
ERP TECH

SUMMIT 2024

KPIs and Dashboards

Power BI and Fabric

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Innovative Consulting Group

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Agenda



Introduction



ICG's Approach & Value We Deliver



Review Of Services & Solution



Solution Demo

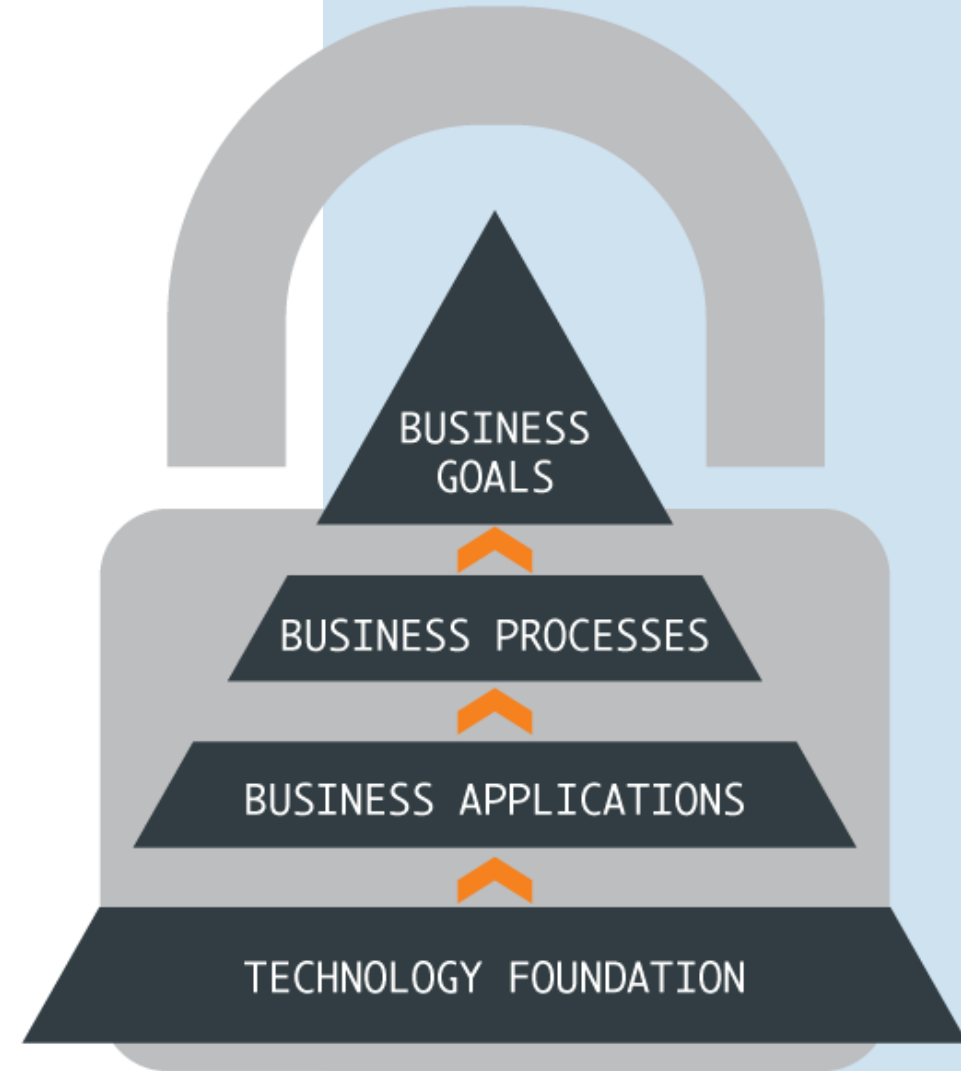


Discussion & Next Steps

The ICG Approach

A solid **technology foundation** delivers your **business applications** when and where you need them. These two combined implement your unique **business processes**, allowing you to reach your **goals**.

ICG is a process-driven business technology company that ensures your IT platform securely delivers your applications and processes whenever and wherever you need them.





Microsoft's Power BI – The Clear Choice



Microsoft Owns the Stack

- OS
- SQL Server
- SSRS
- PowerBI
- AI & Fabric



Huge Lead Over the Rest

- According to [data from Gartner](#), Power BI (Microsoft) is the most popular business intelligence tools on the market
- As Power BI was developed by Microsoft, it will be easier to integrate into your workspace if you use Office software. Likewise,



Microsoft AI Fabric Woven in at all Levels

Microsoft Fabric is an end-to-end analytics solution with full-service capabilities including data movement, data lakes, data engineering, data integration, data science, real-time analytics, and business intelligence—all backed by a shared platform providing robust data security, governance, and compliance.

Figure 1: Magic Quadrant for Analytics and Business Intelligence Platforms



Gartner (June 2024)

Gartner



Modernize Your ERP with BI - Dashboards

✓ Business Intelligence – Informed Decisions

Dashboards empower key stakeholders through the visualization of critical performance, financial, and production metrics across their business.

✓ Easy to Use Toolset

The goal is to provide an easily customized reporting format that can be quickly generated by anyone with little or no technical expertise.

✓ Deliver From Anywhere

Securely deliver information in “real time” and on-demand from any device, either locally or in the cloud.





Modernize Your ERP with BI - Dashboards

✓ Trends and more Trends

Link similar data to gain key insights in seconds. Ordinarily, this would take hours or days with more programming-intensive methods. No "Excel Hell".

✓ Different Data Sources – No Problem!

From human resources, raw materials, capital investments, production equipment, logistics, to customer service and support, BI prevents data from staying siloed.

✓ Measure and Take Action

Improve process efficiency, centralize production monitoring, and better serve customers. Business analytics drive actionable changes in workflow.





Where Can I Use Dashboards?

- ✓ Department or Functional Areas
- ✓ Digital Signage
- ✓ Combining Disparate and Related Data
Wherever you Need it





ICG's Dashboard Development Process

✓ Installation and Configuration

Install and Configure the SQL and Dashboard toolsets. Confirm Operation.

✓ Education - Training

Perform basic Dashboard / Reporting Education. Informed staff helps determine where Reports vs Dashboards are needed and train the champion of reporting for the organization.



✓ Discovery

Perform Detailed Discovery focusing on areas that benefit the most from Dashboard/Reporting Improvement.

✓ Develop Dashboard & Validate

Collaboratively develop dashboards. Validate data sets and dashboard results.



KPIs - Dashboard - Customer 360



Salesperson Dashboard

Hover over data to view tooltips, click data to filter. As of 10/21/2020 8:05:00 PM.

Cust ID Name Prod ID Desc Salesperson
 (All)

Sales

Almost
35,010K

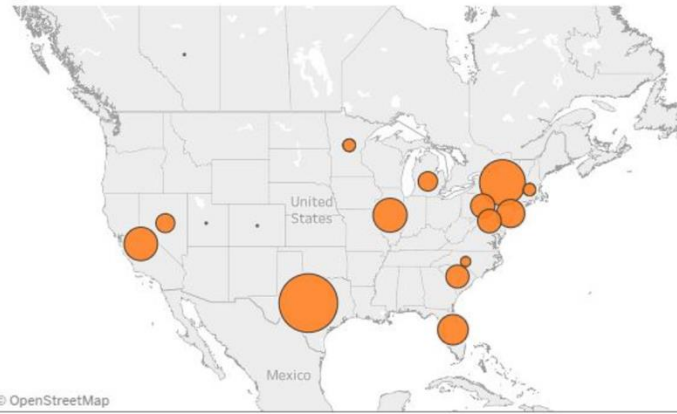
Goal 36.0M

Doc Date Goal Measure
 Previous ye... 36.0M Sales

Customer	Value
FDIAGRI - Agrilink Food	3,180K
MICROCHIP - Microchip Restaurant	3,145K
ELEVATION - Elevation Computers	2,657K
TOYSTAR - Star America Toys	2,135K
WIDGETCC - Widget Credit Card	1,891K
TOYONEILL - O'Neill's Trading	1,583K
ABCVENTURE - ABC Capital Ventur..	1,573K
MARINAGOLF - Marina Golf Club	1,439K
WIDGETBUY - Widget Connection	1,270K
APOSTELSCH - Church of The Apost..	1,221K
WESTWOOD - Westwood Manor	1,132K
ABARTENDE - USA Bartending Sch..	1,097K
INDSACRAME - Sacramento Indust..	1,028K
BRASSKEY - Brass Key Bar	988K

Product	Value
CONBABY2 - Little Tikes Bold n Bri..	4,100K
AACOMPUTO1 - Acer Laptop Compu..	2,784K
FOODSUGAR - Sweet N Low Sugar ..	2,500K
CONTRAMPL - Skywalker trampolin..	2,151K
INDOVEN1 - Industrial Conveyor O..	1,898K
CONWEIGHT1 - Bowflex Adjustable..	1,620K
AALEGOS00 - Lego 500 piece set	1,585K
CONHEARTM1 - Polar Heart Rate M..	1,440K
FOODHOTDOG - Ball Park Beef Fran..	1,180K
CONBABY3 - Grac Pack N Play with ..	1,157K
FOODBREAD - Hot Dog Buns 8 PK (.	1,118K
FOODTEA06 - Liptons Cold Brew Te..	1,018K
SPECIALORD - Special or custom or..	975K

Sales by Region



CRM Pipeline Amt by Account (opp stage color coded)

Westland Helicopters	890K
Maverick Papers	300K
Eurolandia	58K
Gatecom Inc.	32K
Wiseman Cable Systems	67K
Harlob Controls Limited	50K
Veritas Sales Manageme..	100K
Sutton Water	100K
DCS Personnel	96K
Logistix Ltd	95K
TA Machinery	94K
Refining Interone	93K
Vita Store	91K
Alba International	91K
Weeks Mayall Ltd	90K
Union Computer	90K
Cap Warehouse	00K

AR Aging On Time 7,222K 8,701K

Customer	Value
WIDGETCC - Widget Credit Card	1,528K
TOYSTAR - Star America Toys	966K
FDIAGRI - Agrilink Food	835K
MARINAGOLF - Marina Golf Club	606K
SNOSHORT - Shortstop Sports	554K
MICROCHIP - Microchip Restaurant	481K
TOYONEILL - O'Neill's Trading	405K
ELEVATION - Elevation Computers	389K
ELITEANSW - Elite Answering	358K
WIDGETBUY - Widget Connection	339K
WESTWOOD - Westwood Manor	321K
INDSACRAME - Sacramento Industial ..	280K
ABCVENTURE - ABC Capital Ventures	222K

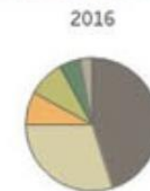
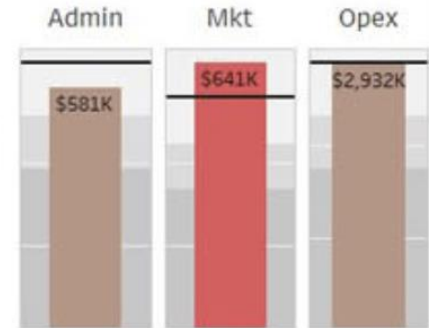
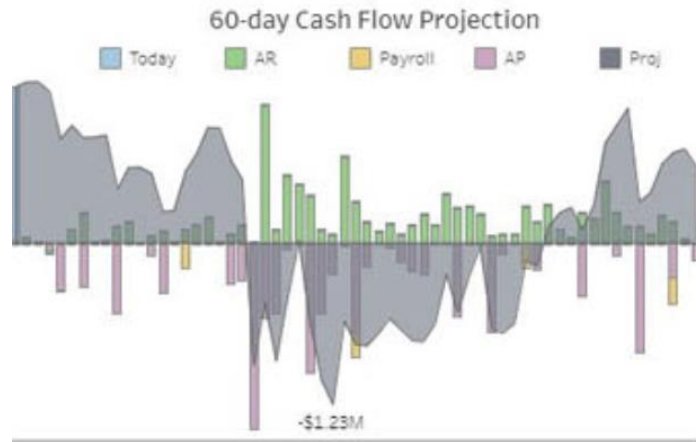
Marketing Emails (Bar labels = Opens, Left # = Clicks)

LETLETAD ORP.	1,624	6,786
CUTCUNNOM OBLE	87	4,251
RETRRETELL LLP	2,574	
CUTCUM TOM GRAM	406	2,262
RETREK ELL INC.	145	1,976
RETREA ELL IONS	29	1,729
RETREE ELL PANY	29	1,690
RETREROELL ORP.	116	1,664
RETRET@ELL INC.	1,586	
ISTISYA PAYA	1,365	
CUTCUDATOM LLC	1,235	
RETREYTELL LLC	1,222	
RETRES ELL INC.	232	1,196
RETRE3 ELL LOGY	261	1,183
RETREUMELL TICA	116	1,131
RETREUAEELL GIES	1,079	
RFTDFTTELL INC.	00	000



KPIs - Dashboard – Business 360

360-degree View of the Business

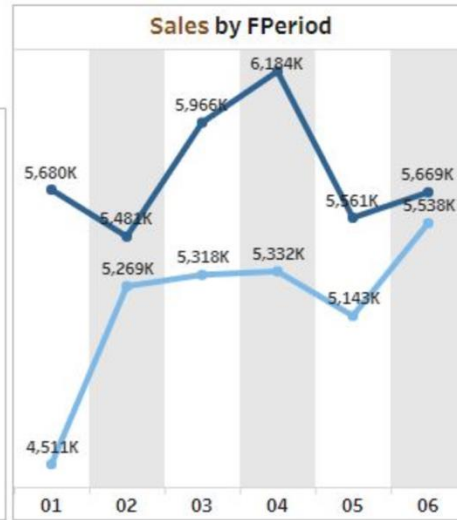
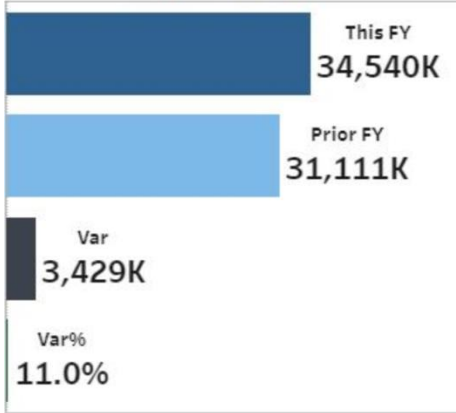




KPIs - Dashboard - Customer 360

Year-over-Year Sales

Hover over data to view tooltips, click data to filter.
As of 07/03/2020 11:01pm.



Customer	Prior FY	This FY	Var
FDIAGRI - Agrilink Food	3.1M	3.2M	123K
MICROCHIP - Microchip Rest..	2.8M	3.1M	310K
ELEVATION - Elevation Comp..	3.0M	2.6M	-376K
TOYSTAR - Star America Toys	1.7M	2.1M	404K
WIDGETCC - Widget Credit Ca..	1.3M	1.9M	514K
TOYONEILL - O'Neill's Trading	1.3M	1.6M	331K
ABCVENTURE - ABC Capital V..	0.9M	1.6M	641K
MARINAGOLF - Marina Golf C..	1.3M	1.4M	135K
WIDGETBUY - Widget Connec..	0.4M	1.3M	840K
APOSTELSCH - Church of The ..	0.3M	1.2M	867K
WESTWOOD - Westwood Ma..	0.4M	1.1M	721K
ABARTENDE - USA Bartendin..	1.7M	1.1M	-621K
INDSACRAME - Sacramento I..	1.0M	1.0M	0K
BRASSKEY - Brass Key Bar	0.3M	1.0M	668K
JEVTCOMPUT - Jevy Compute..	0.1M	0.9M	785K
ELITEANSW - Elite Answering	0.8M	0.8M	43K

Home icon

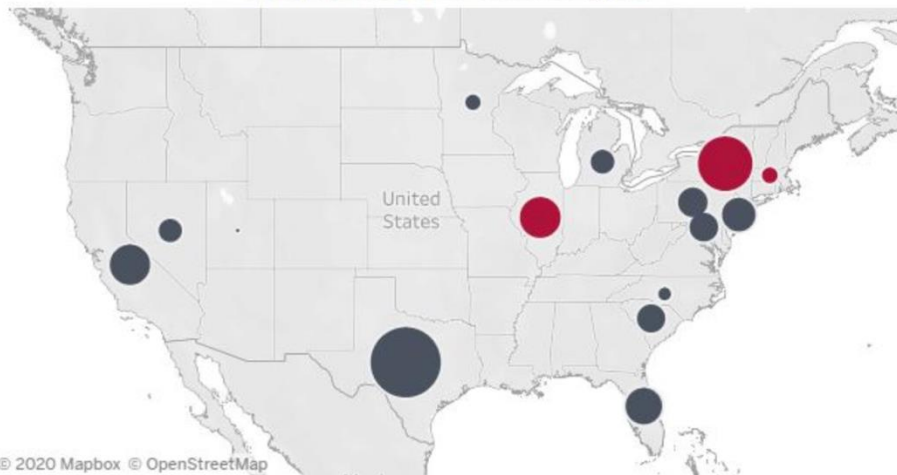
This FY Year

FY 2020

- (All)
- 01
- 02
- 03
- 04
- 05
- 06
- 07
- 08
- 09
- 10
- 11
- 12

Cancel Apply

Bubble Size: Sales This FY, Color: Up Down



Product	Prior FY	This FY	Var
CONBABY2 - Little Tikes Bold ..	3.0M	4.1M	1,140K
AACOMPUT01 - Acer Laptop ..	2.6M	2.8M	214K
FOODSUGAR - Sweet N Low S..	2.2M	2.5M	348K
CONTRAMPL - Skywalker tra..	1.8M	2.2M	326K
INDOVEN1 - Industrial Conve..	3.0M	1.9M	-1,100K
CONWEIGHT1 - Bowflex Adju..	1.3M	1.6M	278K
AALEGO500 - Lego 500 piece ..	1.3M	1.6M	298K
CONHEARTM1 - Polar Heart ..	1.2M	1.4M	241K
FOODHOTDOG - Ball Park Bee..	1.1M	1.2M	39K
CONBABY3 - Grac Pack N Pla..	0.9M	1.2M	259K
FOODBREAD - Hot Dog Buns ..	1.1M	1.1M	-19K
FOODTEA06 - Liptons Cold Br..	0.9M	1.0M	113K
SPECIALORD - Special or cust..	1.0M	1.0M	-1K
CONBABY1 - South Shore Sav..	0.9M	1.0M	92K
CONSULTING - Project Consul..	0.5M	0.8M	306K
FOODCOLA12 - Coca-Cola Can	0.8M	0.8M	43K

SA Measure

Sales

Cust ID Name

Doc Type

(All)

Prod ID Desc

Prod Type

(Multiple valu...)

Salesperson

(All)



KPIs - Dashboard – Top Customers



Hot Customers by Sales P1 = 10/01/19 to 12/31/19 P2 = 01/01/20 to 06/30/20

Select data points to filter and drill down to 2nd dimension. Use boxes on the right to customize. As of 10/21/2020 8:05:00 PM

P1 = to 
 P2 = to

On Fire

Top 30 Customers by Sales in P2

FDIAGRI - Agrilink Food	3,180,150
MICROCHIP - Microchip Restaurant	3,145,225
ELEVATION - Elevation Computers	2,605,546
TOYSTAR - Star America Toys	2,135,280
WIDGETCC - Widget Credit Card	1,861,958
TOYONEILL - O'Neill's Trading	1,582,752
ABCVENTURE - ABC Capital Ventures	1,573,053
MARINAGOLF - Marina Golf Club	1,439,281
WIDGETBUY - Widget Connection	1,270,225
APOSTELSCH - Church of The Apostles	1,206,927
WESTWOOD - Westwood Manor	1,131,963
ABARTENDE - USA Bartending School	1,096,547
INDSACRAME - Sacramento Industrial Supply	1,027,832
BRASSKEY - Brass Key Bar	987,735
JEVTCOMPUT - Jevy Computers	923,373
ELITEANSW - Elite Answering	816,904
SNOSHORT - Shortstop Sports	808,086
FDIQVIK - Qvik Process GmbH	807,903
ABCSTUDIOS - ABC Studios Inc	795,480
PRECISION - Precision Photos	789,892
CARIBBEAN - Caribbean Secretary Online	683,398
STREAMRAY - Streamray Inc	433,279
ARTCAGES - Artcages	415,091
WRIGHTCORN - Wright Corner	410,855
NAAAPASSOC - Naaap Associates	404,034
BIBIMBAB - Bibimbab Korean Restaurant	373,966
BEAUTYSCH - New York International Beau..	348,855
FDIMINN - Minneapolis Food Distribution	302,382
INDSUPPLY - Industrial Supply Inc	283,182

Heating Up

Top 30 Customers by Sales Growth: P2 - P1

MICROCHIP - Microchip Restaurant	1,713,680
ELEVATION - Elevation Computers	1,704,724
FDIAGRI - Agrilink Food	1,694,335
TOYSTAR - Star America Toys	1,461,768
WIDGETCC - Widget Credit Card	1,368,222
WESTWOOD - Westwood Manor	1,131,963
APOSTELSCH - Church of The Apostles	1,075,494
WIDGETBUY - Widget Connection	1,019,338
TOYONEILL - O'Neill's Trading	851,978
ELITEANSW - Elite Answering	786,904
ABCVENTURE - ABC Capital Ventures	560,502
FDIQVIK - Qvik Process GmbH	528,859
ABARTENDE - USA Bartending School	523,663
INDSACRAME - Sacramento Industrial Supp..	513,916
ABCSTUDIOS - ABC Studios Inc	467,990
SNOSHORT - Shortstop Sports	434,178
BRASSKEY - Brass Key Bar	413,979
CARIBBEAN - Caribbean Secretary Online	404,828
ARTCAGES - Artcages	354,541
WRIGHTCORN - Wright Corner	318,074
JEVTCOMPUT - Jevy Computers	288,204
PRECISION - Precision Photos	287,781
STREAMRAY - Streamray Inc	242,307
BEAUTYSCH - New York International Beau..	235,215
NAAAPASSOC - Naaap Associates	216,507
BIBIMBAB - Bibimbab Korean Restaurant	213,381
CJOEQUIP - Jersey Central Office Equip	161,680
WIDPARENT - Widget Consolidated Holdings	156,360
INDSUPPLY - Industrial Supply Inc	141,591

Top N

Measure
Sales

Dimension
Customer

2nd Dimension
Product

Cust ID Name

Doc Type
(All)

Prod ID Desc

Prod Type
(Multiple val...)

Salesperson
(All)



ICG Dashboard Development KPI Package



MSSQL Views Tailored for your Business

Sales Data

- Customers
- Customer Orders/History
- Shipments

Manufacturing/Supply Chain Data

- Manufacturing Orders
- Inventory & Inventory History
- Mfg. Orders, History, Receipts
- Mfg. Labor
- Mfg. Material Issue
- Supply Demand Data

Purchasing

- Vendors
- Purchase Order s/History/receipts
- Vendor Ontime/Late

Finance

- AR/Invoices / history
- Accounts Payable
- Aging AR/AP
- Cash On Hand



Dashboard Development

- ✓ Educate Staff on what is possible with dashboards
- ✓ Determine reporting vs dashboard needs for the organization
- ✓ Design Report/Dashboard requirements
- ✓ Develop Dashboard
- ✓ Work with customer's staff training on dashboard development
- ✓ Test and Validate Dashboard
- ✓ Move to production



Demo





Power BI Dashboard Solution Pricing



Description	Price	Qty	Ext. Price
Power BI SQL Data Views and Templates One Time Fee - Software Installation, ERP SQL Views Creation, Basic Training	\$ 6,995.00	1	\$ 6,995.00
ICG Power BI Template and View Maintenance (2 yr. commit) ICG delivers new Views and BI Template Updates Quarterly	\$ 1,748.75	1	\$ 1,748.75
Power BI Data and Design Services Implementation, Dashboard and Data Design, Advanced Training	\$ 250.00	40	\$ 10,000.00
Subtotal Year One			\$ 18,743.75



Discussion and Questions

