

Transform Decision-Making with a Unified View of the Business

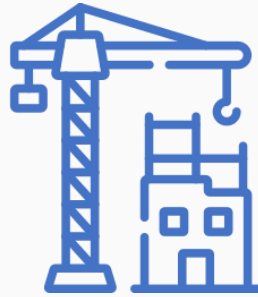


Perceptive**Analytics**

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Client Overview



Engineering Services
500 employees



Stakeholders

Objectives



Deliver a detailed company update to shareholders



Track financial performance of the company



Proactively identify downward trends

Benefits



Enhanced long-term strategic planning



Improved financial forecasting

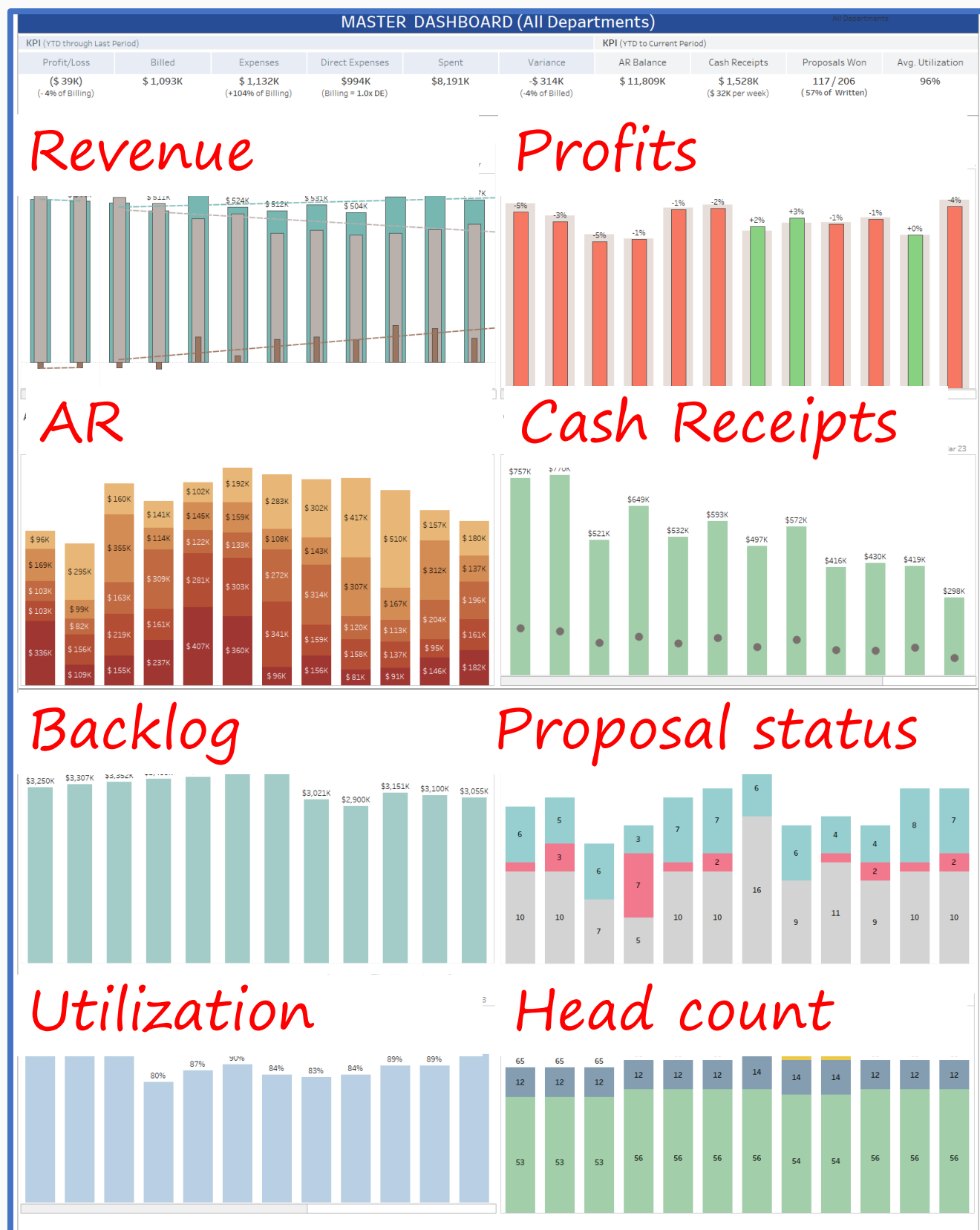


Early detection of organizational issues



Optimized efficiency of the company

This Master Dashboard gives a 360° view of the business



Get an overview of all the important KPIs

KPI (YTD through Last Period)						KPI (YTD to Current Period)			
Profit/Loss	Billed	Expenses	Direct Expenses	Spent	Variance	AR Balance	Cash Receipts	Proposals Won	Avg. Utilization
\$ 1,380K (+ 3% of Billing)	\$ 47,389K	\$ 46,009K (97% of Billing)	\$ 41,843K (Billing = 1.1x DE)	\$ 46,382K	\$ 1,007K (+2% of Billed)	\$ 5,434K	\$ 41,950K (\$1,049K per week)	117 / 206 (57% of Written)	96%

KPI (YTD through Last Period)

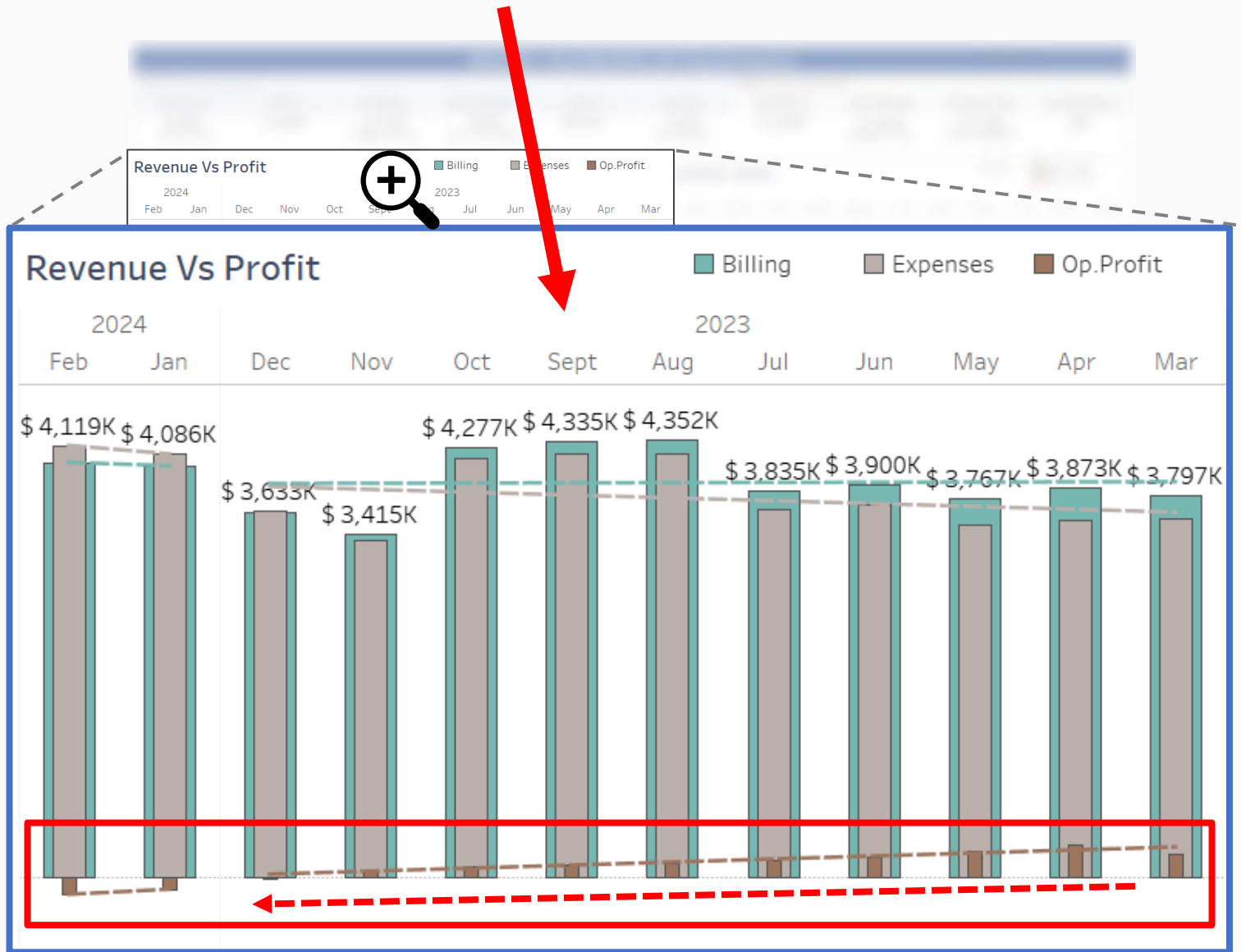
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Let's each KPI in detail >>

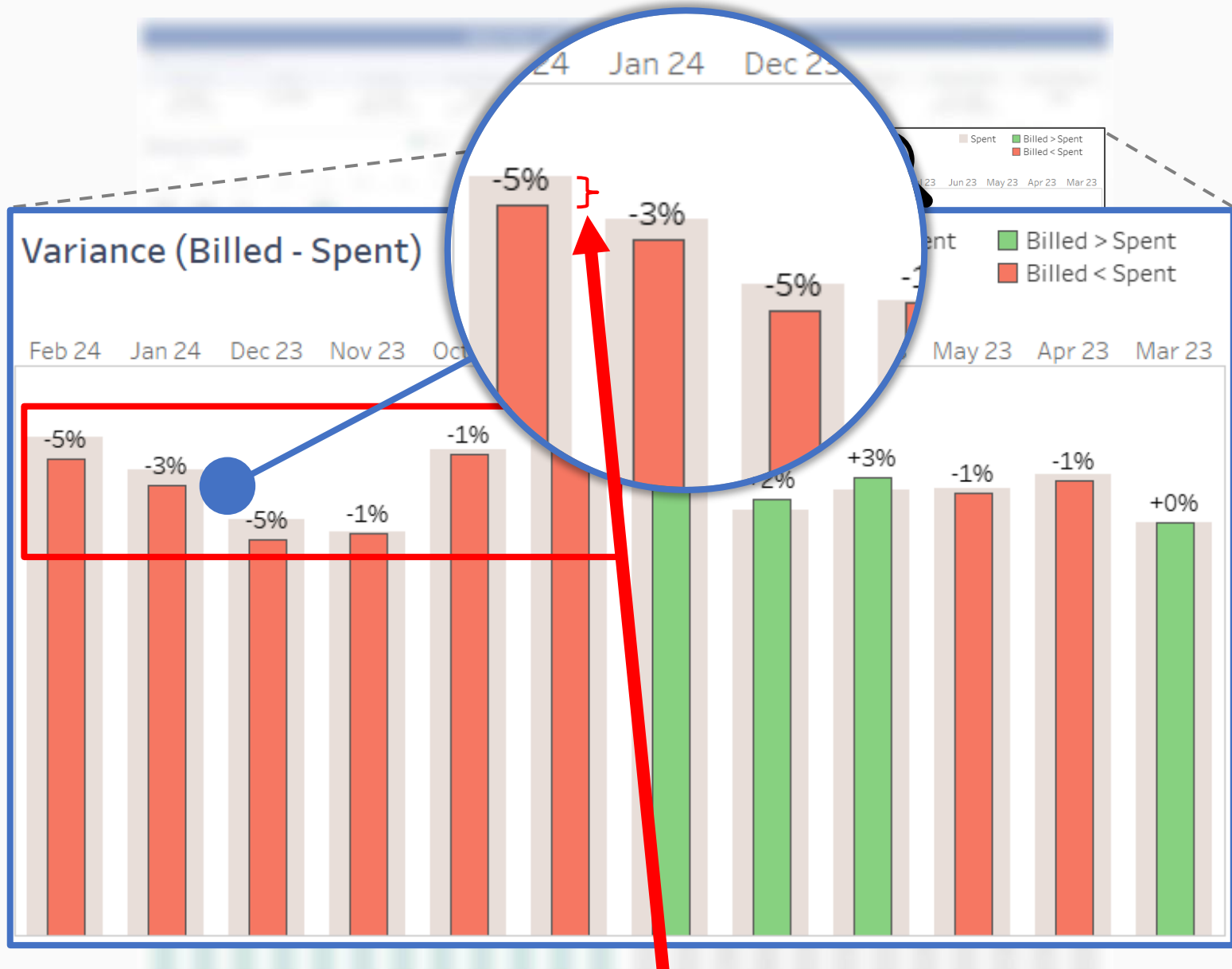
Here are the financials for the past one year



The operating profit has declined

Let's look at the next KPI >>

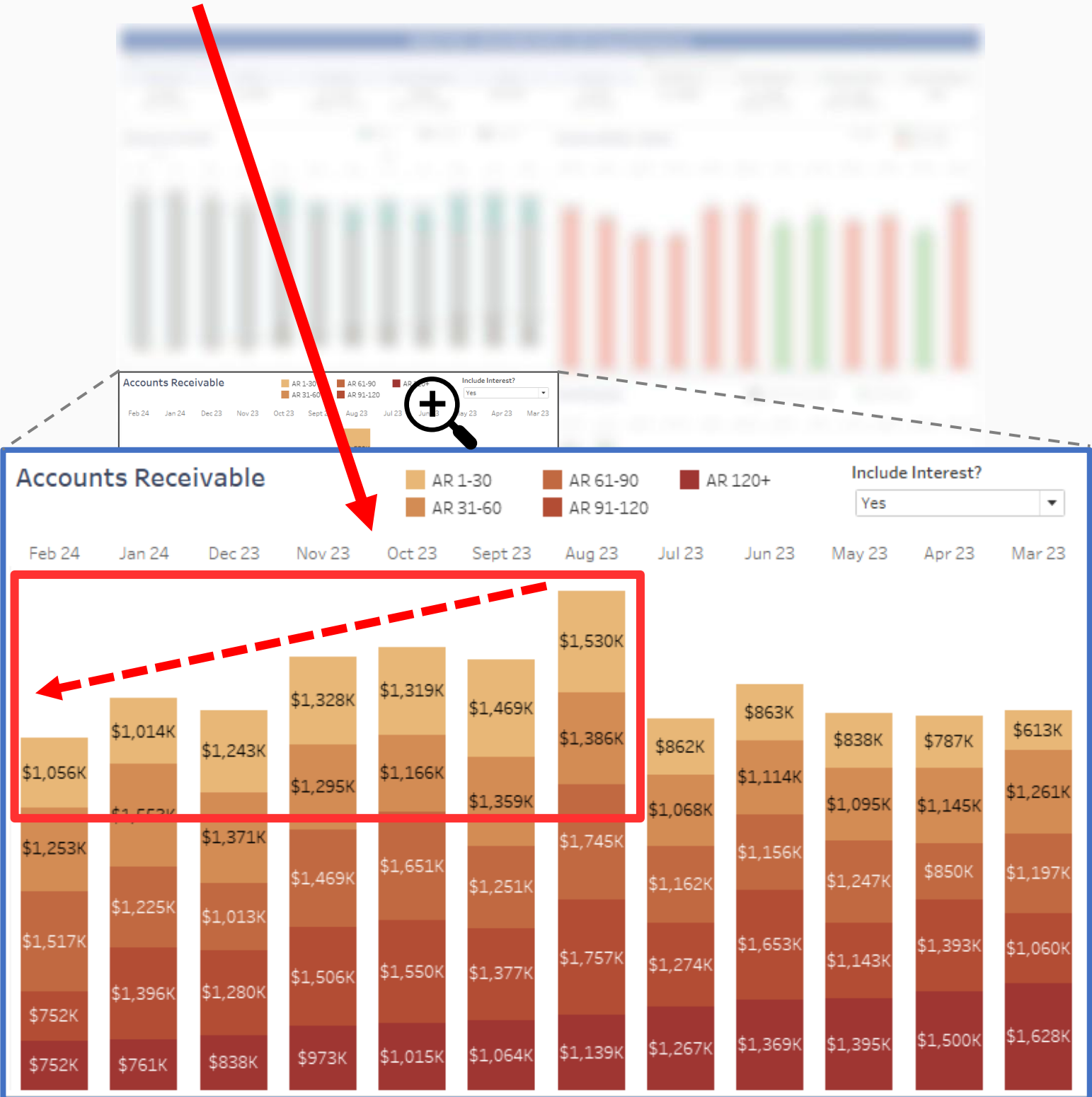
Compare the trend of
time spent with time billed



Billed is consistently less than
spent, indicating under-billing

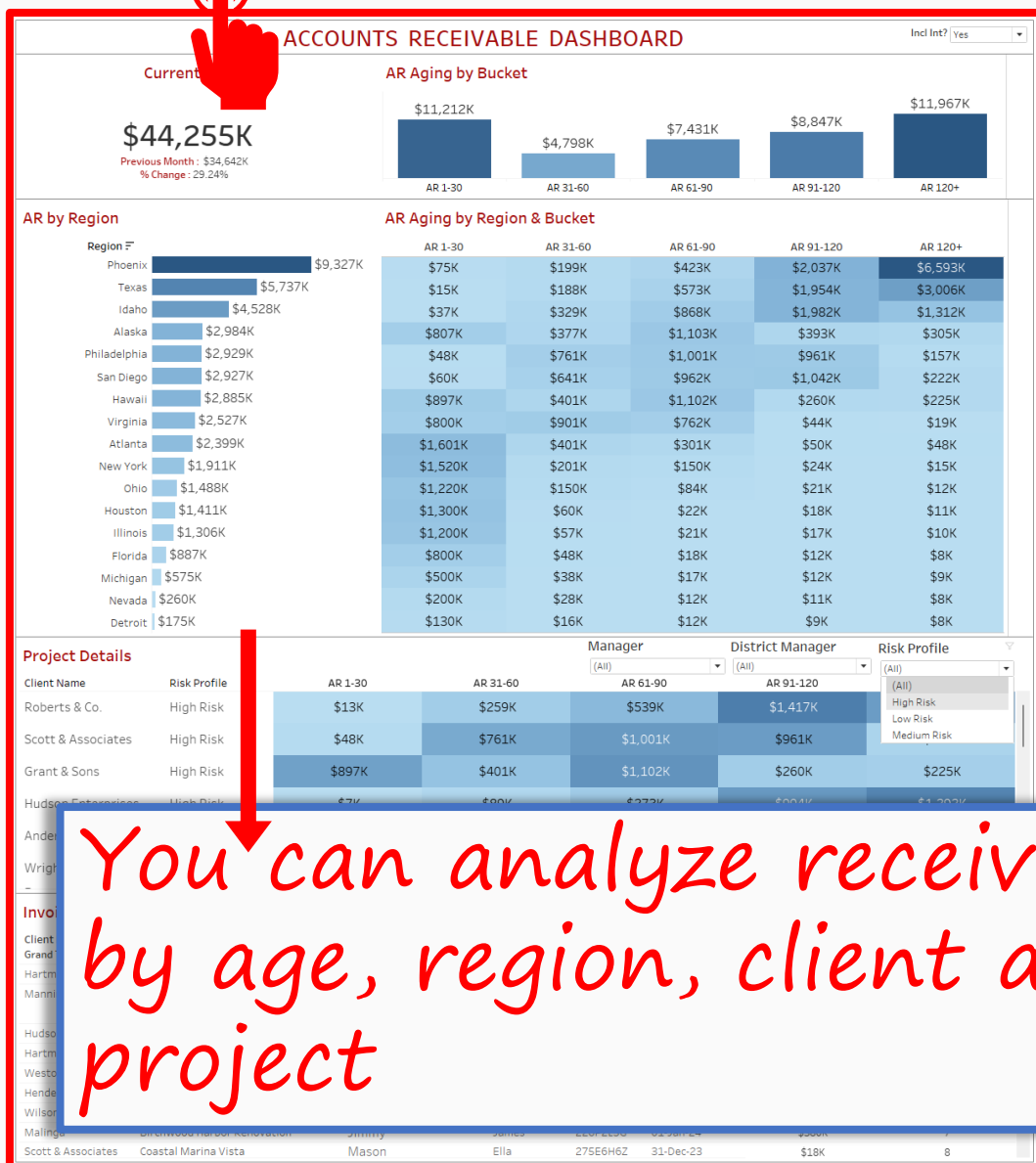
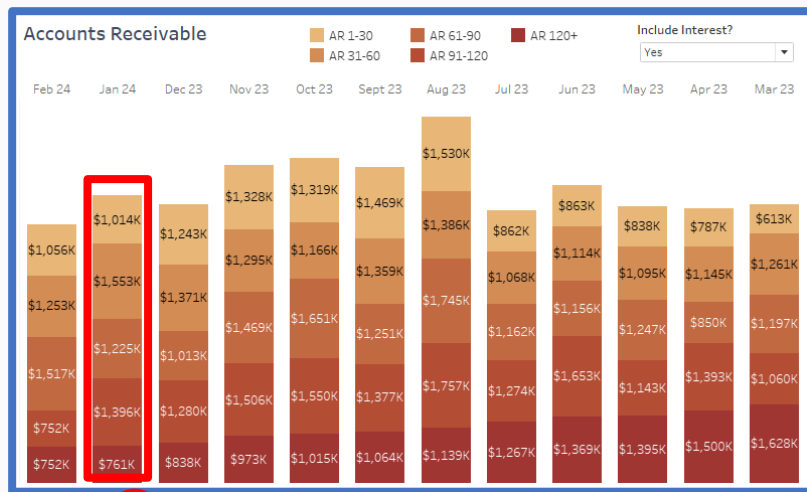
Let's look at the next KPI >>

Accounts Receivable (AR) has reduced in the last 6m



Let's look at AR in detail >>

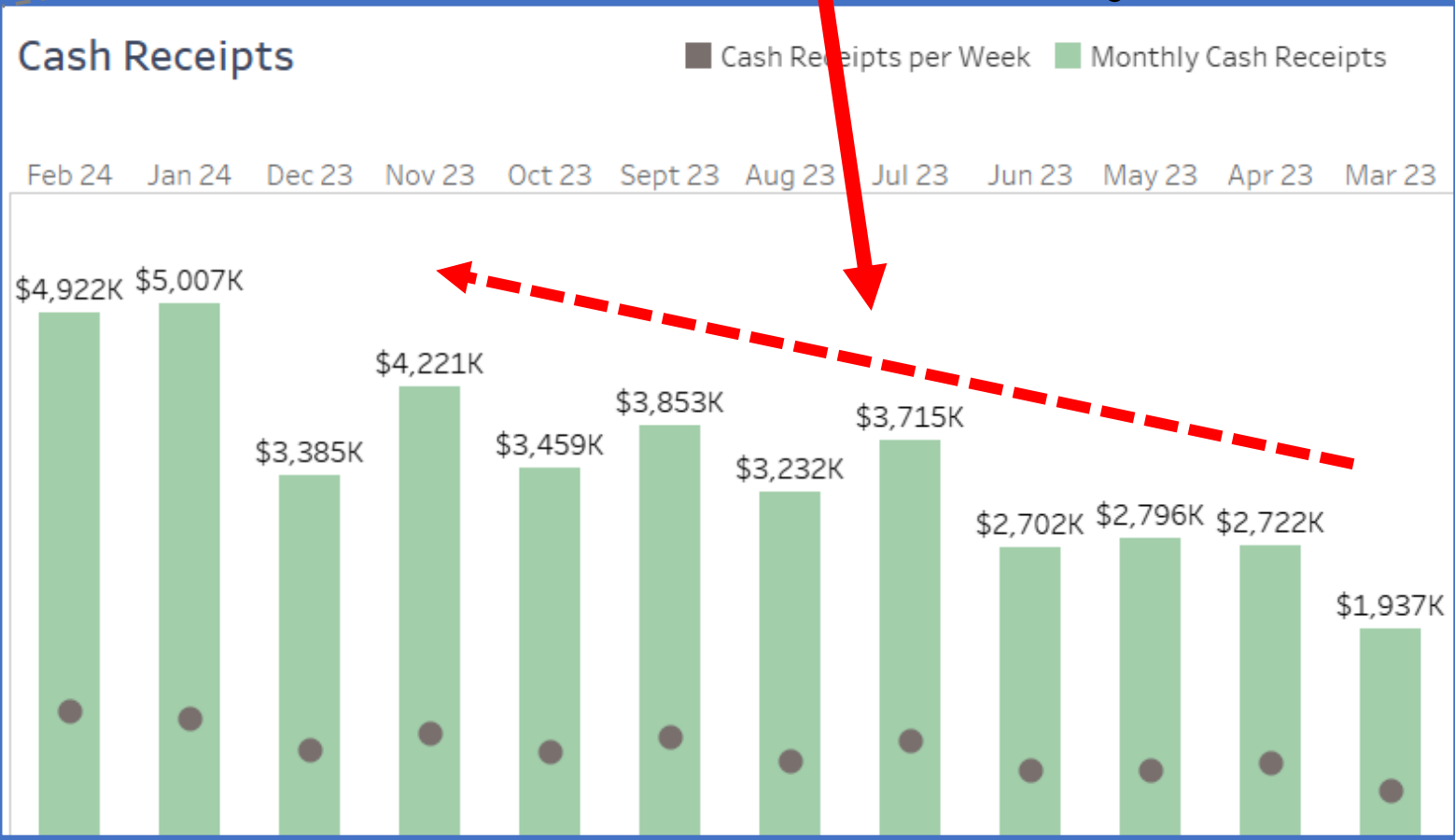
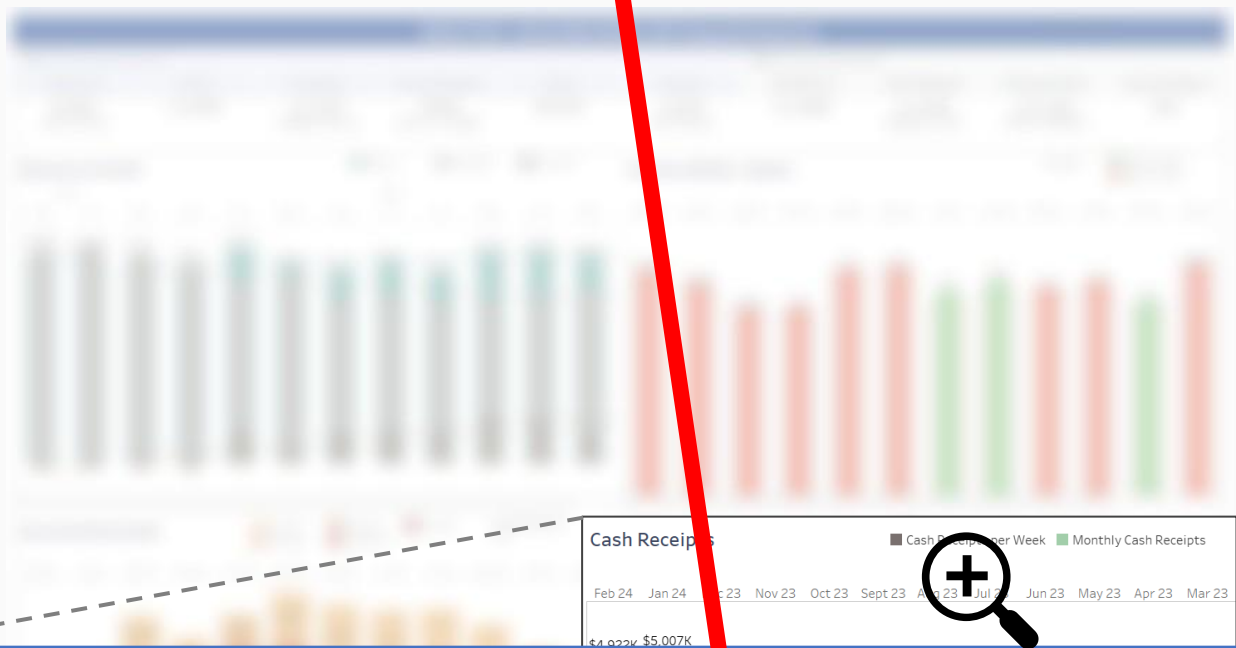
Click and jump to AR dashboard for further analysis



You can analyze receivables by age, region, client and project

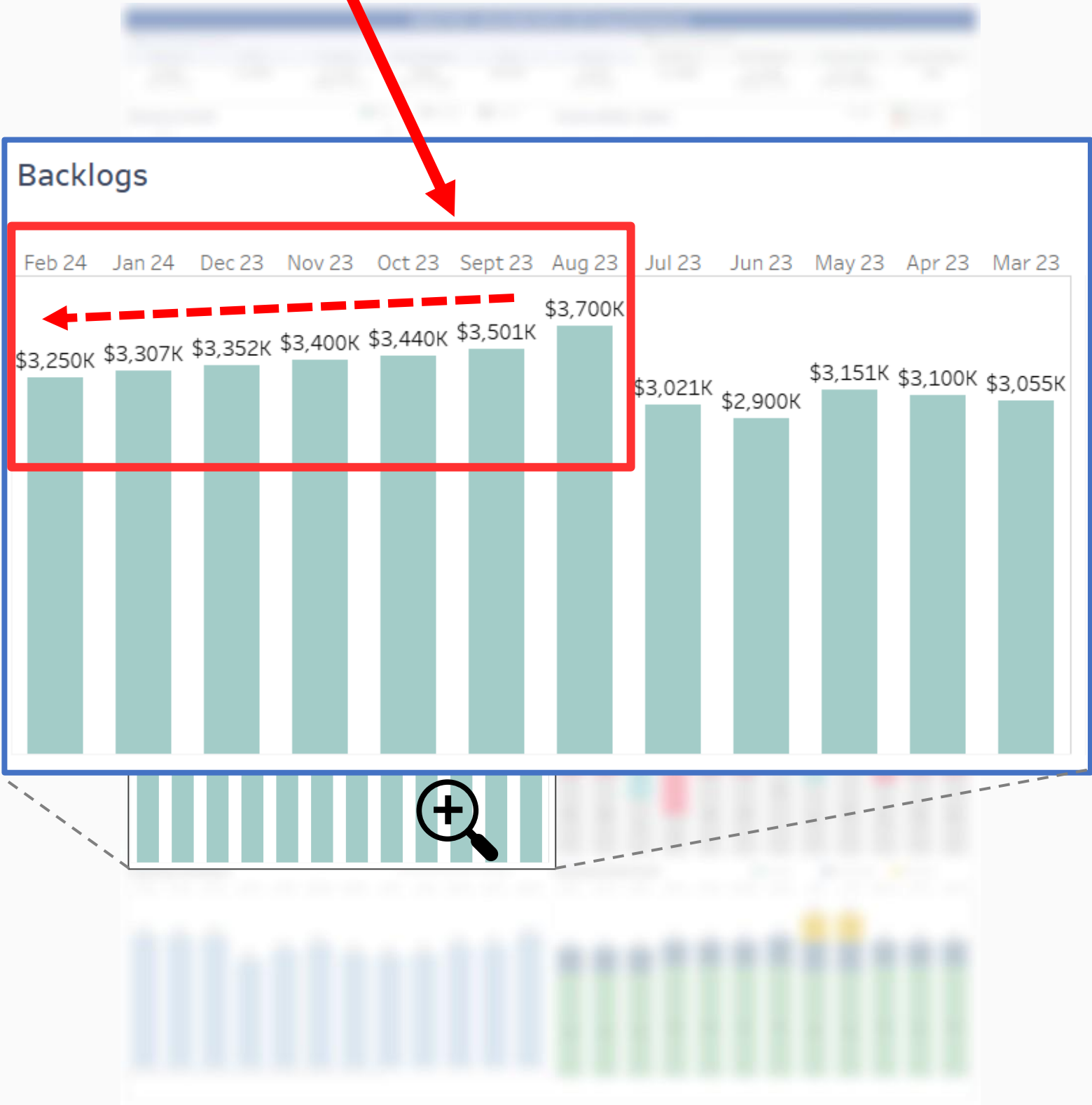
Let's look at the next KPI >>

Notice that the cash receipts have improved over time

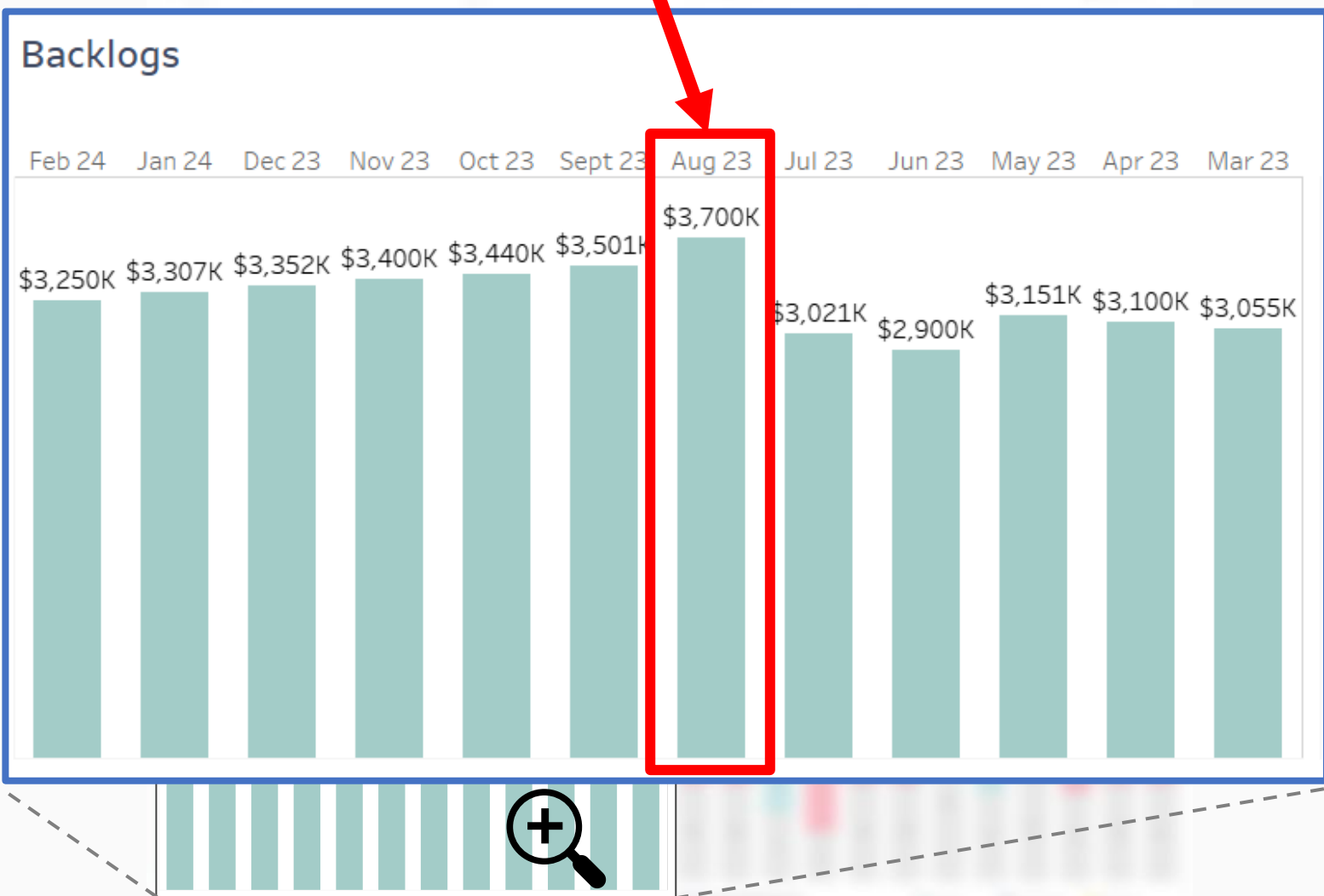


Let's look at the next KPI >>

Observe that the pending work in pipeline (Backlog) has reduced

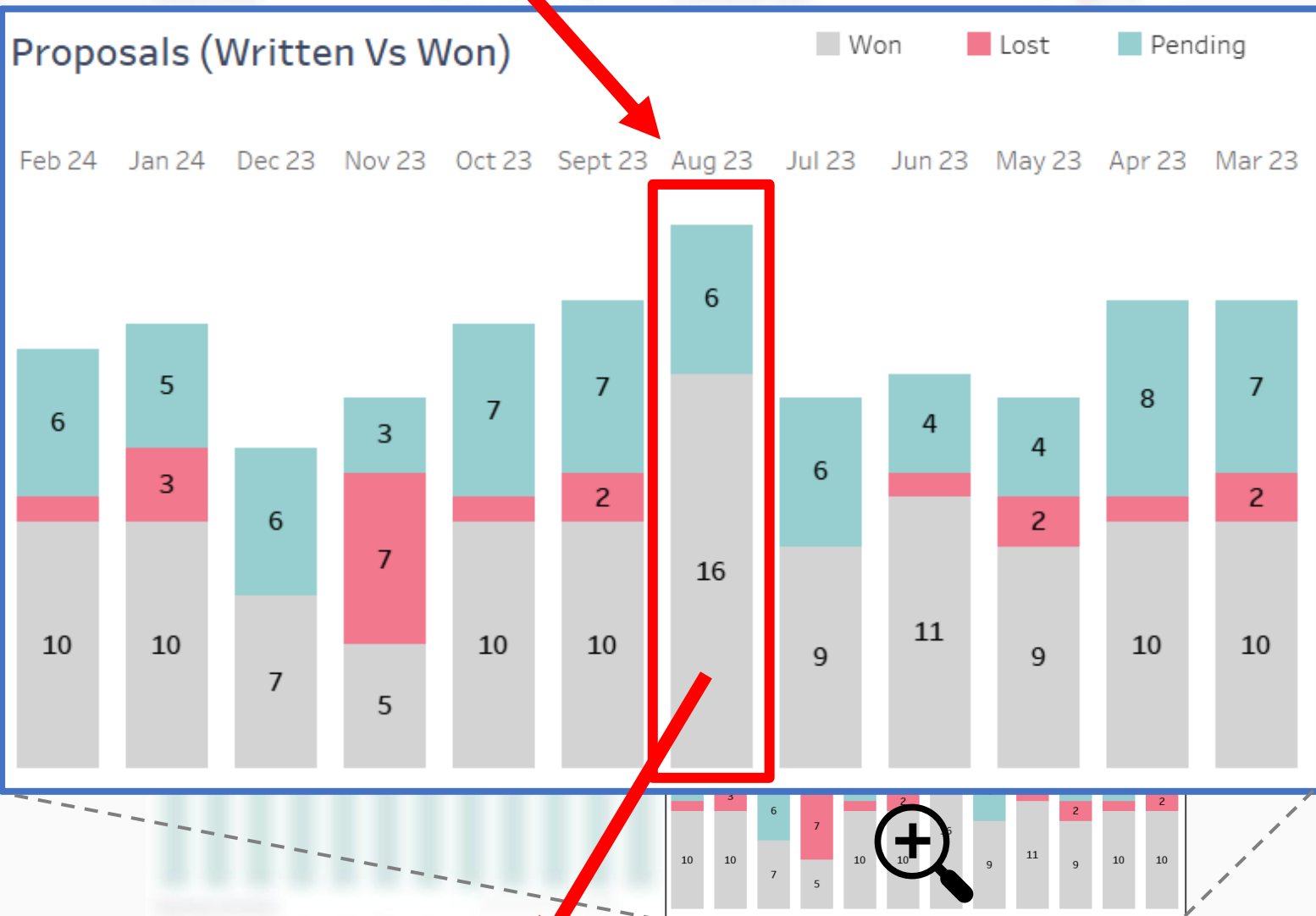


Also, notice the spike in backlog in August



Let's find out the reason behind it >>

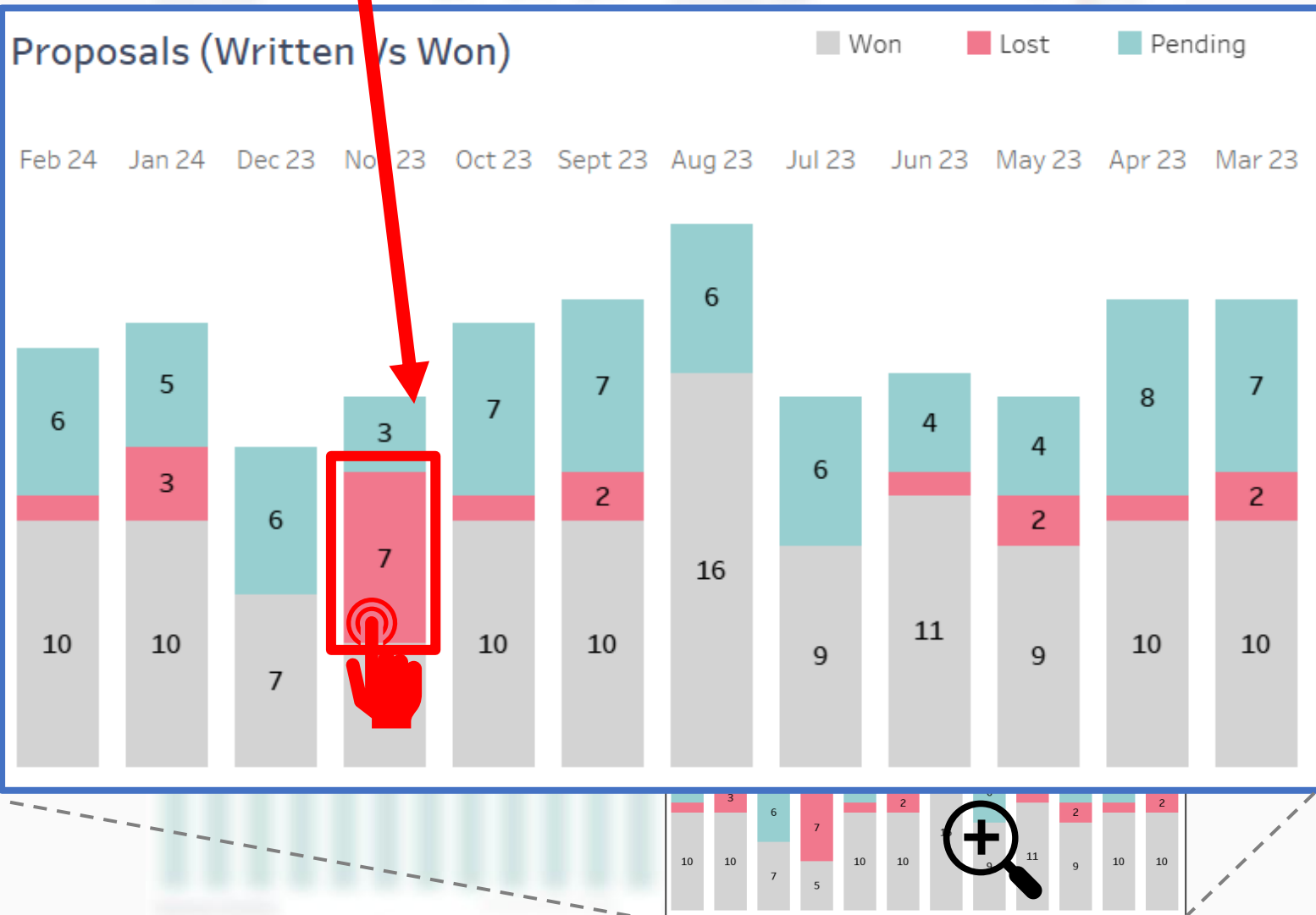
The increase in backlog was caused by higher proposal wins in August



Sixteen proposals were won and added to the pipeline

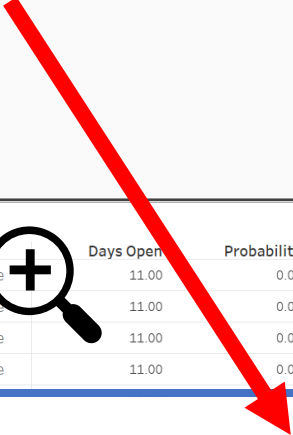
>>

Separately, 7 proposals were lost in November



Click to look at these lost proposals in detail >>

All proposals were submitted by Lanita Ishak



Project Details										
Org Name	Principal Name	WBS Number	Create Date	Stage Description	Proj Mgr Name	Name	Days Open	Probability	Weighted Revenue	
Baltimore	Lacovo Rudolf	37782-2591	08 Nov 2023	Lost	Lanita Ishak	Hard Tile & Stone	11.00	0.00	0.00	
		37782-2592	09 Nov 2023	Lost	Lanita Ishak	Hard Tile & Stone	11.00	0.00	0.00	
		37782-2593	10 Nov 2023	Lost	Lanita Ishak	Hard Tile & Stone	11.00	0.00	0.00	
		37782-2594	11 Nov 2023	Lost	Lanita Ishak	Hard Tile & Stone	11.00	0.00	0.00	

Project Details

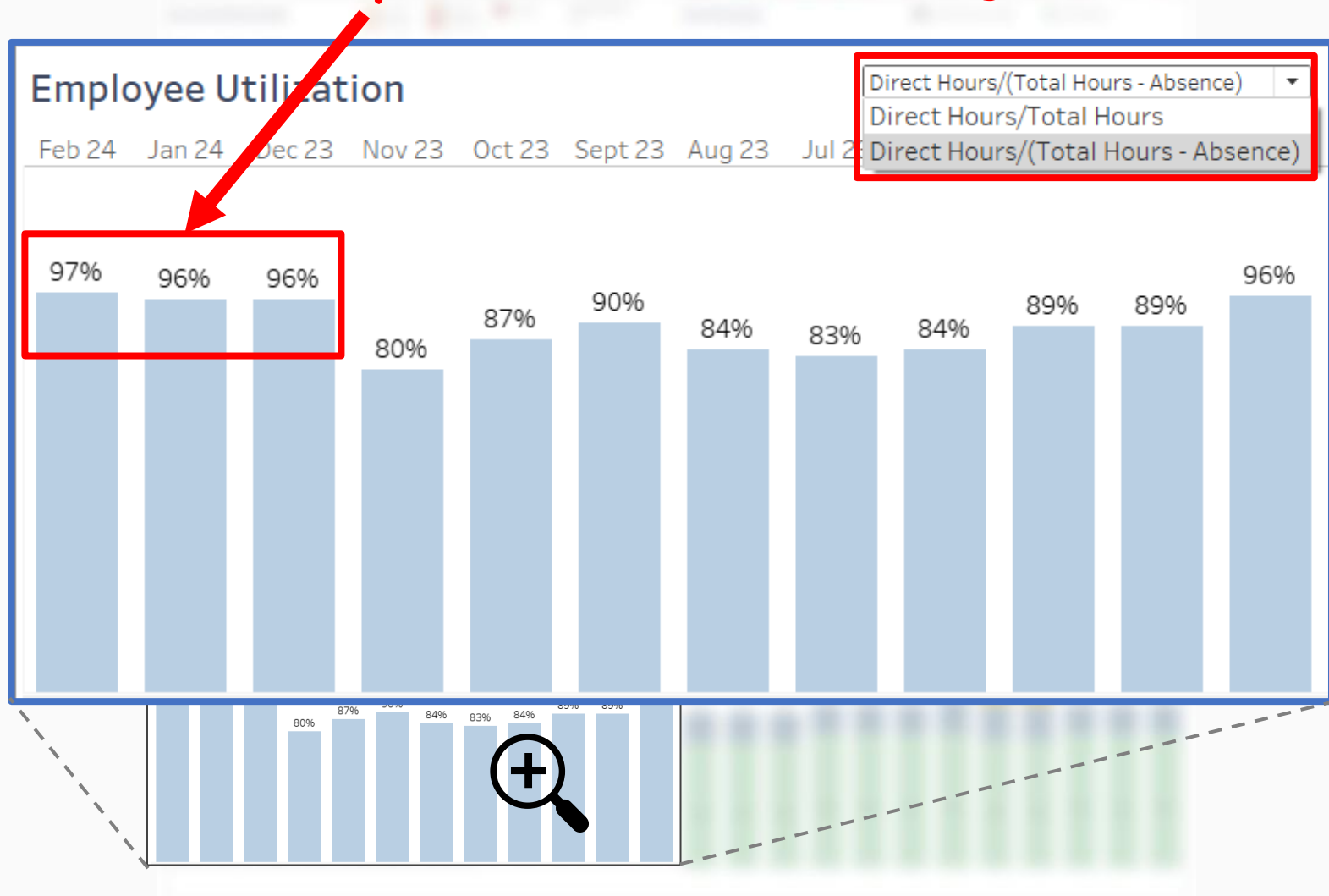
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Baltimore	Lacovo Rudolf	08 Nov 2023	Lost	Lanita Ishak
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		10 Nov 2023	Lost	Lanita Ishak
		11 Nov 2023	Lost	Lanita Ishak
		12 Nov 2023	Lost	Lanita Ishak
		13 Nov 2023	Lost	Lanita Ishak
		14 Nov 2023	Lost	Lanita Ishak

Action item: Diagnose the reasons behind the loss

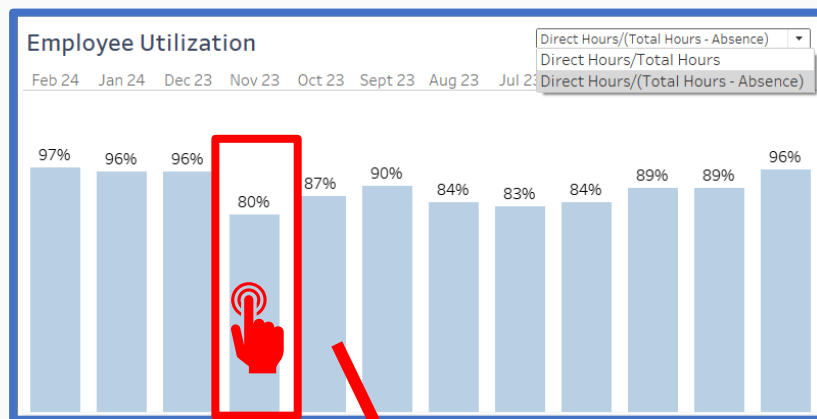
Let's look at the next KPI >>

Track the average employee utilization for each month

The employees' utilization has improved recently



Click and jump to utilization details at an employee level



Employee Utilization Details

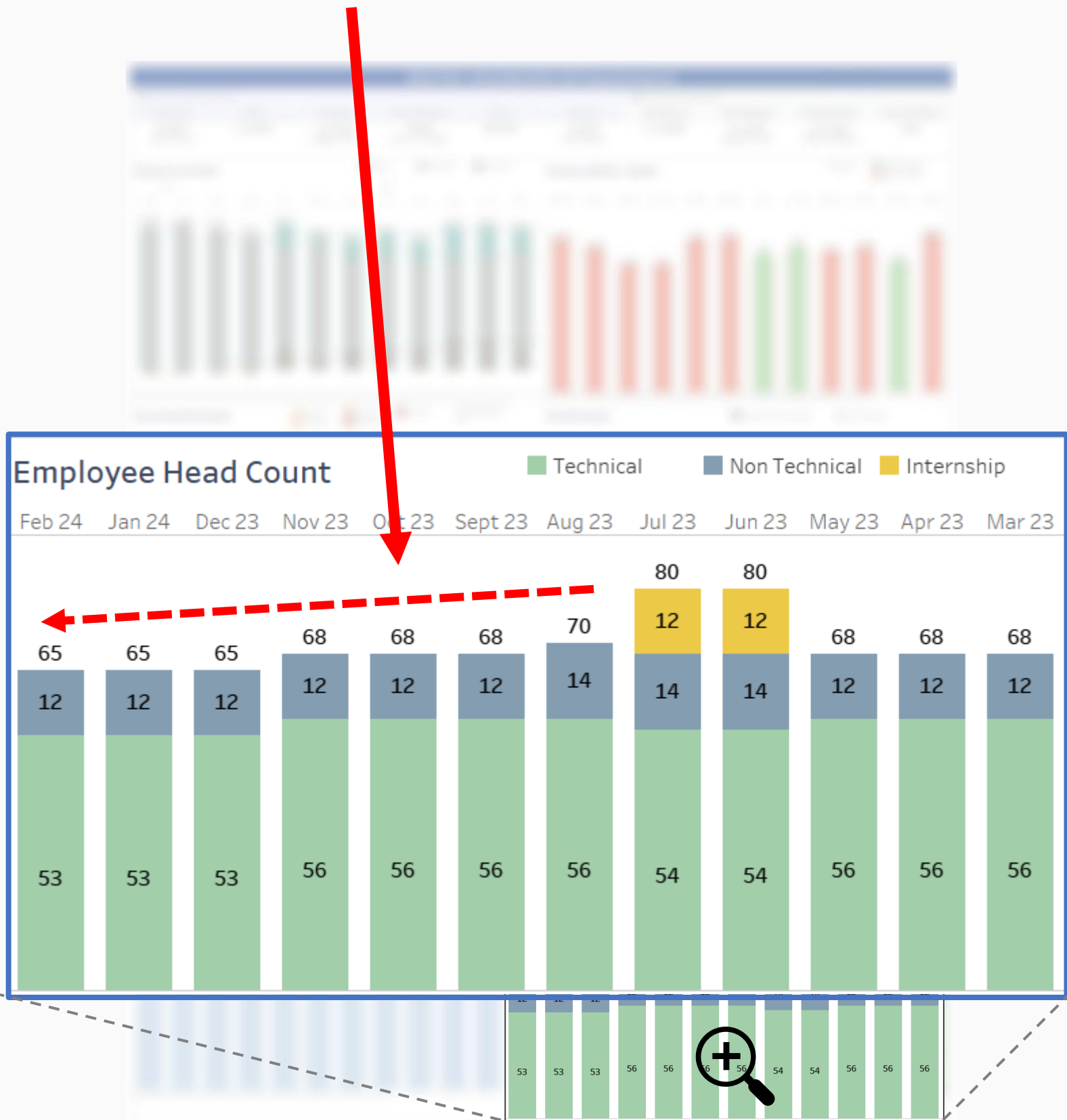
Ratio A: Direct/Total

Ratio B: Direct/(Total-Vacation-Holiday-Sick)

			Avg. Util. Ratio	Total hours	Dir
Grand Total			80%	1,701.0	1,315
Phoenix	Nov 2023	Ziva Sherman	74%	32.0	23
		Sania Mirza	76%	35.0	26
		Nancy Wheeler	76%	35.0	26
		Jermiah Sam	73%	31.0	22
		Luke Winter	70%	24.0	16
		Jessica Day	76%	30.0	22
		Jeny King	78%	33.0	25
		Derek Obrien	77%	31.0	23
		Ariel Winter	79%	34.0	26
		Yuan Jin	76%	26.0	19
		Winston Gail	81%	33.0	26
		Usain	81%	33.0	26

Let's look at the next KPI >>

Observe the change in workforce over the last 12m



Schedule a free consultation with us today!



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