- Actual % of planned (actual cost/planned cost) for the current month, prior month, year to date and prior year to date. Value in the middle of the gauge is the current month percentage. Hover over the lines on the circular gauge to see the percentages for the other periods

- **Actual cost by resource group**

- Actual production order cost by resource group dissected by resource type
- Ordered by amount descending

- **Production order—current status over time**

- Count of production orders over the current year by status. Data labels show the count of ended production orders. Hover over the color on the bar to see the value of the other statuses

- **Order fulfillment over time**

- Count of production orders over the current year. Data labels show the count of ended production orders
- Line graph the order fulfillment percentage, on-time percentage and quality percentage

- **Actual vs planned consumption by resource group**

- Resource group id and description
- Planned cost amount for the current month
- Actual cost amount for the current month
- Variance (actual cost minus planned cost)
- Variance percentage (variance/actual cost)

Vice President of Sales

Vice President of Sales can effectively monitor sales division performance across all operations in a single view with this dashboard. Currency conversion and support for reporting currencies allows multinational companies to quickly get a consolidated view in their currency of choice.

The pre-built analytics allow the VP to analyze trends and make informed decisions on strategy knowing all information is accurate and up to date. While filtering, cell slicing, and drill through allows the VP to investigate the finer detail and quickly find any issues.

Audience

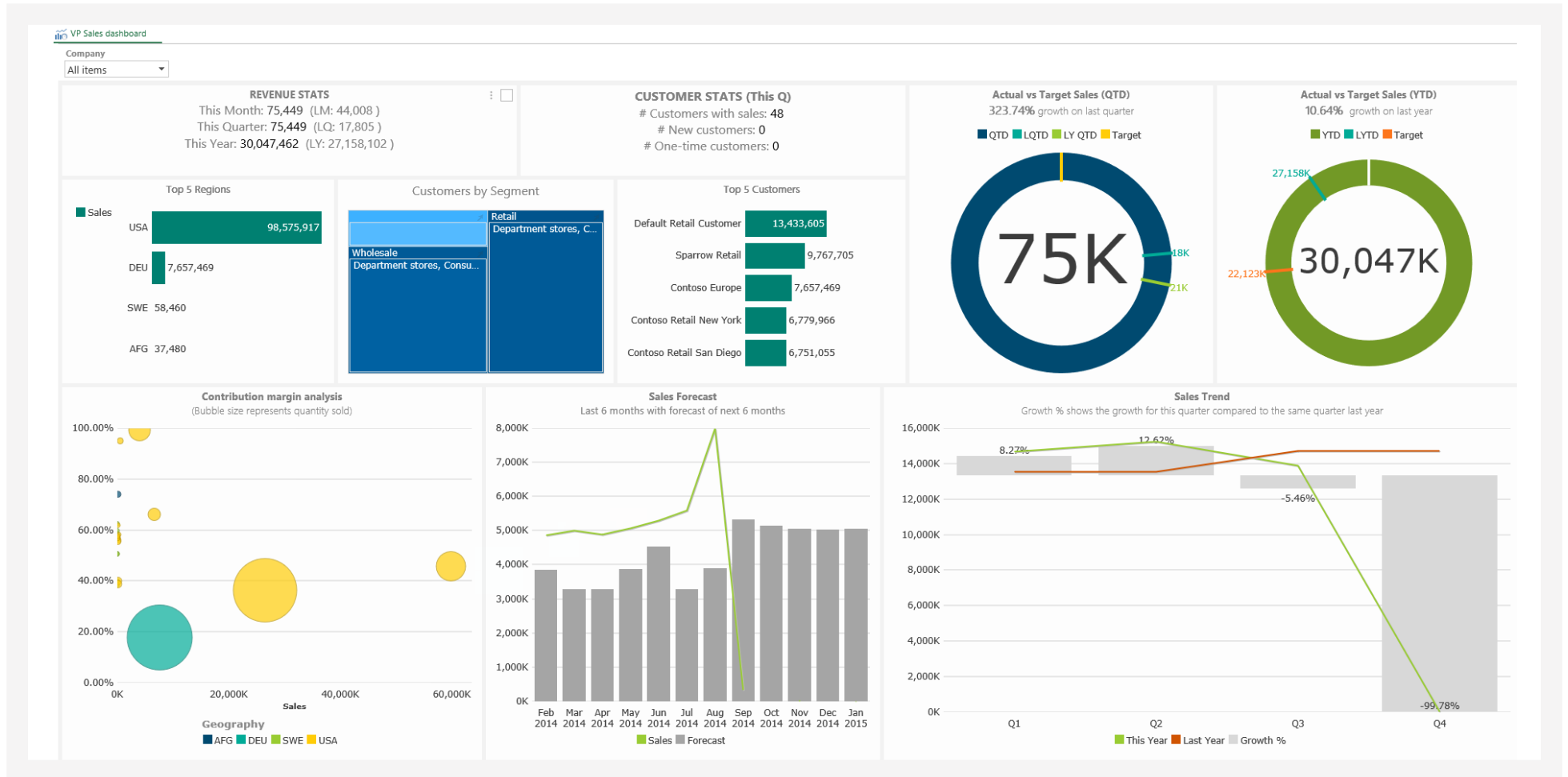
- CEO
- CFO
- VP sales

Business outcomes

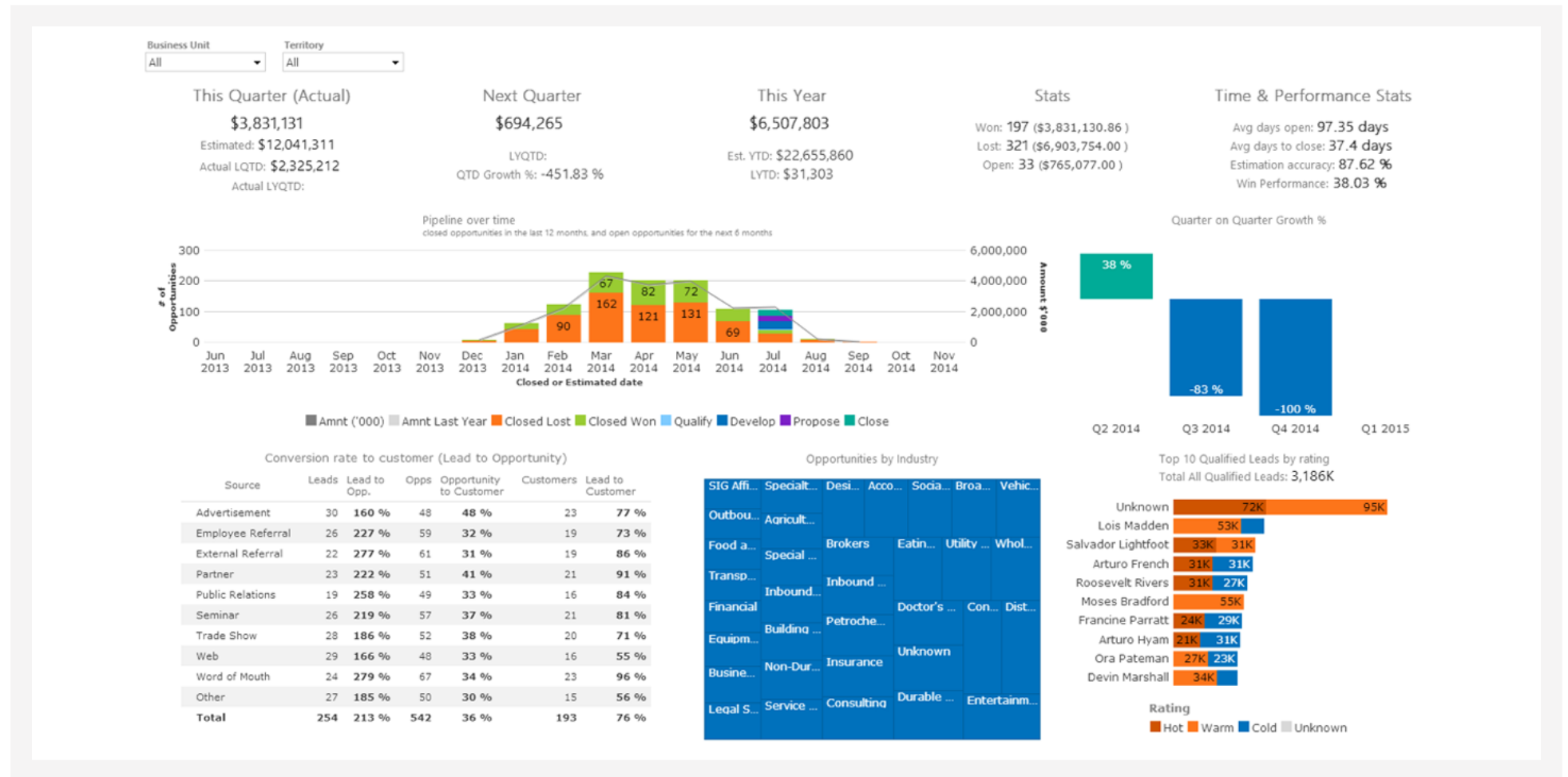
- Monitor key revenue indicators
- Keep a close eye on customers and revenue trends
- Find out key regions, customers, and products
- Track opportunities, quotes, and orders

SALES

Vice President of Sales dashboards



Vice President of Sales dashboards



Vice President of Sales key metrics

- **Revenue stats**
 - Invoiced sales current month (prior month)
 - Invoiced sales current quarter (prior quarter)
 - Invoiced sales current year to date (prior year to date)
- **Customer stats for this quarter**
 - Customer with sales, is number of distinct customers invoiced this quarter
 - New customers is number of distinct customers invoiced this quarter that have not been invoiced previously
 - One-time customer invoices created during this quarter
- **Actual vs target sales quarter to date**
 - Percentage growth compared to last quarter
 - Current quarter to date, is shown as the value in the center
 - Prior quarter to date
 - Prior year same quarter value
 - Current quarter forecasted sales
- **Actual vs target sales year to date**
 - Percentage growth compared to last year
 - Current year to date, is shown as the value in the center
 - Prior year to date
 - Current year forecasted sales
- **Top 5 regions**
 - Invoiced sales by order account customer location
- **Sales forecast**
 - Columns represent forecast amount
 - Line graph represent invoiced sales value
- **Sales trend**
 - Columns show the growth per quarter for the last four quarters
 - Line graph show current year sales vs prior year sales amount by quarter hover over graph lines to see values

Vice President of Sales key metrics cont.

OPPORTUNITIES

- **Analysis and charts**

- Opportunity Analysis Accuracy by Owner
- Opportunity Analysis by Owner
- Opportunity Analysis by Product Type
- Opportunity Analysis by Top 10 Opportunities
- Opportunity Estimated Open Revenue by Rating
- Opportunity by Pipeline Stage
- Opportunity by Pipeline Stage and Month
- Opportunity by Status
- Opportunity by Status and Month

- **Dashboard**

- Opportunity Dashboard

- **KPIs**

- Opportunity Accuracy
- Opportunity Average Days Close
- Opportunity Average Days Open
- Opportunity Count—Less is Better
- Opportunity Count—More is Better
- Opportunity Win %

- **Scorecard**

- Opportunity scorecard

QUOTES

- **Analysis and charts**

- Quote Analysis by Account Type & Status
- Quotes Analysis by Product Type
- Quote Win % by Top 10 Owners
- Quotes by Status

- **Dashboard**

- Sales Manager Dashboard

- **Scorecard**

- Opportunity Dashboard

ORDERS

- **Analysis and charts**

- Orders Analysis by Account Type & Status
- Orders Analysis by Product Type
- Orders by Status

- **Dashboard**

- Quotes and Orders Dashboard

- **Scorecard**

- Sales Manager Scorecard

INVOICES

- **Analysis and charts**

- Invoice Analysis by Outstanding Customer

- **Accounts**

- Invoice Analysis by Product
- Invoice Analysis by Territory
- Invoice Analysis by Top 10 Customer Accounts

- **KPIs**

- Invoice Average Amount
- Invoice Product Revenue
- Invoice Revenue

Sales Manager

The Sales Manager dashboard gives users up to date information on sales trends and top performing analytics, allowing the Sales Manager to efficiently direct resources.

The dashboard gives the user the ability to have a holistic view of all the company's information in a single dashboard with the ability to drill-down into key areas. The dashboard allows users to quickly select prior periods for comparative views.

Audience

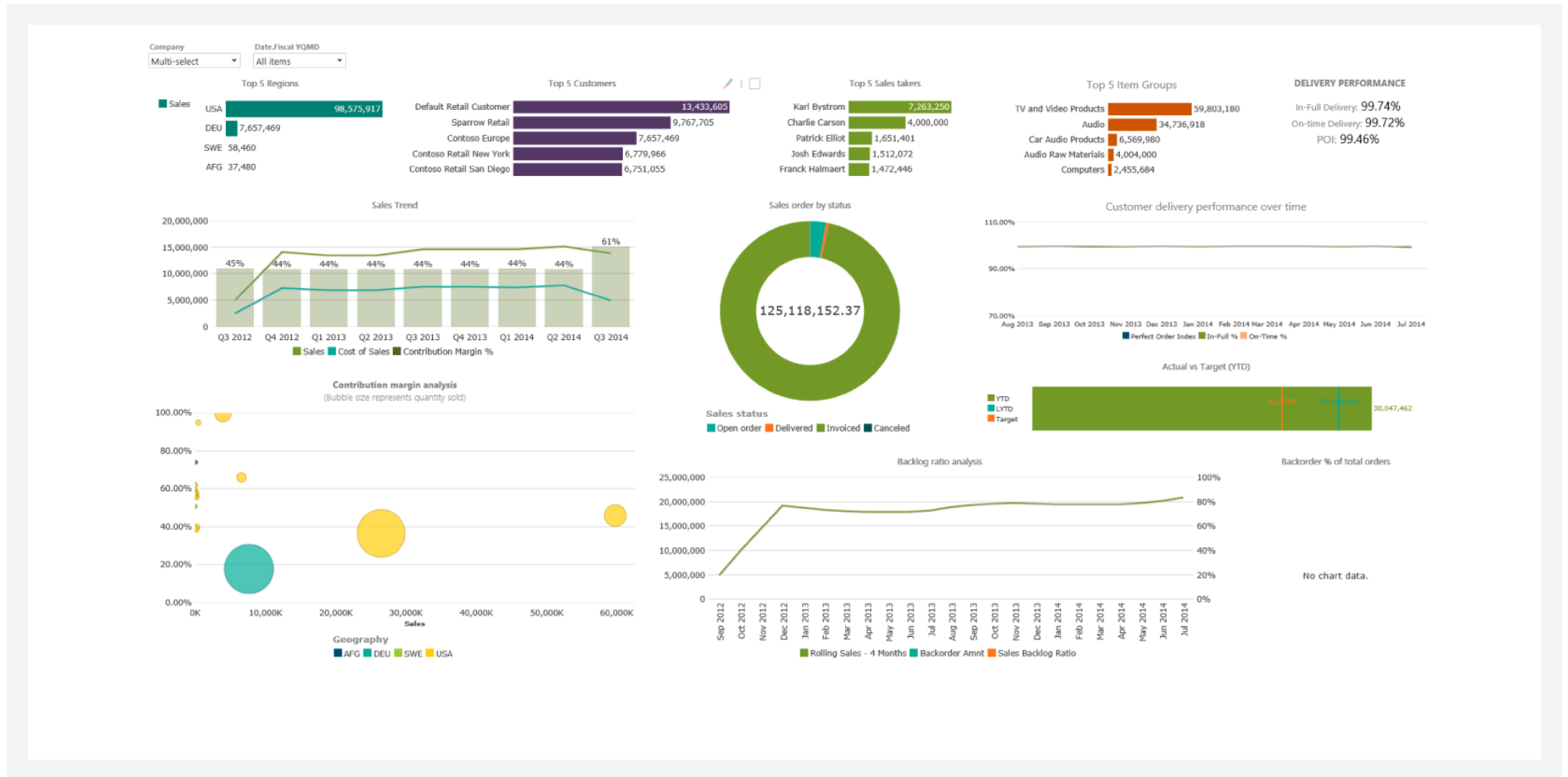
- VP Sales
- Sales Manager

Business outcomes

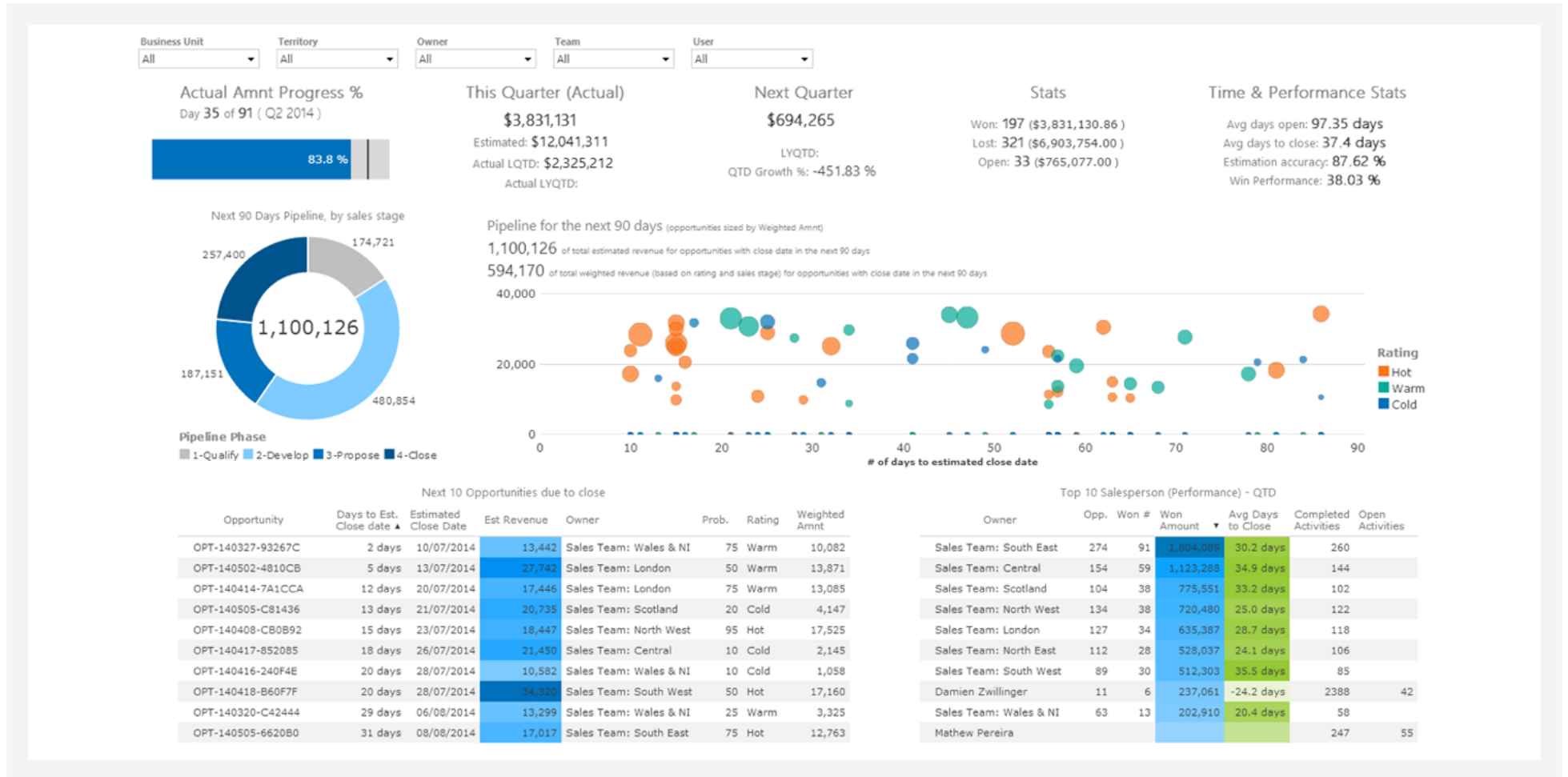
- Monitor performance against target
- Track KPIs such as win-loss ratio
- Identify top performing employees
- Track opportunities, quotes, and orders

SALES

Sales Manager dashboards



Sales Manager dashboards



Sales Manager key metrics

- **Top 5 regions**
 - Invoiced sales by order, account, and customer location
- **Top 5 customers**
 - Invoiced sales by order account ordered by total sales descending
- **Top 5 sales takers**
 - Invoiced sales by person who entered the sales order, invoices without an order taker are omitted
- **Top 5 item groups**
 - Invoiced sales by item group, invoices without an item group such as free text invoices are omitted
- **Delivery performance**
 - In-full delivery gives the percentage of sales orders delivered in full on first delivery. This measures delivery fulfillment
 - On-time delivery gives the percentage of sales orders delivered within the expected delivery date. This measures delivery precision
 - Perfect order index (poi) delivery precision delivery fulfillment
- **Sales trend**
 - Show the contribution margin by quarter for the last nine quarters
 - Line graph show sales and cost of sales amount by quarter
- **Sales order by status**
 - Shows sales order amount by current sales order line status. Hover over the circular gauge colors to reveal amounts for the different statuses. The amount in the center is the total sales order value
- **Customer delivery performance over time**
 - In-full delivery percentage over the last twelve months
 - On-time delivery percentage over the last twelve months
 - Perfect order index (poi) (delivery precision* delivery fulfillment) over the last twelve months. Hover over line to see the line values for the selected month
- **Actual vs target (YTD)**
 - Year to date invoiced sales
 - Prior year to date sales
 - Current year to date forecast
- **Contribution margin analysis**
 - Bubble size represents quantity sold
 - Legends shows the relevant regions and the color used, hovering over the bubble shows invoiced sales amount in thousands, contribution margin and the quantity sold in sales units
- **Backlog ratio analysis**
 - Line graph shows 4 month rolling sales over 2 years backorder amount
 - Sales backlog ratio
- **Backlog % of total orders**
 - Line graph shows 4 month rolling sales over 2 years backorder amount
 - Sales backlog ratio

Sales Manager key metrics cont.

OPPORTUNITIES

- **Analysis and charts**

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- Opportunity Analysis by Owner
- Opportunity Analysis by Product Type
- Opportunity Analysis by Top 10 Opportunities
- Opportunity Estimated Open Revenue by Rating
- Opportunity by Pipeline Stage
- Opportunity by Pipeline Stage and Month
- Opportunity by Status
- Opportunity by Status and Month

- **Dashboard**

- Opportunity Dashboard

- **KPIs**

- Opportunity Accuracy
- Opportunity Average Days Close
- Opportunity Average Days Open
- Opportunity Count—Less is Better
- Opportunity Count—More is Better
- Opportunity Win %

- **Scorecard**

- Opportunity scorecard

QUOTES

- **Analysis and charts**

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- **Scorecard**

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ORDERS

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- Orders Analysis by Account Type & Status
- Orders Analysis by Product Type
- Orders by Status

- **Dashboard**

- Quotes and Orders Dashboard

- **Scorecard**

- Sales Manager Scorecard

INVOICES

- **Analysis and charts**

- Invoice Analysis by Outstanding Customer

- **Accounts**

- Invoice Analysis by Product
- Invoice Analysis by Territory
- Invoice Analysis by Top 10 Customer Accounts

- **KPIs**

- Invoice Average Amount
- Invoice Product Revenue
- Invoice Revenue

Sales Representative

The Sales Representative dashboard gives sales personnel the ability to track their progress accurately. This dashboard allows the salesperson to identify key opportunities and find out if demand generation has been effective in increasing sales. This dashboard also gives the user important insights into the overall revenue stream and allows them to focus on the areas of improvement.

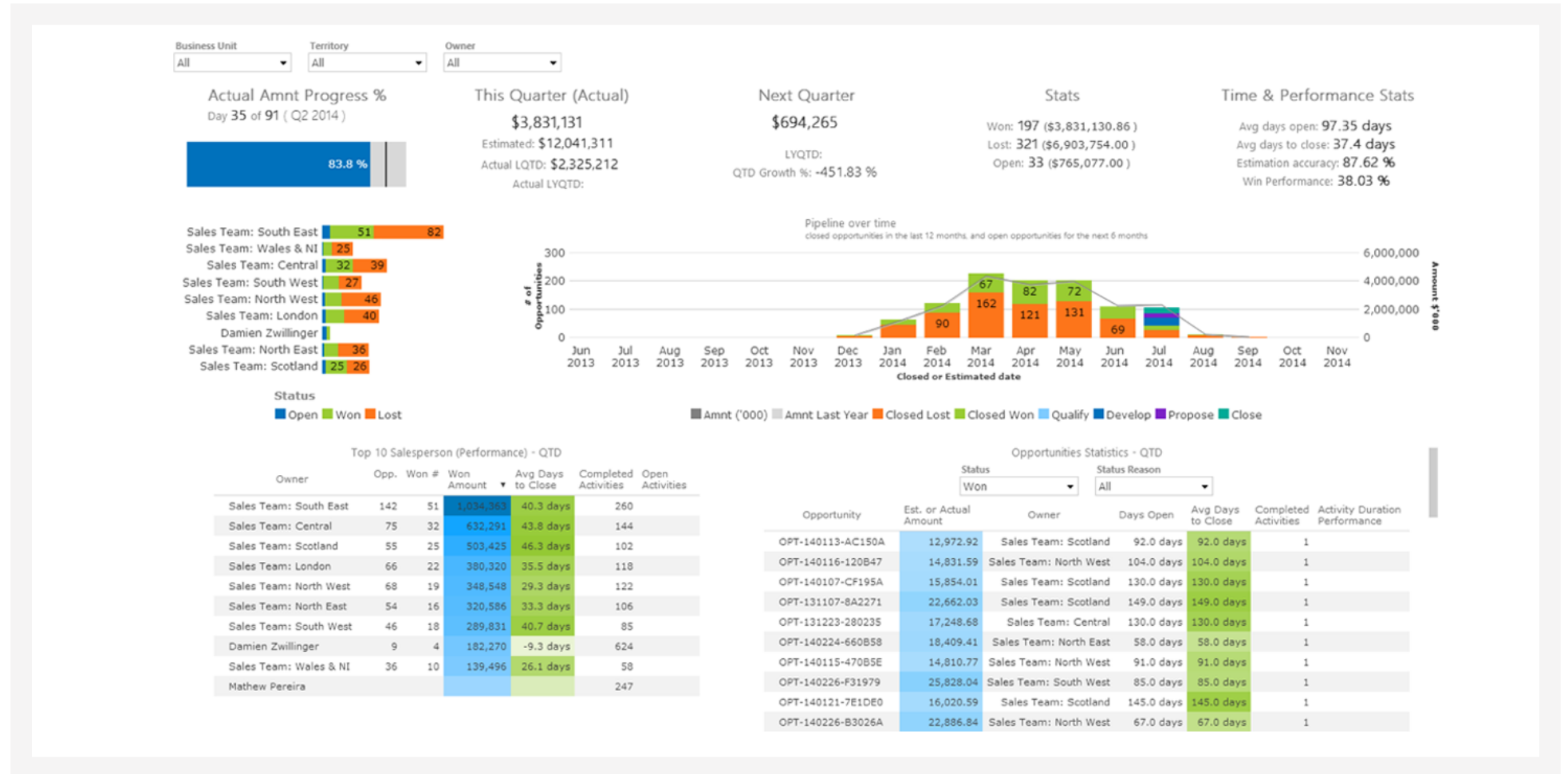
Audience

- Sales Manager
- Sales Representative

Business outcomes

- Monitor performance against target
- Track KPIs such as win-loss ratio
- Identify key revenue trends
- Track opportunities, quotes, and orders

Sales Representative dashboard



Sales Representative key metrics

OPPORTUNITIES

- **Analysis and charts**

- Opportunity Analysis Accuracy by Owner
- Opportunity Analysis by Owner
- Opportunity Analysis by Product Type
- Opportunity Analysis by Top 10 Opportunities
- Opportunity Estimated Open Revenue by Rating
- Opportunity by Pipeline Stage
- Opportunity by Pipeline Stage and Month
- Opportunity by Status
- Opportunity by Status and Month

- **Dashboard**

- Opportunity Dashboard

- **KPIs**

- Opportunity Accuracy
- Opportunity Average Days Close
- Opportunity Average Days Open
- Opportunity Count—Less is Better
- Opportunity Count—More is Better
- Opportunity Win %

- **Scorecard**

- Opportunity scorecard

QUOTES

- **Analysis and charts**

- Quote Analysis by Account Type & Status
- Quotes Analysis by Product Type
- Quote Win % by Top 10 Owners
- Quotes by Status

- **Dashboard**

- Sales Manager Dashboard

- **Scorecard**

- Opportunity Dashboard

ORDERS

- **Analysis and charts**

- Orders Analysis by Account Type & Status
- Orders Analysis by Product Type
- Orders by Status

- **Dashboard**

- Quotes and Orders Dashboard

- **Scorecard**

- Sales Manager Scorecard

INVOICES

- **Analysis and charts**

- Invoice Analysis by Outstanding Customer

- **Accounts**

- Invoice Analysis by Product
- Invoice Analysis by Territory
- Invoice Analysis by Top 10 Customer Accounts

- **KPIs**

- Invoice Average Amount
- Invoice Product Revenue
- Invoice Revenue

Chief Marketing Officer

Measuring and monitoring campaign effectiveness and ROI ensures marketing campaigns are effective and under tight cost control. This allows the Chief Marketing Officer to make the best possible decisions when it comes to investing marketing budget in particular channels and industries so as to hit objectives and generate the most leads and ROI.

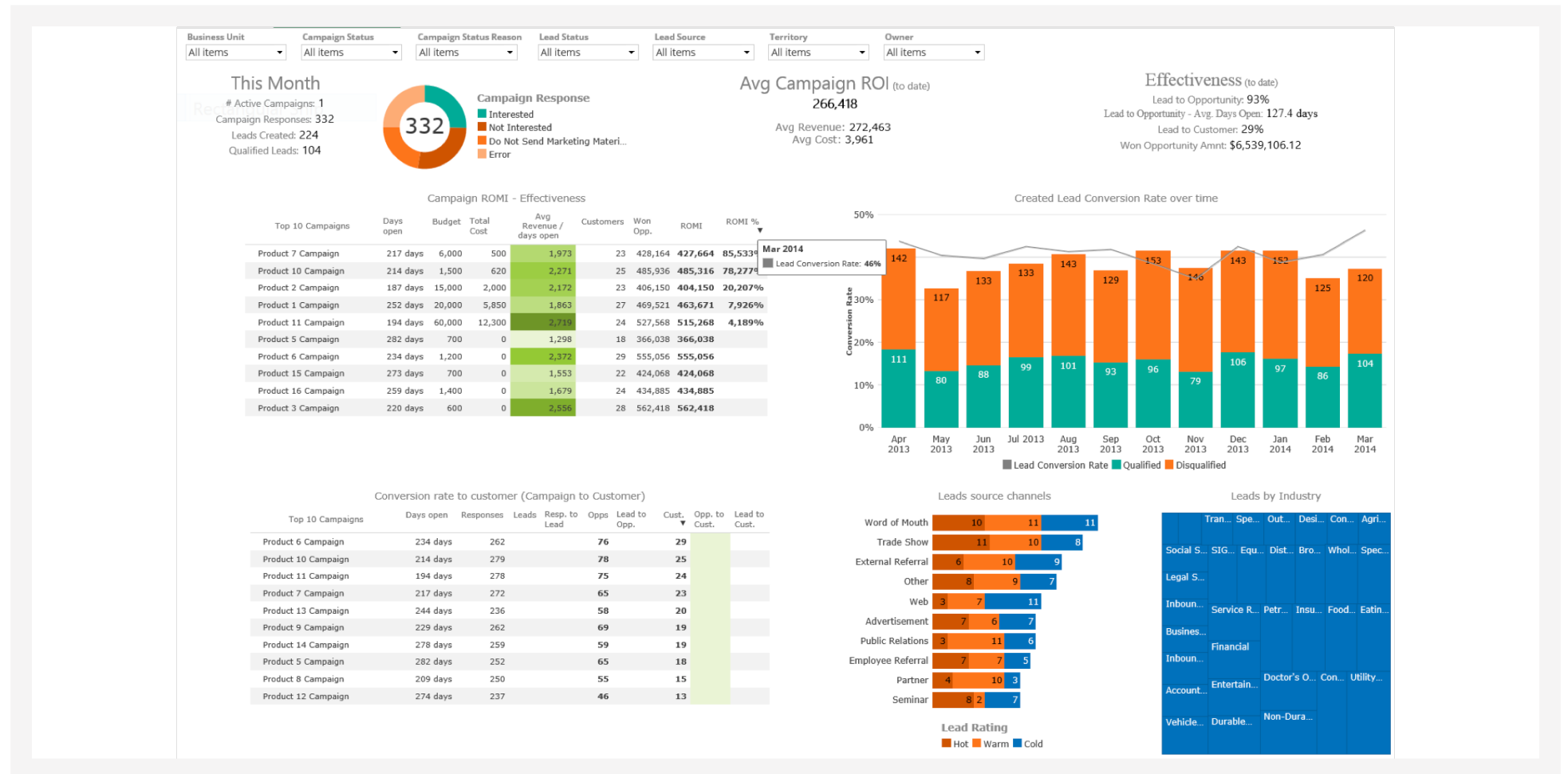
Audience

- Chief Marketing Officer
- Senior business managers
- VP Sales

Business outcomes

- Monitor performance against target
- Track KPIs such as lead to opportunity
- Identify key lead sources
- Track cost and ROI

Chief Marketing Officer dashboard



Marketing Manager

Marketing Managers can track campaign performance from lead generation through to revenue, following leads as they move from opportunities to closed sales and revenue. At a more detailed level, campaign duration, percentage of qualified leads, campaign activities and responses can be analyzed.

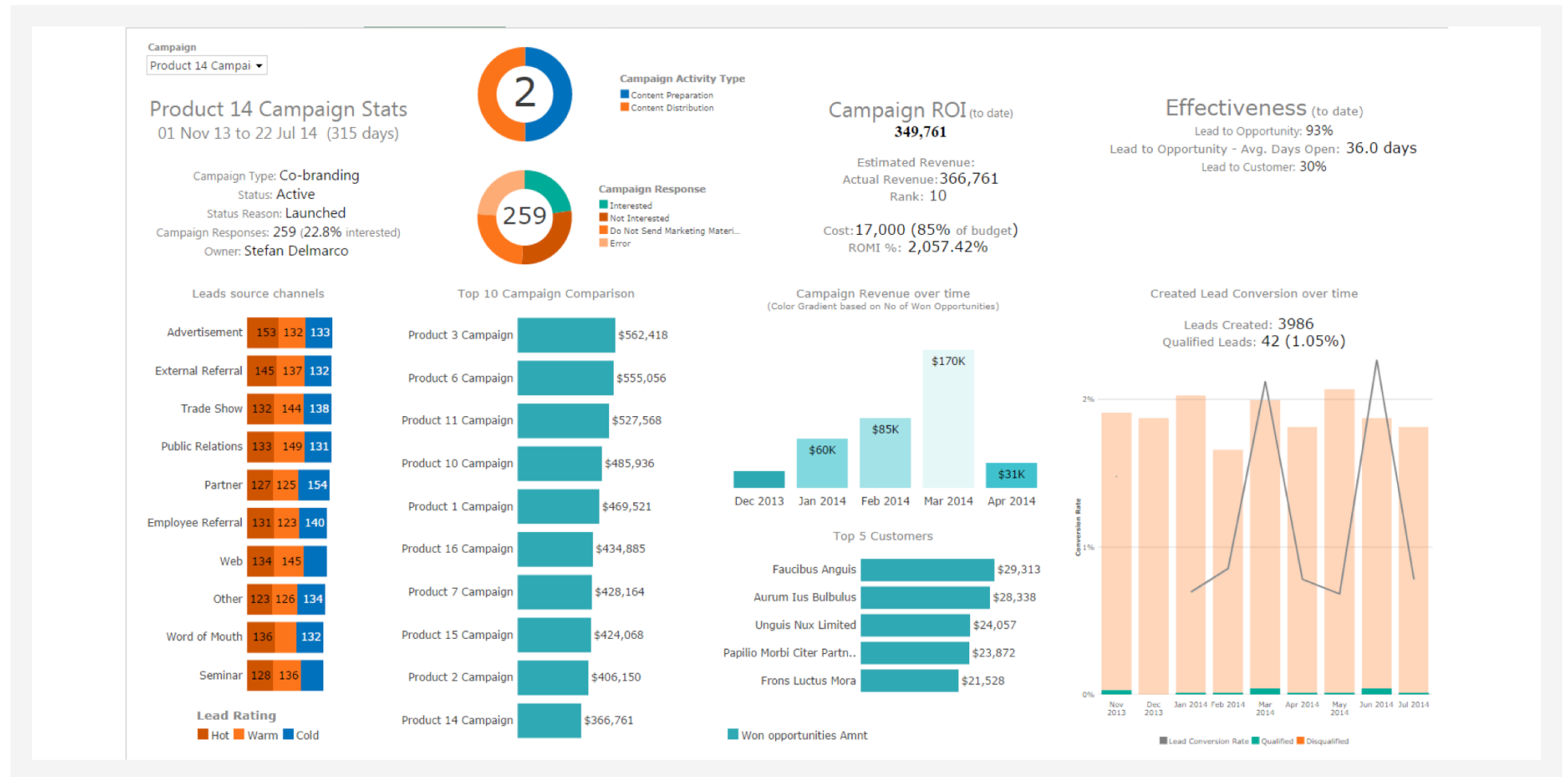
Audience

- Chief Marketing Officer
- Marketing Manager

Business outcomes

- Monitor campaign performance
- Track KPIs such as lead-to-opportunity
- Identify most effective lead sources

Marketing Manager dashboard



Marketing key metrics

LEADS

- **Analysis and charts**
 - Leads Analysis by Source & Rating
 - Leads Analysis Open by Campaign
 - Lead Conversion Ratio by Owner
 - Lead Conversion by Top 10 Owners
 - Leads Analysis Open by Owner
 - Leads Count by Status
 - Leads Created Across Months
- **Dashboard**
 - Leads Dashboard
- **KPIs**
 - Lead Conversion %
 - Leads Count—Less is better
 - Leads Count—More is better
 - Leads Neglected % CY
 - Leads New
- **Scorecard**
 - Leads Scorecard

CAMPAIGNS

- **Analysis and charts**
 - Campaign Analysis by Type/Channel
 - Campaign Cost Variations
 - Campaign Effectiveness
 - Campaign Performance by Type
 - Campaign Responses by Channel
 - Campaign ROMI by Type
- **Dashboard**
 - Campaign Dashboard
- **KPIs**
 - Campaign Cost % of Budget
 - Campaign Expenditure
 - Campaign Response Accuracy
 - Campaign ROI

Vice President of Customer Services

Customer service leaders use this dashboard to see progress and status of outstanding cases, customer satisfaction, and performance. KPIs for key accounts with high service levels which are important to executives are also included.

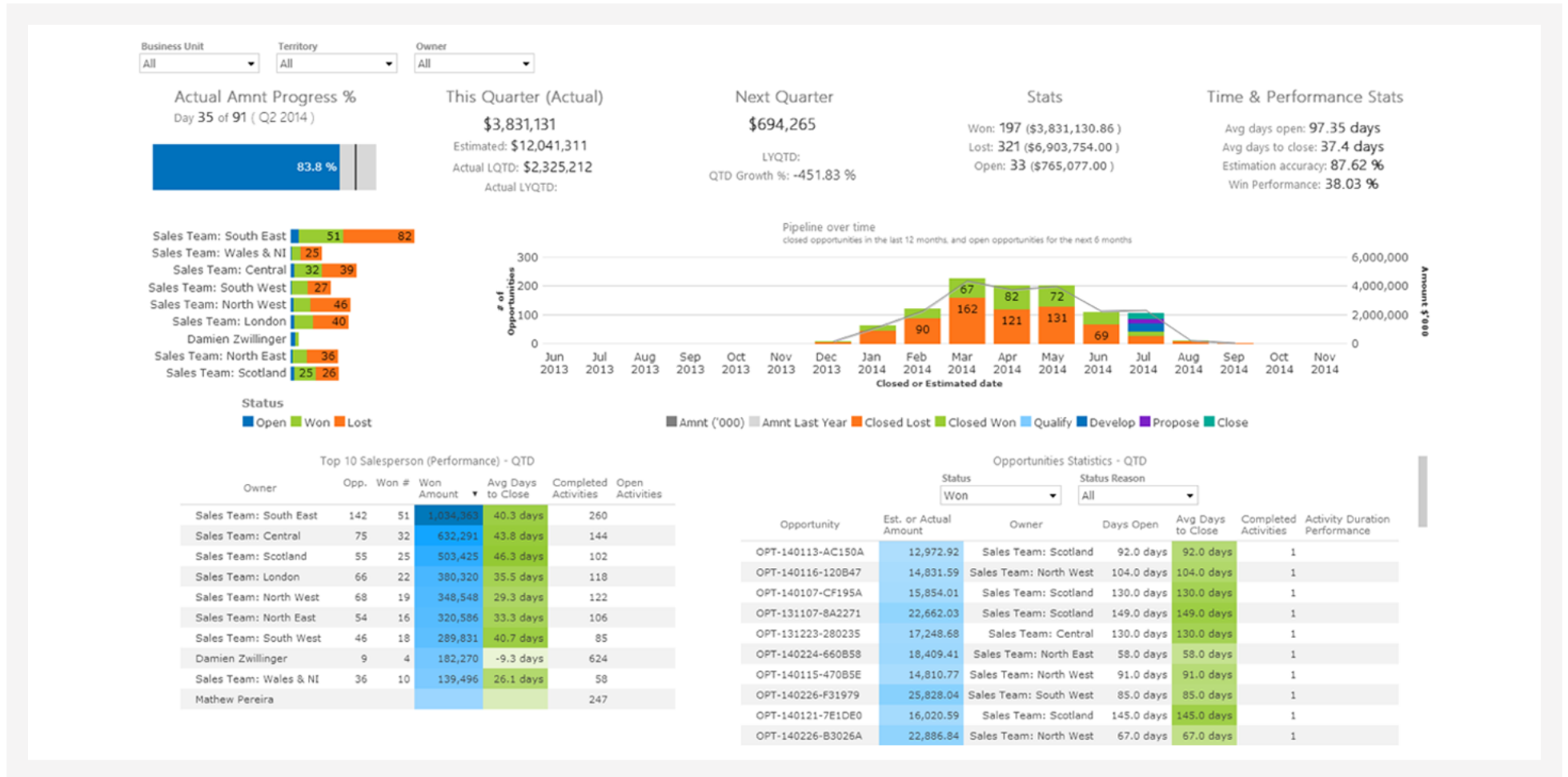
Audience

- Vice President of Customer Services
- Senior business managers

Business outcomes

- Monitor customer satisfaction
- Track KPIs such as average days open
- Identify issues at customer account level

Vice President of Customer Services dashboard



Customer Service Manager

This dashboard focuses on weekly activities so that Customer Service Managers can effectively monitor and have visibility over case status and progress by team and agent, while also analyzing time and performance KPIs.

Audience

- Vice President of Customer Services
- Customer Service Manager

Business outcomes

- Monitor backlog
- Track KPIs such as average days open
- Uncover issues at customer account level
- Recognize top performing agents

Customer Service Manager dashboard



Customer Service Agent

The Customer Service Agent dashboard focuses on the day-to-day operations for customer service employees responsible for following up and resolving cases. It includes KPIs for customer service agents provides them with a understanding of performance while enabling them to identify and react quickly to customer needs.

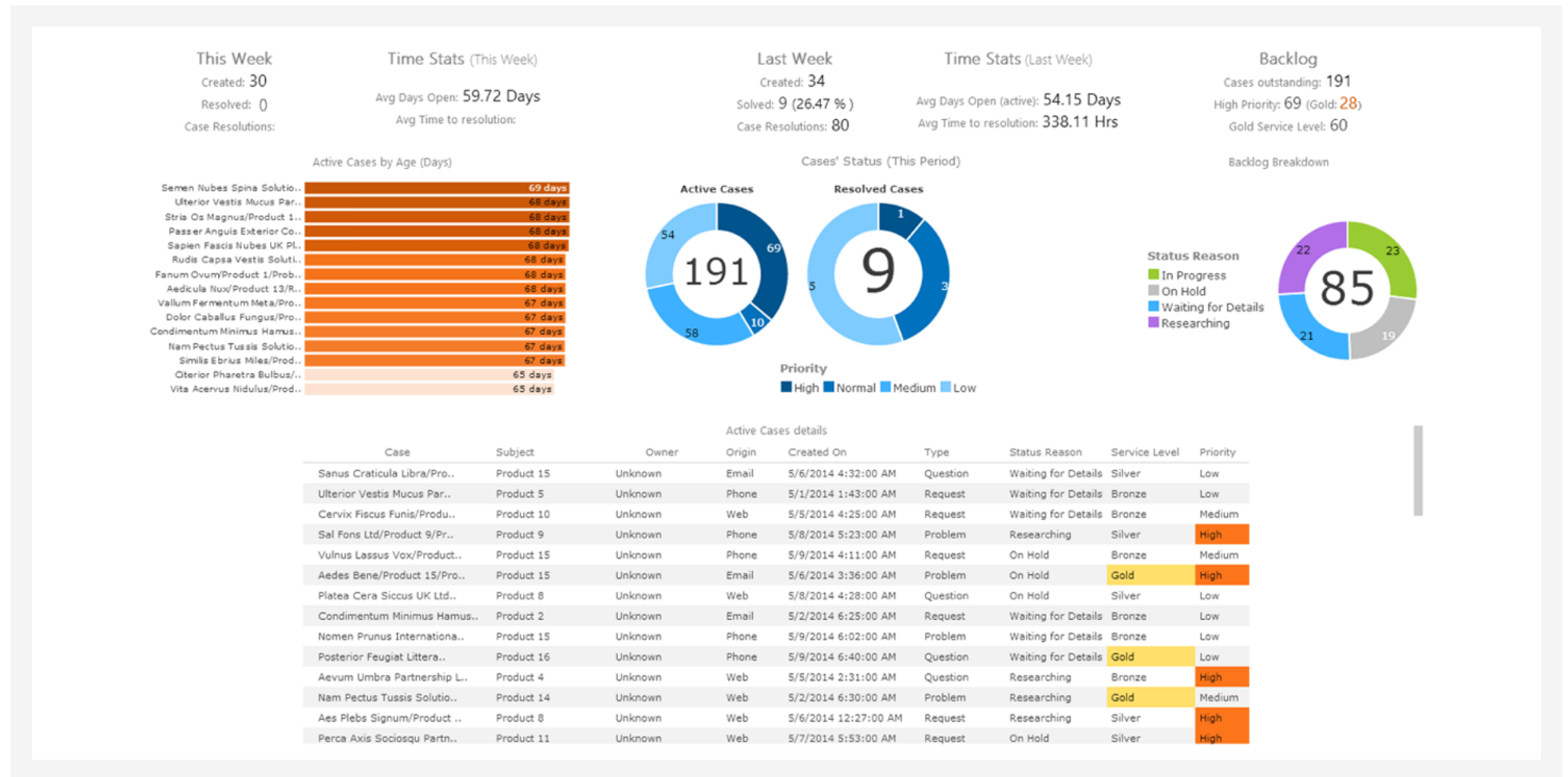
Audience

- Customer Service Manager
- Customer Service Agent

Business outcomes

- Monitor active cases days open
- Easy access to active case details
- See active cases by status reason

Customer Service Agent dashboard



Service key metrics

ACTIVITIES

- **Analysis and charts**
 - Activity Count by Type & Status
 - Activity Duration Analysis by Type
 - Activity Duration Analysis by Type Chart
 - Activity Open by Owner
 - Activity Open by Priority
 - Activity Open by Type
- **Dashboards**
 - Activity Open Dashboard
 - Activity Type Dashboard
- **KPIs**
 - Activity Actual vs Budget Duration
 - Activity Count New
 - Activity Count Open
- **Scorecard**
 - Activity Scorecard

CASES

- **Analysis and charts**
 - Case Count by Status, Priority & Satisfaction
 - Case Load Analysis by Owner
 - Case Resolution On-Time Analysis by Subject
 - Case Resolution by Priority & Satisfaction
 - Case Count by Status
 - Case Count by Type & Month
- **Dashboard**
 - Case Dashboard
- **KPIs**
 - Case Average No of Activities
 - Case Count Active
 - Case Count Open
 - Case Resolution %
 - Case Resolution Average Time
 - Case Resolution Customer Satisfaction %
 - Case Resolution On-Time Performance
- **Scorecard**
 - Case Scorecard

CONTRACTS

- **Analysis and Charts**
 - Contract by Account Territory & Status
 - Contract by Owner & Status

To learn more about ZAP Data Hub, please visit:
www.platformtechnologyadvisors.com. If you would like to schedule a meeting with a ZAP expert, please call us at **1-805-569-9487**.

About ZAP

ZAP is a global software company headquartered in London. It is a Microsoft Gold Partner, Tableau Technical Partner and Sage Rock Star ISV, as well as a PASS Knowledge Partner, and Power BI User Group partner. Analyst firm IDC highlights ZAP's ability to "fast-track the time and effort involved in kick-starting a data warehousing and BI project." Its software is used across all industry sectors with customers including Aston Martin, Costa Coffee, Regal Entertainment Group, Saniflo, and Tarmac.

