





Customer

Marketing

Accounting

Underwriting

Claims

Reinsurance

Actuarial

HR





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Segmentation

Profitability / CLV

Loyalty Retention & Churn

Product Affinity

Online Analysis

- ▶ Customers Segmented by Age Group
- ▶ Customers Segmented by Product Type
- ▶ Customers Segmented by Geography
- ▶ Customers Segmented by Channel Type
- ▶ Customers Segmented by Premium Amount



INSURANCE



HEALTHCARE



TELECOM



RETAIL

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Segmentation

Profitability / CLV

Loyalty Retention & Churn

Product Affinity

Online Analysis

- ▶ Valuable Customer Over Geography
- ▶ Customer Gain Ratio
- ▶ Customer Count by Geography
- ▶ Customer Revenue over Product Types
- ▶ Profitable product / customer over geography , agency , customer segment etc
- ▶ Top 5 LTV Customers
- ▶ Products of LTV Customers
- ▶ Geography Spread of LTV Customers



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Product Affinity

Online Analysis

- ▶ Churn Rate by Product Type
- ▶ Churn Rate by Age bracket
- ▶ Churn Rate by LOB



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Product Affinity

Online Analysis

- ▶ Measure Buying patterns and customer choices
- ▶ Product Bundling Analysis



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Loyalty Retention & Churn

Product Affinity

Online Analysis

- ▶ Buying patterns of online customers
- ▶ Number of online customers over geography
- ▶ Revenue of online customers over geography
- ▶ Top 5 products purchased by online customers over geography



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Sales Monitoring

Distribution Channel Analysis

Campaign Effectiveness

Cross Sell / Up Sell

Control lapse and attrition

Target Marketing



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Sales Monitoring

Distribution Channel Analysis

Campaign Effectiveness

Cross Sell / Up Sell

Control lapse and attrition

Target Marketing

- ▶ Monitor premiums, new premiums, average premiums, sums insured, commissions, no of policies, new policies, clients and agents
- ▶ Sales trend analysis over time
- ▶ Predictive trends
- ▶ Policy Status Based monitoring



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Sales Monitoring

Distribution Channel Analysis

Campaign Effectiveness

Cross Sell / Up Sell

Control lapse and attrition

Target Marketing

- ▶ Sales Volume Analysis
- ▶ Sales Growth and Lapses
- ▶ Commission Ratios by Agent, branch office, distribution channels



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Sales Monitoring

Distribution Channel Analysis

Campaign Effectiveness

Cross Sell / Up Sell

Control lapse and attrition

Target Marketing

- ▶ Campaign revenue over geography linked to products sold
- ▶ Campaign rating / feedback over geography
- ▶ Campaign Cost spent over geography



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Distribution Channel Analysis

Campaign Effectiveness

Cross Sell / Up Sell

Control lapse and attrition

Target Marketing

- ▶ Client based cross sell / upsell
- ▶ Policy based cross sell / upsell



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Distribution Channel Analysis

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Control lapse and attrition

Target Marketing

- ▶ Loss of revenue due to policies not renewed
- ▶ Lapse ratio by product and distribution channel
- ▶ Attrition Measurement



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Distribution Channel Analysis

Campaign Effectiveness

Cross Sell / Up Sell

Control lapse and attrition

Target Marketing

- ▶ Recommended products to customers based on age group
- ▶ Recommended products to customers based on geography sales
- ▶ Recommended products to be sold by agents based on information intelligence



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Budgeting

Daily Profit / Loss Analysis

Profit / Loss Analysis

Statutory Reporting

Asset Liability Analysis



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Budgeting

Daily Profit / Loss Analysis

Profit / Loss Analysis

Statutory Reporting

Asset Liability Analysis

▶ Budgeted V/s Actual expenditure for campaigns, underwriting expenses, commissions



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Budgeting

Daily Profit / Loss Analysis

Profit / Loss Analysis

Statutory Reporting

Asset Liability Analysis

▶ Daily profit / loss statement wrt current quarter



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Budgeting

Daily Profit / Loss Analysis

Profit / Loss Analysis

Statutory Reporting

Asset Liability Analysis

▶ Reports to determine business profitability by using various dimensions such as product line, geo, branch office, client type and policy issue year



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Budgeting

Daily Profit / Loss Analysis

Profit / Loss Analysis

Statutory Reporting

Asset Liability Analysis

▶ Financial performance reports to regulators



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Budgeting

Daily Profit / Loss Analysis

Profit / Loss Analysis

Statutory Reporting

Asset Liability Analysis

- ▶ Analyze insurance company asset risks for change in economic conditions like interest rate, share market conditions etc
- ▶ Prediction techniques for predicting liquidity required based on economic conditions



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring

▶ Calculation of Loss Ratio, loss frequency, burning cost and risk cost per policy. These are key inputs for underwriting



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring

- ▶ Client level profitability reports
- ▶ Insurance product wise report over time
- ▶ Client claim frequency based on products



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring

► Profitability analysis of product by section / cover



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring

- ▶ Premium performance over product
- ▶ Premium performance over geography
- ▶ Premium performance over channel



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring

► Premium revenue v/s costs over product



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Profitability monitoring

Client level Analysis and Reporting

Product Section Analysis

Premium Analysis

Loss Analysis

Rate Monitoring

- ▶ Average rate monitoring over product over time
- ▶ Premium rate measurement



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation

- ▶ Measuring opening, closing and re-opening of claims, claim payments and outstanding claim reserves
- ▶ Measurements of claim type by day



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation

► Claim Analysis for indemnity payments, claim expense payments, deductibles, collected deductibles and subrogation collections.



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation

- ▶ Payments Analysis with service providers. Service providers like medical centers and clinics, auto repair shops, lawyers and claim adjusters.
- ▶ Claims activity analysis with Claim parties like other insurance companies, port authorities and social benefit institutions.



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation

▶ Claim reserving Analysis
Measurement of run – off, ultimate claim costs compared to reserves



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation

- ▶ Detect suspicious claims
- ▶ Monitor claims activity and highlight exceptions



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Activity monitoring

Elements Analysis

Service Providers & Claim Parties

Run off Analysis

Fraud Detection

Claims Estimation

▶ Data mining models for arriving at claims estimation for new product launches



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Exposure monitoring

High Value Risks

Cession profitability

Information Management



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Exposure monitoring

High Value Risks

Cession profitability

Information Management

► Catastrophe – prone insurance portfolio analysis by sum insured, zone and underwriting year. Aggregation done at geography levels to determine exposure



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Exposure monitoring

High Value Risks

Cession profitability

Information Management

- ▶ Monitor high value target risks
- ▶ Monitor top insured values



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Exposure monitoring

High Value Risks

Cession profitability

Information Management

▶ Analyze reinsurance commission and agent commission difference



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Exposure monitoring

High Value Risks

Cession profitability

Information Management

- ▶ Info management for reinsurance renewals
- ▶ Details for reinsurance with sums insured and exposure by line, product and geography
- ▶ Prediction of reinsurance premium based on historical data



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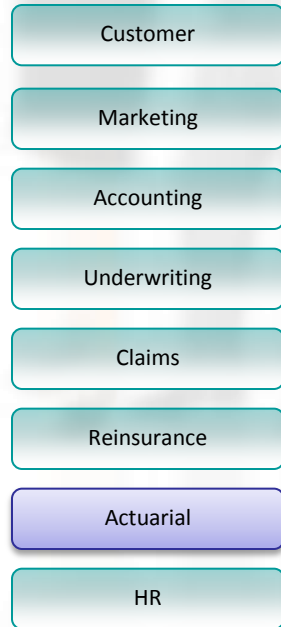
Reinsurance

Actuarial

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Claim Triangulations

Risk Analysis



- ▶ Claims over time analysis
- ▶ Reports like paid claims, incurred claims, number of claims and average claims
- ▶ Reports based on date, policy inception etc
- ▶ Chain ladder Actuarial Analysis for determining ultimate claim cost



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Claim Triangulations

Risk Analysis

- ▶ Predictive techniques for arriving at risk profiles of most valued customers
- ▶ Calculate Mean Claim Amount, claim frequency and loss ratios



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HR Reports & Analytics

Resource Allocation

Employee Portal

Training Requirements



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HR Reports & Analytics

Resource Allocation

Employee Portal

Training Requirements

- ▶ Staff movement & Performance Analysis
- ▶ Staff Attrition Analysis
- ▶ Compensation Analysis
- ▶ Department wise Analysis
- ▶ Prediction techniques



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HR Reports & Analytics

Resource Allocation

Employee Portal

Training Requirements

▶ Staff Allocation based on product launches



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HR Reports & Analytics

Resource Allocation

Employee Portal

Training Requirements

▶ 360 degree information and view on all HR activities



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HR Reports & Analytics

Resource Allocation

Employee Portal

Training Requirements

- ▶ Staff training and development requirements
- ▶ Capture training requirements



Clinical

Operational

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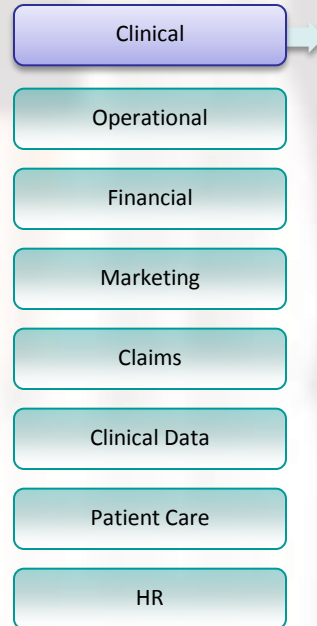
Marketing

Claims

Clinical Data

Patient Care

HR



- ▶ Hospital Incidents
- ▶ Death Rate
- ▶ Average cost per case
- ▶ Clinical outcomes
- ▶ Cost and clinical data
- ▶ Cost effectiveness
- ▶ Disease management
- ▶ In-patient admission rates
- ▶ Investment in research programs
- ▶ Number of procedures vs. benchmark
- ▶ Patient safety and staffing
- ▶ Performance reporting
- ▶ Population risk
- ▶ Resource consumption vs. benchmark
- ▶ Response times
- ▶ Treatments



Clinical

Operational

Financial

Marketing

Claims

Clinical Data

Patient Care

HR

- ▶ Patient Wait Time
- ▶ Medication Error
- ▶ Average Length of stay
- ▶ Average daily census
- ▶ Outpatient visits
- ▶ Inpatient days
- ▶ Cost of medications prescribed
- ▶ Cost of procedures employed
- ▶ Cycle times
- ▶ Labor utilization
- ▶ Supplies utilization
- ▶ Case mix adjusted utilization rate
- ▶ Payer contract development vs. plan
- ▶ Percent of board certified surgeons
- ▶ Strategic skill rating
- ▶ Percent of staff received Six Sigma training
- ▶ Employee satisfaction survey
- ▶ Employee productivity
- ▶ Forecast capacity and staffing



Clinical

Operational

Financial

Marketing

Claims

Clinical Data

Patient Care

HR

- ▶ % Claims Paid
- ▶ Revenue Per Physician
- ▶ Reimbursement per Physician
- ▶ Revenue Profit Margin
- ▶ Clinical cost reimbursement
- ▶ AR aging days
- ▶ Diversion hours due to physician non-availability
- ▶ Overtime hours
- ▶ Test errors expenses
- ▶ Percent of in-patient capitated revenue
- ▶ Percent of in-patient commercial revenue
- ▶ Percent of in-patient HMO revenue
- ▶ Percent of in-patient Medicaid revenue
- ▶ Percent of in-patient revenue
- ▶ Percent of in-patient self-pay revenue
- ▶ Percent of out-patient Medicaid revenue
- ▶ Percent of out-patient revenue
- ▶ Average occupation time of hospital bed



Clinical

Operational

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Marketing

Claims

Clinical Data

Patient Care

HR

- ▶ Acquisition
- ▶ Advertising budget per procedure
- ▶ Average visit length to Website
- ▶ Brand management
- ▶ Churn analysis
- ▶ Customer profitability
- ▶ Customer segmentation
- ▶ Demographic analysis
- ▶ Loyalty programs
- ▶ Market share by business
- ▶ Market share by customer
- ▶ Market share by patient
- ▶ Marketing focus group scores
- ▶ Number of visits to Website
- ▶ Patient satisfaction
- ▶ Physician practices
- ▶ Preferences and permissions bundling
- ▶ Retention
- ▶ Service and transaction history



Clinical

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Claims

Clinical Data

Patient Care

HR

- ▶ Allowable charges
- ▶ Amount of reimbursements
- ▶ Average length of stay
- ▶ Average paid per admission
- ▶ Balance
- ▶ Benefits paid as percent of allowable
- ▶ Call times
- ▶ Call volumes
- ▶ Complaint logs
- ▶ Co-pay
- ▶ Enrollment
- ▶ Inpatient paid per employee
- ▶ Inpatient paid per member
- ▶ Number of reimbursements
- ▶ Opt-outs

- ▶ Outpatient paid per employee
- ▶ Outpatient paid per member
- ▶ Percent of first-time accurate claims
- ▶ Percent of fraudulent claims
- ▶ Percent paid out-of-network
- ▶ Plan comparison
- ▶ Prescription utilization
- ▶ Response times
- ▶ Time spent on claim review



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Clinical Data

Patient Care

HR

- ▶ Hospital Incidents
- ▶ Death Rate
- ▶ Average cost per case
- ▶ Clinical outcomes
- ▶ Cost and clinical data
- ▶ Cost effectiveness
- ▶ Disease management
- ▶ In-patient admission rates
- ▶ Investment in research programs
- ▶ Number of procedures vs. benchmark
- ▶ Patient safety and staffing
- ▶ Performance reporting
- ▶ Population risk
- ▶ Resource consumption vs. benchmark
- ▶ Response times
- ▶ Treatments



Clinical

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Clinical Data

Patient Care

HR

- ▶ Attention to needs
- ▶ Clinical outcomes
- ▶ Days to next appointment
- ▶ Dispatch request and monitoring
- ▶ Interventions provided
- ▶ Overall satisfaction with patient care
- ▶ Patient functionality
- ▶ Patient wait time in admissions
- ▶ Patient wait time in pharmacy
- ▶ Percent care inpatient vs. outpatient
- ▶ Questions reporting
- ▶ Satisfaction with physician
- ▶ Service complaints
- ▶ Service level agreement (SLA) reporting
- ▶ Services performed
- ▶ Timeliness of services
- ▶ Trouble ticket resolution



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Patient Care

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- ▶ Advertising costs
- ▶ Cost of hires by source
- ▶ FTE utilization
- ▶ Number of new hires per day
- ▶ Number of online job applications
- ▶ Number of physician FTEs
- ▶ Number of pre-qualified candidates
- ▶ Number of requisitions
- ▶ Outside labor as percent of total
- ▶ Overtime costs
- ▶ Part-time FTEs as percent of total FTEs
- ▶ Percent of positions filled by onsite vs. off-site recruiters
- ▶ Percent of voluntary staff turnover
- ▶ Replacement viability
- ▶ Return on sourcing
- ▶ Salaries and benefits
- ▶ Search fees
- ▶ Staff satisfaction

- ▶ Time-to-fill (or time-to-hire)
- ▶ Turnover per manager
- ▶ Turnover per tenure
- ▶ Vacancy rate
- ▶ Weekly payroll



Revenue Management

Churn Management

Customer Segmentation

Customer Profitability



- ▶ Postpaid, Prepaid and In roamer Revenue for various call types
- ▶ Revenue, No. of times Downloaded
- ▶ ARPU
- ▶ AMPU
- ▶ Percentage of Validated Data
- ▶ Percentage of Customers Included to Reconciliation
- ▶ Percentage of Misaligned Data
- ▶ Percentage of Misaligned Customers
- ▶ Percentage of Customer Bills Adjusted
- ▶ Percentage of Unbilled and Under-billed Revenue
- ▶ Value of Unbilled and Under-billed Revenue
- ▶ Percentage of Billable xDRs Suspended or Errored
- ▶ Ratio of Billing xDRs to Network xDRs
- ▶ Percentage of Errored Activation and Service Orders
- ▶ Percentage of rd Party Settlements Verified and Accepted
- ▶ Value of Successfully Recovered, Processed and Billed xDRs
- ▶ Value of Unfilled Error Fixes Orders

Revenue Management

Churn Management

Customer Segmentation

Customer Profitability



- ▶ Churn Rate by LoB
- ▶ Churn Rate by Age Bracket
- ▶ Churn Rate by Product
- ▶ Churn Rate by MNP (Mobile Number Portability)
- ▶ Revenue (over one year) Recognized by Churned Customers by Market Geography
- ▶ Number of Days in Contract by Churned Customers by LTV Score
- ▶ Count of SMS Generated over One Year by Churned Customers
- ▶ Count of MMS Generated over One Year by Churned Customers
- ▶ Count of International Calls Generated over One Year by Churned Customers
- ▶ Count of National Calls Generated over One Year by Churned Customers

Revenue Management

Churn Management

Customer Segmentation

Customer Profitability



- ▶ Top n ISD / STD Customers
- ▶ Customer Gain Ratio
- ▶ No. of Inactive Customers
- ▶ Campaign Profitability
- ▶ Churn Rate
- ▶ Customer count by geography
- ▶ Number of Customers over selected handset
- ▶ Customer Revenue over LOB
- ▶ Customer Revenue over product
- ▶ Numbers of trouble ticket over geography
- ▶ Customer margin over LOB
- ▶ Customer cost over LOB
- ▶ Product usage over geography
- ▶ Product usage over occupation
- ▶ Process efficiency over product type
- ▶ Marketing action over geography
- ▶ Marketing action over product over cross selling
- ▶ Valuable customers on the network over geography
- ▶ Average contract months over geography

Revenue Management

Churn Management

Customer Segmentation

Customer Profitability

- ▶ Correctness of Customer Data
- ▶ Usage times of products
- ▶ feedback and suggestions on product
- ▶ collection over payment type
- ▶ Number of customer status changing to dunning over geography
- ▶ Range of customer payments



- ▶ Average revenue per user by geography
- ▶ Average margin per user by geography
- ▶ Negative operating income by geography
- ▶ Negative operating income by LTV
- ▶ Revenue by geography
- ▶ Margin by geography
- ▶ Average revenue per user by age group
- ▶ Average margin per user by age group
- ▶ Negative operating income by age group
- ▶ Revenue by LTV
- ▶ Revenue by age group
- ▶ Margin by age group
- ▶ Average revenue per user by product
- ▶ Average margin per user by product
- ▶ Negative operating income by product
- ▶ Margin by LTV
- ▶ Revenue by product
- ▶ Margin by product

Revenue Management

Churn Management

Customer Segmentation

Customer Profitability



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Store Operation

Supply Chain

HR



- ▶ Profit per Customer Visit
- ▶ Average order size per transaction
- ▶ Average sales per transaction
- ▶ Average number of items per transaction
- ▶ Average profit per transaction
- ▶ Number of trips per month
- ▶ Average shopping time
- ▶ Visit to buy ratio
- ▶ Customer Count by Geography
- ▶ Customer Revenue over Product Types
- ▶ Profitable product / customer over geography , agency , customer segment etc
- ▶ Top 5 LTV Customers
- ▶ Products of LTV Customers
- ▶ Geography Spread of LTV Customers
- ▶ Customers Segmented by Age,Product,Channel,Geography
- ▶ Churn Rate by Product, Age
- ▶ Measure Buying patterns and customer choices
- ▶ Product Bundling Analysis
- ▶ Buying patterns of online customers

- ▶ Number of online customers over geography
- ▶ Revenue of online customers over geography
- ▶ Top 5 products purchased by online customers over geography

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Sales

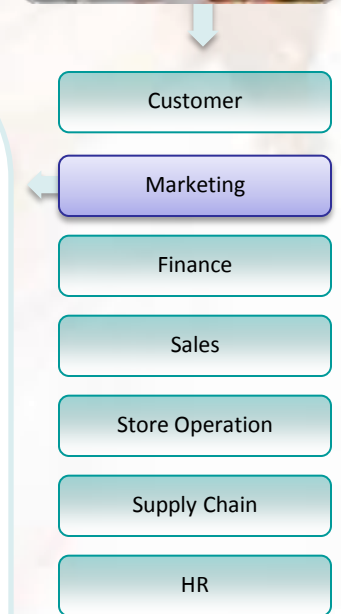
Store Operation

Supply Chain

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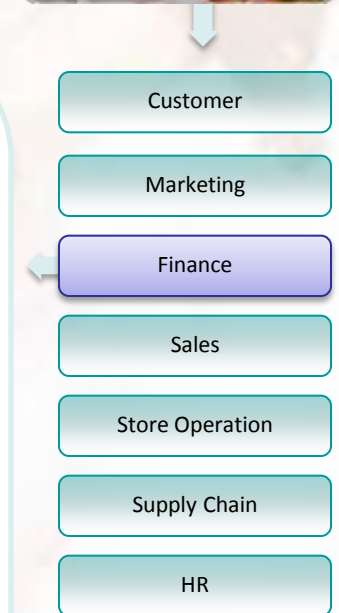


- ▶ Response rate
- ▶ Lead to pipeline ratio
- ▶ Lead to closed sales ratio
- ▶ Lead to pipeline conversion
- ▶ Marketing cost per lead per segment
- ▶ % of leads generated
- ▶ Marketing budget ratio
- ▶ Return on Marketing Investment (ROMI)
- ▶ Sales Volume Analysis
- ▶ Sales Growth and Lapses
- ▶ Inquiry growth following campaign
- ▶ Campaign revenue over geography linked to products sold
- ▶ Campaign rating / feedback over geography
- ▶ Campaign Cost spent over geography
- ▶ Client based cross sell / upsell
- ▶ Policy based cross sell / upsell
- ▶ Recommended products to customers based on age group
- ▶ Recommended products to customers based on geography sales
- ▶ Recommended products to be sold by agents based on information intelligence





- ▶ Total Sales
- ▶ Gross Profit Margin
- ▶ Price premium
- ▶ Actual expenses
- ▶ Total payable
- ▶ Total receivable
- ▶ Return on capital invested
- ▶ Margin %
- ▶ Markup %
- ▶ % of revenue generated from non-house brands
- ▶ % of profit generated from non-house brands
- ▶ % of revenue generated from house brands
- ▶ % of profit generated from house brands
- ▶ Budget variance
- ▶ Budgeted expenses
- ▶ Sales growth





- ▶ Sales Per Hour
- ▶ Average Sales per Sales Person
- ▶ Item Per Sale
- ▶ Conversion Rate
- ▶ Average Sales per Customer
- ▶ Sales per labor hour
- ▶ Coupon conversion percentage
- ▶ Shelf space profitability
- ▶ Promotion share
- ▶ No of transactions per hour
- ▶ Sales per Square Foot/Meter
- ▶ No of products per square Foot/Meter
- ▶ Revenue/Profit per square Foot/Meter
- ▶ Store conversion rate
- ▶ % of returning customer
- ▶ Fixed cost of opening per month
- ▶ Variable cost of opening per hour
- ▶ KWH per square foot

- ▶ Average time on shelf
- ▶ Average # of employees
- ▶ Wage to sales ratio

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- ▶ percentage (%) of total stock that is not displayed to customers
- ▶ Inventory Sales per selling hour
- ▶ Inventory Turns
- ▶ Inventory Store conversion rate
- ▶ Percentage of perishable items with past due date
- ▶ Product visibility on shelf
- ▶ Sales Product share on shelf
- ▶ Sales Gross Margin Return on Inventory Investment
- ▶ Average Inventory value
- ▶ Inventory Turnover
- ▶ Inventory to sales ratio
- ▶ % out of stocks item
- ▶ % of expired products
- ▶ % of not displayed inventory
- ▶ % of damaged products
- ▶ % of returned products
- ▶ Inventory carrying stock

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- ▶ Order fulfillment cycle time
- ▶ % of backorders
- ▶ % of time spent picking back orders
- ▶ Scrap (or leftover) value %
- ▶ Inventory Accuracy
- ▶ Inventory Carrying Costs
- ▶ Delivery Schedule Adherence
- ▶ Fill Rate
- ▶ Perfect Order Measure / Fulfillment
- ▶ % of backorders



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- ▶ Staff movement & Performance Analysis
- ▶ Staff Attrition Analysis
- ▶ Compensation Analysis
- ▶ Department wise Analysis
- ▶ Prediction techniques