



## IBM Power BI for CPG & Retail on Microsoft Surface™



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## Introduction

Resource intensive industries such as CPG and professional services have often been faced with the challenge of managing their staff and leveraging their people in the most efficient manner in order to capitalize on their talent and manage cost of employment. In fact, employees are often the biggest cost drivers for organizations in these industries. Yet, investing in talent is always a key priority for leaders.

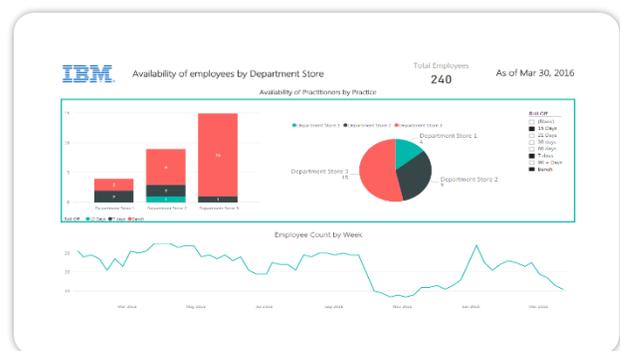
IBM – for example - has over 100,000 employees in its consulting practice Global Business Services (GBS) worldwide. Ensuring the availability and utilization of resources across each service line is a constant challenge to ensure projects have sufficient staff and that utilization is maximized to drive revenue for the company. IBM optimized this process using Power BI analytics app on Windows 10. The app brings the data and analytics closer to the decision maker by using Power BI's powerful dashboard capabilities on a mobile platform. This allowed resourcing managers to make real-time staffing decisions on an ad-hoc basis.

Given the parallels between the service and CPG and retail industries, IBM has taken this concept of managing and tracking shifts, employee efficiency and utilization to create an analytics-based solution for the CPG and retail industry using Power BI.

## The solution

This solution has been designed for CPG and retail organizations looking to achieve insights and drive business decisions that will optimize utilization of employee time to minimize costs and maximize productivity. The functionality can also be extended to other aspects of the industry such as product management, shrinkage and sales management.

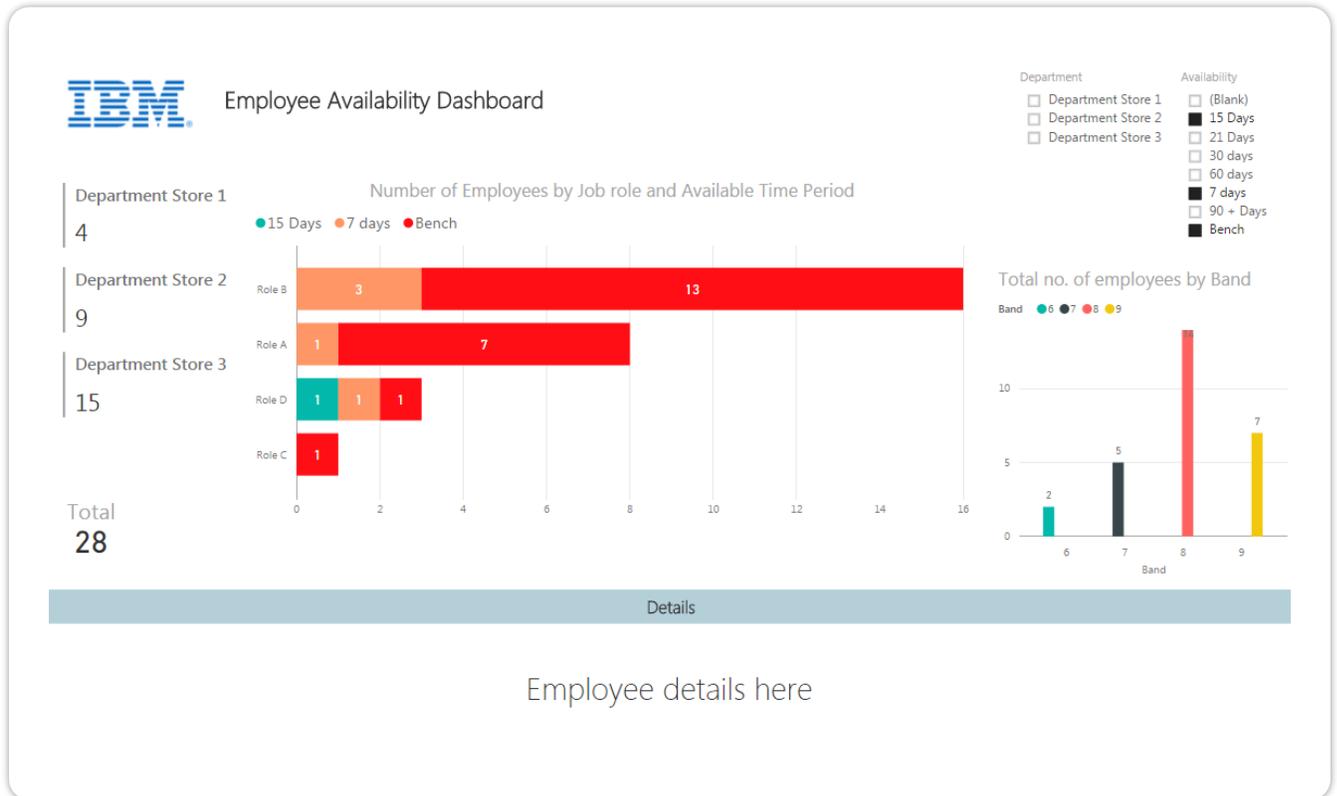
Power BI consumes organizational data and combines it with industry data into visualized diagrams and reports to provide insights to business users and to empower employees to make smarter decisions. For example, Power BI can increase the visibility of insights on shift tracking and employee utilization.



The POC involves a series of dashboards which display available or "idle" resources trends by week, year over year analysis of resources, breakdown of available resources by job role and level, projected utilization of resources and breakdown of utilization types, among other metrics.

This data is easily refreshed to present managers and even HR teams with real-time analytics. The sample data shown

below represents a subset of the worldwide data available.



## Power BI for the CPG & Retail Industry

Our solution can be extended far beyond resource and staff management. In essence, the solution can be easily customized and tailored to meet the individual analytics needs of each customer. Some of the other use cases include:

- Shrinkage Management
- Inventory Management
- Product Sales Management

For example, our solution can be extended to provide insights and analytics on the top-selling products based on shoppers' purchase information gathered in stores. Power BI can take sales data of items sold across different stores, generate visualized report to demonstrate trends and patterns of sales revenue, turnover rate and inventory over time based on the data been captured. This solution can be extended to forecast on demand to increase sales profitability and

operational efficiency. Any piece of data that has been captured by a retailer can be analyzed and multiple types of reports and dashboard can be created using the easy-to-use user desktop and web interface.

Moreover, IBM has the capability of combining Power BI with other Microsoft Dynamics solutions such as AX, CRM and Azure to help retailers better manage inventory and ordering system to make CPG business operate more effectively.

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## Technologies used

These dashboards are developed using the Power BI Desktop version and are natively rendered for multiple form-factors and devices, including all Windows 10 Surface Devices via the Power BI Gateway. The Power BI Gateway allows the solution to connect to on premise data sources for confidential employee data.



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## Business benefits

This dashboard reduces the time spent by resource staffing professionals who frequently prepare email reports, inefficiently coordinate shift tracking and present ad-hoc PowerPoint presentations to summarize the data held in multiple Excel spreadsheets on a weekly basis or even more frequently depending on the business unit and division. By presenting the data in a consolidated dashboard, the decision makers (such as Senior Managers,

Recruiting teams, HR, Executives and Senior Resource Staffing Professionals) are able to:

- 1) Quickly update/refresh data for the most up-to-date insights – this allows executives to base decisions on the most recent data instead of waiting on weekly reports to be generated, and sent to them via email. There is also a reduction in time spent creating reports, making time available to spend analyzing the insights – by automating the data

cleanup and consolidation through the Query Editor.

- 2) Tailored insights – The ability to drill into each tile and report within the Power BI dashboard allows each of the executives to more closely examine the metrics they were interested in as it aligns to their role, without having to create multiple reports or slides within a presentation to view slight variations of the same metrics. This also allows the details to be exported so that solutions could be actioned immediately.
- 3) Consistent reporting - the ability to filter holistically across a dashboard allows the various department managers within the company to utilize the same dashboards their own leaders were using for consistent comparison of metrics.



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