

A Reseller's Guide to Selling DataSelf Analytics

DataSelf Analytics: Prospect Needs Self- Assessment

To help you determine what you need out of an Analytics solution, DataSelf has created the following questionnaire. This document will introduce you to the capabilities of analytics – the business pains it can address and the kinds of insight it can provide – thus giving your organization real-time awareness into what's happening in your business.

As an Analytics/BI solution, it's important to note that DataSelf's dashboards and reports reports offers 10 key capabilities missing from standard reports. With DataSelf Analytics, you can:

1. . . . know more (“drill-down”)
2. . . . see correlations (“slice-and-dice”)
3. . . . view data from different perspectives (e.g., sales by revenues, gross profit, COGS, etc.)
4. . . . represent your data visually
5. . . . say “what if . . . ” (“what if my sales increase by 15%?”)
6. . . . generate projections (“will I have enough stock 3 months down the road?”)
7. . . . use “plain English” to ask for the report you want
8. . . . create your own report (without asking for help by some data geek in IT)
9. . . . analyze conditions between multiple apps/sources
10. . . . get your report “now” (not hours later!)

Additionally, DataSelf incorporates a unique data optimization tool (ETL+) and data warehouse (SQL) that both simplifies and expedites the retrieval of critical data from your ERP & related systems.

The following questions are organized by ERP module (i.e., accounts payable, accounts receivable, inventory, etc.). Within each module, you are asked a series of questions regarding the “insight” that can be provided via DataSelf's reports and dashboards. For example:

Would you like instant visibility into receivables, such as who your highest-risk debt customers are?

If you feel that such insight would help you better manage your business – e.g., increase revenues, decrease costs/risks, or improve communications -- place a checkmark (v) next to that item.

(Note that these questions represent only a sampling of the kind of insight available from DataSelf's library of over 8,000 pre-configured reports & dashboards.)

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When finished with this questionnaire, a DataSelf consultant will contact you to schedule a product presentation – using examples of those analytical reports and dashboards that you have indicated are critical to the success of your organization.

Would you like instant visibility into your vendors & payables, such as:

- upcoming late fees?
- early pay discounts?
- vendor aging – debts over 'x' days old
- overdue (& coming due) invoices?
- open balances by due date?
- coming due, overdue, or damaged deliveries?

Would you like instant visibility into your overall sales figures, such as:

- your total sales this period versus last (with dollar & percentage variances)?
- your geographic sales distribution, highlighting top growth & decline regions?
- salesrep performance – who's met their numbers, who hasn't, & who's close
- your daily stats, including sales, gross profit, qty sold, & top clients, salesreps & items?
- multi-year customer sales rankings (who's going up; who's going down)?
- forecast sales over the next 'x' weeks/months/years for specific items, salesreps, or clients?
- major variances in sales trends by month & year, including total sales & gross profit?

Would you like instant visibility into receivables, such as:

- who's over 30, 60, 90, or 120+ days old?
- which clients & salesreps are most challenged with collections?
- what regions have the highest outstanding debts?
- what your DSO (days sales outstanding) is?
- who your highest-risk debt customers are?
- what your potential bad debt exposure is?

Would you like instant visibility into client sales figures, such as:

- how sales compare this period vs prior?
- who's met or exceeded last year's sales?
- who your top performers are?
- who's top in sales growth or decline?
- which top clients have no current sales?
- whose business have you kept (and whose have you lost)?
- where clients rank in net & gross profitability?

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Would you like instant visibility into your product sales, such as:

- which products are selling better or worse than last year (and by how much)?
- which products are your top-sellers to your top clients?
- which top-selling products are not being purchased by your top clients?
- your best (& worst) sellers, along with transactional-level detail?

Would you like instant visibility into your pending sales, such as:

- which clients have pending or overdue sales (and how much they're worth)?
- your sales 'velocity' (total opps, close rate, avg sale, avg days to close)?
- the number and type of activities scheduled per client & by salesrep?
- your sales funnel (opps & dollars in various stages of the funnel)?
- which products have pending or overdue sales (and how much they're worth)?
- scheduled shipments that have been missed

Would you like instant visibility into your inventory status, such as:

- current & future stock shortages or outages?
- overstock or slow-moving items?
- items that have not been sold in 'x' days?
- quantity on-hand & days of stock remaining?
- quantity sold per item over timeframe 'x'?
- excessive price increases?

Would you like instant visibility into your purchase orders, such as:

- POs that are overdue (& by how many days)
- POs that are coming due (within the next 'x' days)
- vendors who miss their delivery deadlines?
- excessive price increases?

Would you like instant visibility into your financials, such as:

- cashflow projections for time range 'x' – combining AP, AR, Cash, & Payroll?
- overall financials dashboard – with revenues, gross profit, operating expenses, & net income?
- profit & loss tracking – for time range 'x'?
- budget versus actual comparisons?
- balance sheet & trial balance – with period-to-period comparisons