

CRM Analytics Dashboard

Migrated to QlikSense and split between Customer 360, new CRM quality and Opportunity dashboard



Process Owner

GBU Sales & Marketing / Finance

General Description

The Analytics Dashboard was developed alongside the CRM project and is designed to facilitate analysis and reporting of data related to the following areas:

Orderbook

Sales Performance (Actuals)

Overdue & DSO

Opportunities

CRM Quality

SPM

Solvay Report

Sold & Pending orders

Deployed GBU's with or without validated Margins:

- Novecare with Margin
- Peroxides with Margin for EMEA (not other zones)
- Special Chem with Margin
- Performance Polyamide (ex-EP only) with Margin
- Soda Ash without Margin
- Aroma Performance with Integrated Margin (not 100%, ok for Sales Analysis)
- Silica with Margin
- Coatis without Margin
- Fibras with Margin
- Performance Polyamide (ex-P&I only) with Margin

Tech Solutions with Margin (for zones on Solvay ERP)

Scope:

- Period - 3 calendar years
- Intra GBU sales are excluded for Aroma Performance and Fibras.
- Legal Entities - All except for Butachimie & Rhodia Manyar
- Order Type - "KB" excluded for Engineering Plastics
- Integrated Margin - For Engineering Plastics refer to its Market Margin

Flags:

Target Users

- Sales
- Marketing
- Controlling
- Supply Chain
- Quality

Authorization & Rights

All the accesses must be validated by:

[GBU CRM Champions](#)

or

Immediate Supervisor for Novecare GBU.

Margin data **MUST be validated by CRM Champions/Finance Directors**

Click here for the [Access Corporate Dashboard Access Request Form](#) to get access to Analytics.

Access Rights and Dashboard Entry Points - Click [here](#) for descriptions.

- **Consolidated Entities (Y/N)** - Consolidated entities now work as a regular QV Filter : nothing selected = all, Y = only consolidated entities, N = only non-consolidated entities.

For example, selecting (N) will show 100% sales, volumes and margins while selecting (Y) will consider the consolidation methods of each Legal Entity by multiplying the sales, volumes and margins by the Entity consolidation rate (eg. joint venture of 50%/50%, only 50% of sales will be shown in the analysis)

- **Intra GBU/External Flags:**

Comparison between selling and buying GBU (BW rule) :

Sales: External To Other Gbus Within Gbu (

- No buying GBU = External
- 2 distincts GBUs = To other GBUs
- Same GBU = Within GBU

To Other GBUs - Intra Sales flow to other GBUs can be viewed with this flag. **External** = Select this to view the final customer outside of Solvay. **Within GBU** - Intra GBU sales are available to be viewed by selecting the "Within GBU" flag. *Excluded automatically for Aroma Performance and Fibras.*

- **Margin Types** - Choose between: - [Contribution Margin](#)
- [Integrated Margin](#)
- [Integrated \(Market\) Margin](#) - [Gross Margin \(Novecare Only\)](#) - [Integrated Gross Margin \(Novecare Only\)](#)

Currencies and Exchange Rate:

- EUR, USD,
- Local Currency & Document Currency
- Conversion rate : Qlikview extracts all P&L data in local currency and applies the Exchange Rate- C from BW. This is a CAR3 Monthly Average Exchange Rate. See details [here](#).

Data Refresh Frequency:

- Data is refreshed on the Analytics dashboard daily. Full reloads of P&L are done each weekend. Data on Saturday and Sunday is not "current" due to refresh demands.
- Analysis for Orderbook, Sales, and Credit Management is available for 3 years worth of data: 2 Historical years and year to date of the current year.
- On Opportunities, Analysis is available for current year through the maturity year of the opportunity.

Sources for the dashboard include:

- Order Book: Global Sales BW, PPS BI4)
- Sales Performance: BW P&L
- Overdue and DSO: BW FIAR
- Quality: BW-SFDC Complaint Dashboard, CRM Salesforce
- Opportunities: CRM Salesforce

Useful links on General Information and Sources:

- [Source Queries Overview](#)
- [Dimension Dictionary](#)
- [Exchange Rates](#)
- [Margin Information](#)
- [Budget and BFR Information - OLD](#)
- [Forecast Data Source](#)
- [Access Rights and Dashboard Entry Points](#)
- [Validation Contacts and Data Stewards](#)
- [Bookmark Sharing Tips](#)

	Summary	Orderbook	Sales Performance	Overdues and DSO	Opportunities	Quality	SPM	Solvay Report	My Page
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KPIs	- Orderbook - Sales Flash - Top 5 products - Aged overdues - Top 5 opportunities pending - Top 5 opportunities closed	- Highlights - Report	- Highlights - Analysis - Commercial Roadmap - Report - Currency Report	- Current - Historical	- Business Analysis - Pipeline Efficiency - Pipeline Monitor - Report	- Complaints - Customer Requests - Samples	- Overview - Customer Market View - SPM Report	Solvay Report	My Page
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