Customer Analysis



Companies are continuing to adopt a more customer-centric approach to doing business, realising that in this competitive marketplace, a satisfied customer is an extremely valuable asset. To ensure that the most profitable customers remain satisfied and that sales and marketing efforts are aimed at retaining the right customers and attracting the right prospects, we need to know our customers more intimately. And that starts with having a single, integrated view of customer activity from which revenue-building and customer management decisions can be made.

The CRM Analysis (CRM-A) module of Stratum addresses these challenges by helping companies identify their most valuable customers, group these customers based on purchasing behaviour and other attributes and then target them with promotions and sales efforts that are designed to increase customer loyalty and boost sales revenue. Stratum CRM-A completes the cycle by measuring customer satisfaction and the resulting buying behaviour. Customer Value Assessment

Customer Segmentation

Customer Management



Customer Value Assessment

By understanding the relative value of each customer, you can then begin to focus sales and marketing efforts on the most profitable ones and those with the most profit potential. Stratum CRM-A allows you to examine customer and channel value from multiple perspectives, such as lifetime sales, gross margin contribution and by factors that affect profitability -discounts, freight and handling and average selling price.

- Determine lifetime sales by customer and customer type to identify your most loyal customers and largest market opportunities.
- Identify and rank customers who are considered "high value" based on discount level and gross margin and uncover areas where discounting is cutting into profits.
- Evaluate how sales revenues and gross profits are trending by customer and channel to anticipate future sales and profits and focus retention efforts on customers whose purchases have decreased.
- Measure the impact of average selling price and cost of goods sold on gross profits to determine if prices or costs are eating away your profitability.
- Isolate the effect of freight and handling costs on customer profitability and discover low profit customers that may require more cost effective shipping methods.
- Assess year to date sales revenue performance relative to budgets, forecasts and last year's performance, to determine variance to plan.

FUNCTIONS	KEY ELEMENTS (ANALYZED or PLANNED)	MEASURES / REPORTS (INCLUDED)	BENEFITS
Customer Scorecarding	Channel	Lifetime Revenue Contribution	Improved customer
	Discounting	Discount Impact	management
	Profitability	Net Profitability	Better understanding o bottom-line contributio
	Lifetime Value	Performance by Month	by customer
	Loyalty (receny of last purchase)	Channel Profitability	Increased customer revenue & profitability
		Trending	
		RFM Ranking	

	9922	60	CO 1 to 27 of 27	00 1 to 5 of 5		
II – View Name ↓ → View Filt	e: <i>Discount TY vs LY</i> er >>					
T Customer	SoldTo Short Description	Change in Discount Percent	% Change in Discount Amount	% Change in Avg Sell Price	% Change in Sales at Invoice Price	% Change in
<u>150140</u>	Midwest Providers	1.4%	174.9%	1.2%	11.1%	
150150	Harrington's Eastern	.2%	21.3%	.5%	10.1%	
150240	Olivieri Distributors	4%	-1.0%	.7%	15.4%	
150250	Prestwick Brothers	.5%	50.4%	.5%	18.2%	
150300	Auburn Providers	.4%	27.6%	.3%	6.8%	
150310	Maple Tree Foods	-2.2%	-57.2%	2%	-14.7%	
150370	Southwest Foods	.6%	50.9%	.3%	10.1%	
150130	Sumpter Dist'n Western	4%	-3.1%	1.8%	12.2%	
150230	Penn Brands	-11.7%	-84.1%	-1.2%	8.4%	
150290	Montelissi Distribution	-14.5%	-85.4%	.6%	22.6%	
					0.01/	

						-2.7%
IS	tratum.Viewer					12.4%
	test and second 1-54 million					17.4% .8%
	MPM Production Operations		MAX	0	COCO 1 to 29 of 29	
	MPM Manufacturing Performance					12.1%
	The relation of the relation o	💷 – View Name: Cus		tation by Lifetime	Revenue	4.7%
	MPM Variance Reporting	↓ → Yiew Filter >>				13.9%
	My Views	Customer SoldTo	▼ Sales Revenue	Customer Segment		
		150100	\$167,233,502	A		
	SRMA Buyer Performance	150110	\$150,186,809	A		
	SRMA Vendor Payment History	150150	\$98,258,541	A		
	SRMA Purchasing Performance	150180	\$69,787,953	A		
		150120	\$52,070,099	A		
	SRMA Supplier Performance	150170	\$46,462,609	A		
	SRMA Pricing Analysis	150160	\$42,652,522	A		
		150240	\$38,658,353	A		
	SRMA AP Aging	150130	\$38,465,491	A		
	SPM S&OPs Sales Input	150230	\$24,892,799	A		
		150250	\$22,422,495	В		
	CRMA Customer Management	150140	\$20,356,034	В		
	IPM Inventory Case Views	150370	\$14,949,571	В		
		150350	\$13,664,559	В		
	SPM Sales Planning & Analysis	150320	\$12,424,285	В		
	CDM 0 AD A A-i	150360	\$11.976.204	В		

Customer Segmentation

After identifying your most valuable customers, Stratum CRM-A allows you to further profile, segment and rank these customers so they can be targeted for additional sales opportunities. You can apply specialised metrics to segment customers and then build specific promotions or sales efforts around select customer groups. Afterwards, easily track

sales generated from promotional activities and compare them to your planned sales.

- Segment customers by Propensity to Buy (PTB) to determine those customers most likely to purchase new products or more existing products. The PTB metric is customised to accommodate those factors most relevant to your business model and may incorporate previous sales volume, seasonal trends, regional sales, etc.
- Rank customers based on the recency of their purchases, frequency of their orders and the value of their purchases and then segment them into groups and design promotions and sales efforts to target each group with up sell and cross sell promotions.
- Isolate customers into "opportunity groups" based on purchasing behaviour, such as customers that bought from you last year but did not buy this year.
- Compare actual to expected results by campaign to measure campaign effectiveness and associated costs and refine programs for future campaigns.
- Import campaign or sales transactions from your contact management system, if you are currently using one, to track results and measure sales revenue generated.

FUNCTIONS	KEY ELEMENTS (ANALYZED or PLANNED)	MEASURES / REPORTS (INCLUDED)	BENEFITS
Potential & Historical Analysis	Opportunity Analysis Pipeline Analysis Propensity to Buy Campaign Management	Opportunity Analysis Propensity to Buy Campaign Effectiveness	Increased sales focus Improved revenue More effective campaigns

	annel Sales Volume Compar Y Division		😫 1 to 8 of 8	000 0 1 t	o 10 of 24
	♥ Customer SoldTo >>	150120]		
	SIdTo Long Description >>				
Product Category	PCat Long Description	YTD Sales Amount	LYTD Sales Amount	Growth/Decline %	Sales Amour Growth/Decline In
<u>201</u>	Canned Fruit	\$4,966,907	\$3,908,316	27%	
200	Fresh Vegetables	\$2,492,555	\$2,026,003	23%	
<u>204</u>	Fresh Fruit	\$1,884,742	\$1,517,719	24%	
<u>208</u>	Frozen Prepared Dinners	\$1,682,907	\$1,375,851	22%	
203	Beef	\$980,806	\$750,028	31%	
202	Pork	\$834,215	\$653,950	28%	
207	Frozen Fruit Products	\$711,084	\$543,770	31%	
Grand Total		\$13,553,216	\$10,775,637	26%	

	Y v LY by Month Revenue &				🚺 1 to 10 of				
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Tustomer Sold	To SIdTo Short Description	۳ Months >>	January	February	March	April	May	June	July
150100	Wilder Foods Eastern A	YTD Sales Amount	\$4,960,230	\$4,334,553	\$4,870,827	\$4,728,499	\$4,465,158	\$5,420,399	\$6,620,75
		LYTD Sales Amount	\$3,793,117	\$3,314,658	\$4,113,814	\$3,615,911	\$3,315,752	\$3,927,449	\$4,149,28
		Sales Amt VAR %	31%	31%	18%	31%	35%	38%	60
		Sales Amount Trend		A					
		Sales Units VAR %	31%	31%	19%	31%	35%	38%	61
		YTD Gross Margin	\$1,150,434	\$1,011,386	\$1,142,947	\$1,106,856	\$1,038,980	\$1,257,012	\$1,532,93
		LYTD Gross Margin	\$915,600	\$814,192	\$998,754	\$889,526	\$810,001	\$966,762	\$1,009,04
		Gross Margin VAR %	26%	24%	14%	24%	28%	30%	52
		GM Trend							
150110	Wilder Foods Western A	YTD Sales Amount	\$4,267,704	\$3,814,523	\$4,576,719	\$4,310,442	\$4,053,583	\$4,616,098	\$5,913,84
		LYTD Sales Amount	\$3,263,538	\$2,916,988	\$3,853,787	\$3,296,220	\$2,881,932	\$3,500,842	\$3,577,29
		Sales Amt VAR %	31%	31%	19%	31%	41%	32%	65
		Sales Amount Trend		A			▲		
		Sales Units VAR %	31%	31%	19%	31%	38%	35%	65
		YTD Gross Margin	\$989,246	\$889,070	\$1,074,248	\$1,001,521	\$943,241	\$1,069,379	\$1,377,03
		LYTD Gross Margin	\$841,708	\$779,527	\$1,055,671	\$867,842	\$739,793	\$970,980	\$909,06
		Gross Margin VAR %	18%	14%	2%	15%	28%	10%	51
		GM Trend							
150120	Sumpter Dist'n Eastern	YTD Sales Amount	\$1,363,885	\$1,330,027	\$1,372,872	\$1,362,333	\$1,581,999	\$1,395,111	\$1,933,92
		LYTD Sales Amount	\$1,042,971	\$1,017,079	\$1,188,695	\$1,041,784	\$1,125,717	\$1,059,857	\$1,322,17
		Sales Amt VAR %	31%	31%	15%	31%	41%	32%	46
		Sales Amount Trend	A						

Customer Management

Stratum CRM-A supports efforts to improve customer service levels by supplying you with the information you need to make informed decisions that put the customer first. Plus, you'll understand the impact that order fulfilment, returns and call centre activity have on sales performance and have the insight needed to help you improve performance in these areas.

- Identify customer and product return patterns over time to uncover potential problem areas and measure the impact of returns on revenue. Explore product quality issues with the Manufacturing Performance Management module.
- Compare order fill rates and order line fill rates this year versus last to determine if company goals are being met and what is causing any variances to plan.
- Improve customer service by analysing what products are causing backorders and the duration of backorders, so that problems can be remedied and customer expectations met.
- Rank and measure the severity and type of customer complaints, as well as how effectively customer service representatives are responding to these complaints, to increase customer service levels.
- Review year-to-date sales revenue and problems reported by customers to identify any correlation and understand how customer service issues are impacting profits.

FUNCTIONS	KEY ELEMENTS (ANALYZED or PLANNED)	MEASURES / REPORTS (INCLUDED)	BENEFITS
Order Fulfillment Analysis	Problem Analysis Fill Rates Returns On-Time Delivery	Return Patterns Return Impact on Revenue Return Reason Ranking Order Fill Rate Order Line Fill Rate Order Shipment Rate Backorder Duration Problem Severity Ranking CSR Performance Problem Impact on Sales	Increased custome service levels Better management returns

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MPM	1 Manufacturing Performance							100 01 10				
	1 Variance Reporting	Filt Filt		F								
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SRM	IA Buyer Performance	Account Typ	e Acct Typ De	sc <u>Custome</u>		Parent Des	sc 1 Pro	duct Cate	eqory PCat Short D		Sales Amount	Ret
SRM	IA Vendor Payment History	90	National	5000	W	/ilder Foods	200		Fresh Vegetable	s	\$3,778,7	
SRM	A Purchasing Performance						201		Canned Fruit Pork		\$73,979,6 \$1,603,1	
SRM	IA Supplier Performance						203		Beef		\$1,290,0	
SPM	IA Pricing Analysis						204		Fresh Fruit		\$2,576,2	69
							207		Frozen Fruit Pro		\$927,0	
	IA AP Aging	1-					208	5000	Frozen Preparec	Dinners	\$2,805,9 \$86,960,90	
SPM	5&OPs Sales Input	-						5000	Total		\$00,500,50	
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atum.View	er										139,8	
	20000					Inna		_			719,8	
	19227 <u>—</u>			79 1 to	27 of 27	000	1 to	o 189 of	189		149,5	
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→ View Filter	>> Variable SoldTo >>	<u>150390</u>							<u>150380</u>		37,6 3 053,6 256,0	58 23 54
→ View Filter	>>	<u>150390</u>							<u>150380</u> Packingham Foods		37,6)53,6 256,0 500,2	58 23 54 43
→ View Filter	>> V <u>Customer SoldTo</u> >> SldTo Short Description >>	<u>150390</u> Pacific Providers Performance to	Fill Rate Performance	Units Ordered	Total Shipped	On Time Shipped	Early Shipped	Late Shipped		Fill Rate Performance	37,63 153,6 256,0 500,2 322,0 UF 849,0 UF	58 23 54 43 59 76 11
→ View Filter	>> V <u>Customer SoldTo</u> >> SldTo Short Description >>	<u>150390</u> Pacific Providers Performance to Cust Request	Performance			Shipped		Shipped	Packingham Foods Performance to Cust Request Date	Fill Rate Performance	87,62 053,6 256,0 00,2 322,0 UF 49,0 Ord 739,2 177,92	58 23 54 43 59 76 11
Yiew Filter Year Months 006	>> V Customer SoldTo >> SIdTo Short Description >> Months	<u>150390</u> Pacific Providers Performance to Cust Request Date	Performance	Ordered	Shipped	Shipped 2,457	Shipped	Shipped	Packingham Foods Performance to Cust Request Date	Fill Rate Performance 94%	87,63 153,6 256,0 600,2 322,0 122,0 149,0 0rd 177,92	58 23 54 43 59 76 11
Yiew Filter Year Months 006	>> V Customer SoldTo >> SIdTo Short Description >> Months January	150390 Pacific Providers Performance to Cust Request Date 90%	Performance 94% 94%	Ordered 2,731	Shipped 2,570	Shipped 2,457 2,162	Shipped 25	Shipped 88 114	Packingham Foods Performance to Cust Request Date 87% 91%	Fill Rate Performance 94% 94%	37,69 153,6 256,0 300,2 322,0 Ur 449,0 Ord 39,2 177,92	58 23 54 43 59 76 11
• View Filter	>> Vestimer SoldTo >> SldTo Short Description >> Months January February	150390 Pacific Providers Performance to Cust Request Date 90% 88%	Performance 94% 94%	Ordered 2,731 2,453	Shipped 2,570 2,307	Shipped 2,457 2,162 3,702	Shipped 25 31	Shipped 88 114 140	Packingham Foods Performance to Cust Request Date 87% 91% 89%	Fill Rate Performance 94% 94% 95%	37,69 153,6 256,0 300,2 322,0 449,0 Ord 39,2 177,92	58 23 54 43 59 76 11
• View Filter • <u>Year Months</u>	>> SldTo Short Description >> Months January February March	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90%	Performance 94% 94% 94% 95%	Ordered 2,731 2,453 4,130	Shipped 2,570 2,307 3,892	Shipped 2,457 2,162 3,702 3,523	Shipped 25 31 49 48	Shipped 88 114 140	Packingham Foods Performance to Cust Request Date 87% 91% 89% 87%	Fill Rate Performance 94% 94% 95% 92%	37,69 153,6 256,0 322,0 UF 329,0 Ord 139,2 177,92	58 23 54 43 59 76 11
• Yiew Filter * Year Months	>> V Customer SoldTo >> SIdTo Short Description >> Months January February March April	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 90%	Performance 94% 94% 94% 95%	Ordered 2,731 2,453 4,130 3,904	Shipped 2,570 2,307 3,892 3,705	Shipped 2,457 2,162 3,702 3,523 4,136	Shipped 25 31 49 48	Shipped 88 114 140 134	Packingham Foods Performance to Cust Request Date 87% 91% 89% 87% 90%	Fill Rate Performance 94% 94% 95% 92% 95%	37,61 053,6 256,0 222,0 UP 49,0 Ord 239,2 Ord 277,9:	58 23 54 43 59 76 11
* View Filter Year Months	>> Vestimer SoldTo >> SIdTo Short Description >> Months January February March April May	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 90% 91%	Performance 94% 94% 95% 95% 95% 94%	Ordered 2,731 2,453 4,130 3,904 4,534	Shipped 2,570 2,307 3,892 3,705 4,304	Shipped 2,457 2,162 3,702 3,523 4,136 3,176	Shipped 25 31 49 48 44	Shipped 88 114 140 134 124 119	Packingham Foods Performance to Cust Request Date 87% 91% 89% 87% 90% 87%	Fill Rate Performance 94% 94% 95% 92% 95% 93%	37,61 053,6 256,0 00,2 222,0 22,0 2,0	58 23 54 43 59 76 11
* View Filter	>> SldTo Short Description >> Months January February March April May June	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 90% 91%	Performance 94% 94% 95% 95% 95% 94%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534	Shipped 2,570 2,307 3,892 3,705 4,304 3,336	Shipped 2,457 2,162 3,702 3,523 4,136 3,176	Shipped 25 31 49 48 44 44	Shipped 88 114 140 134 124 119 106	Packingham Foods Performance to Cust Request Date 87% 91% 89% 87% 87% 87% 87%	Fill Rate Performance 94% 94% 95% 92% 95% 93% 94%	37,61 053,6 256,0 900,2 222,0 22,0 22,0 22,0 22,0 222,0 2,0	58 23 54 43 59 76 11
* View Filter	>> V Customer SoldTo >> SIdTo Short Description >> Months January February March April May June June July	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 90% 90% 90% 88%	Performance 94% 94% 95% 95% 95% 94% 92% 94%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534 2,847	Shipped 2,570 2,307 3,892 3,705 4,304 3,336 2,606	Shipped 2,457 2,162 3,702 3,523 4,136 3,176 2,457 4,666	Shipped 25 31 49 48 44 41 43 75	Shipped 88 114 140 134 124 119 106	Packingham Foods Performance to Cust Request Date 87% 87% 87% 87% 87% 87% 87% 87%	Fill Rate Performance 94% 94% 95% 92% 95% 93% 94%	97,61 053,6 256,0 222,0 22,0,0 22,0 20,0 20,0 20,0 20,0 20,0 20,0 20,0 20,0 20,0 20,0 20,0 20,0,	58 23 54 43 59 76 11
* View Filter	>> SldTo Short Description >> Months January February March April May June July August	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 90% 91% 88% 86%	Performance 94% 94% 95% 95% 95% 94% 92% 94%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534 2,847 5,250	Shipped 2,570 2,307 3,892 3,705 4,304 3,336 2,606 4,921	Shipped 2,457 2,162 3,702 3,523 4,136 3,176 2,457 4,666 5,056	Shipped 25 31 49 48 44 41 43 75 71	Shipped 88 114 140 134 124 119 106 180	Packingham Foods Performance to Cust Request Date 87% 91% 87% 87% 87% 87% 87% 87% 87% 87	Fill Rate Performance 94% 95% 92% 95% 93% 94% 95%	97,61 153,6 256,0 260,2 22,0 00,2 22,0 00,2 23,0 77,9 23,7 23,7 24,9 0 77,9 23,6 23,6 24,0 24,0 24,0 24,0 24,0 24,0 24,0 24,0	58 23 54 43 59 76 11
* View Filter	>> SldTo Short Description >> SldTo Short Description >> Months January February March April May June July August September	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 91% 90% 86% 88%	Performance 94% 94% 95% 95% 95% 92% 92% 94% 94% 94% 94%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534 2,847 5,250 5,661	Shipped 2,570 2,307 3,892 3,705 4,304 3,336 2,606 4,921 5,350	Shipped 2,457 2,162 3,702 3,523 4,136 3,176 2,457 4,666 5,056 3,100	Shipped 25 31 49 48 44 41 43 75 71 71 74	Shipped 88 114 140 134 124 119 106 180 223 220	Packingham Foods Performance to Cust Request Date 87% 91% 87% 87% 87% 87% 87% 87% 87% 87	Fill Rate Performance 94% 95% 92% 95% 93% 94% 95% 93%	97,61 053,6 256,0 220,0 220,0 249,0 0rd 239,2 0rd 239,2 177,9	58 23 54 43 59 76 11
Year Months	>> SldTo Short Description >> SldTo Short Description >> Months January February March April May June July August September October	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 90% 90% 90% 88% 89% 89% 89%	Performance 94% 94% 95% 95% 95% 92% 92% 94% 94% 94% 94%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534 2,847 5,250 5,661 3,635	Shipped 2,570 2,307 3,892 3,705 4,304 3,336 2,606 4,921 5,350 3,393	Shipped 2,457 2,162 3,702 3,523 4,136 3,176 2,457 4,666 5,056 3,100 3,112	Shipped 25 31 49 48 44 41 43 75 71 71 74	Shipped 88 114 140 134 124 119 106 180 223 220	Packingham Foods Performance to Cust Request Date 87% 91% 87% 87% 90% 87% 88% 92% 88% 92% 88% 92%	Fill Rate Performance 94% 95% 92% 92% 93% 93% 94% 93% 93%	97,61 03,6 255,0 00,2 22,0 00,2 39,2 0rd 177,9	58 23 54 43 59 76 11
* View Filter	>> SldTo Short Description >> SldTo Short Description >> Months January February March April May June July August September October November	150390 Pacific Providers Performance to Cust Request Date 90% 90% 90% 90% 90% 88% 89% 88% 88%	Performance 94% 94% 95% 95% 95% 92% 92% 94% 94% 94% 94% 94% 94%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534 2,847 5,250 5,661 3,635 3,492 5,142	Shipped 2,570 2,307 3,892 3,705 4,304 3,336 2,606 4,921 5,350 3,393 3,347 4,887	Shipped 2,457 2,162 3,702 3,523 4,136 3,176 2,457 4,666 5,056 3,100 3,112 4,729	Shipped 25 31 49 48 44 41 43 75 71 74 50 35	Shipped 88 114 140 134 124 119 106 180 223 220 186 124	Packingham Foods Performance to Cust Request Date 87% 87% 87% 87% 87% 87% 87% 87%	Fill Rate Performance 94% 95% 92% 92% 93% 93% 93% 93% 95%	97,61 033,6 255,0,0 222,0 200,2 220,0 200,2 220,0 200,2 220,0 200,2 220,0 200,2 200,	58 23 54 43 59 76 11
✓ View Filter 7 Year Months 006	>> SldTo Short Description >> SldTo Short Description >> Months January February March April May June July August September October November December	150390 Pacific Providers Performance to Cust Request Date 90% 88% 90% 91% 90% 86% 89% 85% 85% 85%	Performance 94% 94% 95% 95% 95% 94% 92% 94% 94% 94% 93%	Ordered 2,731 2,453 4,130 3,904 4,534 3,534 2,847 5,250 5,661 3,635 3,492	Shipped 2,570 2,307 3,892 3,705 4,304 3,336 2,606 4,921 5,350 3,393 3,347	Shipped 2,457 2,162 3,702 3,523 4,136 3,176 2,457 4,666 5,056 3,100 3,112 4,729	Shipped 25 31 49 48 44 41 43 75 71 74 50	Shipped 88 114 140 134 124 119 106 180 223 220 186 124	Packingham Foods Performance to Cust Request Date 87% 87% 87% 87% 87% 87% 87% 87%	Fill Rate Performance 94% 95% 92% 93% 93% 93% 93% 93% 95% 93% 95% 95% 95% 95% 94%	51 51 55 56 56 56 56	58 23 54 43 59 76 11

The Multiple Planning, Analysis & Reporting Options of Stratum

Leverage Pre-Defined Analysis & Reporting

Stratum lets you gain an immediate return on investment by providing hundreds of pre-built business views and reports that are easily configured to your business. Plus, it's ready to accommodate you with a modular approach that lets you extend its analyses and reports across the enterprise as you need them.

Powerful Planning Applications

Stratum reaches beyond the capabilities of other analysis and reporting solutions by letting you to model out and predict sales forecasts, pricing, inventory replenishment and more, using a collaborate budgeting and forecasting function.

Inquiry

You can leverage Stratum's powerful inquiry capabilities to drill down into a specific area to pinpoint the answers you need. Plus, you can view the data in graphical format, making the process of analysing the performance of your business faster and easier.

Quick KPIs

Stratum includes more than 500 pre-defined sets of Key Performance Indicator (KPI) measurements. These KPIs give executives and managers the ability to quickly identify your company's strengths and weaknesses and provide a starting point for performance improvement by showing whether or not your business is in line with its strategic objectives.

Alerts

With built-in alerts, you gain crucial monitoring, proactive notification and automation capabilities that help your company

adapt to changing conditions and avoid alarming scenarios pertaining to payables, receivables, budgets, sales, and inventory. Pre-set any number of business rules and let Stratum protect you from failing to respond to deviations from acceptable levels by automatically sending alerts to those people who can take immediate action.

Dashboards

Stratum also offers dashboarding capabilities to give your executives a one-stop, graphical snapshot of the business's health. Our dashboards are easy to understand, often highlighting important KPIs, revenues by period, product sales by category, actual vs. budgeted financial indicators and expenses by category, to name just a few. We've also made it easy for you to include Stratum dashboards on portal pages.

Flexible Information Delivery

The options you have for delivering Stratum analyses and reports to the corporate office, plant floor, remote sales reps, customers and supply chain partners are virtually endless. You'll find that it's an ideal solution for power users who require the ability to plan, forecast and drill deeply into your organisation's performance data ... and that it's perfect, too, for more casual users who simply require browser-based access to their performance metrics!

Flexible Reporting

When you wish to send static reports of your operational analyses to internal users, customers or suppliers, Stratum lets you automate the entire process of creating, generating and distributing great-looking reports. The reports can be saved in numerous formats like Adobe PDF and Microsoft Excel. Plus, they can be systematically scheduled for regular distribution by email to any user you desire, whether internal or external to your business.

Robust Data Repository

Stratum protects your current technology investment by integrating with and leveraging the data you already have in your ERP, CRM and other business systems. Our enterprise connectors allow you to easily extract, transfer and load your data into an enterprise data repository that ultimately becomes the "single version of the truth" for your entire business.