TABLEAU
CONFERENCE
Bristol-Myers Squibb O2C Americas
Achieving Operational Excellence Using Tableau

Amanda Haas-Latib
She/her/hers

Manager, Operational Excellence
O2C Operations, Americas
Bristol-Myers Squibb

#data19
1. Background: Order-to-Cash (OTC) Operational Excellence

2. Use Cases: Report automation, operational controls, metrics, root-cause analysis, stakeholder communication


4. Building a Metrics-Driven Organization: Develop, Analyze, Govern, Take Action

***Note: All data presented herein, including brand names, customers, and financial figures, have been changed for demonstration purposes only.***
Background
Background: Order-to-Cash Operations

Geography:
- North America markets
- Latin America markets

Main Pillars:
- Master Data
- Customer Service
- Sales Order Management
- Invoicing & Collections
- Credit Management
- Accounts Receivables
Background: A Journey to Operational Excellence

Evolution:

**Established**
- Functional; established data integration and processes
- Continued inherited transactional tasks

**Streamlined**
- Internal collaboration
- Implemented controls
- Consolidated regional activities
- Department-driven

**Evolved Data Strategy**
- Deployed initial analytics tools
- Created initial Tableau capability
- Automated financial calculations
- Automated reporting
- Minimal SAP/transactional tasks
- Fostered CI framework
- Established metrics and governance
- Stakeholder alignment

2014-2015
2016-2017
2018
2019 on
Ops Excellence / Added Value Insight
Tableau Use Cases
Data is Data.

Or is it???
Tableau Use Cases

Report Automation:
• Reduce/eliminate manual effort
• Enhance stakeholder relations
• Enhanced customer experience

Operational Controls:
• Highlight deviations
• Flag outliers

Metrics:
• Illustrate goals, trends, progress
• Root-cause analysis (Why? How? Action.)
Report Automation: Outcome

Speed:
- Live SAP HANA connection
- No manual data compilation

Cost Savings & Avoidance:
- Internal ownership
- Reduced labor hours
- Eliminated process waste

Data Integrity:
- No manual data manipulation
- No data lag

Global Impact:
- Leverage across geographies
Operational Controls

- Audit Requirements
- Pre-close Activities
- Set Control:
  - Threshold
  - Outlier identification
Metrics & Measures

- Volume trends
- Financial trends
- Root-cause
- Actuals vs. Budget
- Communication
- Overlays
Order-to-Cash Application
Your data should make you DIE!
D
Describe – facts

I
Interpret – What does it mean?

E
Evaluate – Does it even matter?
O2C Application: Sales

Product Sales:
- Actuals vs. Projections
- Customer activity
- Trends
- Variables & Correlations
- Inventory analytics
  - Control chart
O2C Application: Accounts Receivables

Accounts Receivables:
- Monthly AR Trend
- Customer Balances
- % Past Due
- Open balance
O2C Application: Product Returns

Product Returns:
- Identify trends
- Highlight deviations
- Flag outliers
- Trends: Sales vs. Returns

[DEMO]
O2C Application: Financial Adjustments

Billing Date

Detail View:
*Click on any amount above to view transaction detail.

<table>
<thead>
<tr>
<th>Sales Document</th>
<th>Billing Document</th>
<th>Billing Date</th>
<th>Sold-to party</th>
<th>Sold-To Name</th>
<th>Created By</th>
<th>Order Reason</th>
<th>Number of Records</th>
<th>Net Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2505822713</td>
<td>12/10/2018</td>
<td>00000001</td>
<td>Amanda's Pharmacy</td>
<td>User1</td>
<td>310</td>
<td></td>
<td>3</td>
<td>10,398,949</td>
</tr>
<tr>
<td>2505823905</td>
<td>12/10/2018</td>
<td>00000002</td>
<td>Desi's Dispensary</td>
<td>User1</td>
<td>138</td>
<td></td>
<td>2</td>
<td>74,682</td>
</tr>
<tr>
<td></td>
<td></td>
<td>663</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
O2C Application: Financial Adjustments

Outlier Analysis:
*Use Outlier Parameter to input outlier threshold.

Value Range
- Less than 1,000: 989
- 1,001 - 5,000: 570
- 5,001 - 10,000: 291
- 10,001 - 100,000: 486
- 100,001 - 500,000: 265
- 500,001 - 1,000,000: 98
- 1,000,001 - 5,000,000: 119
- 5,000,001 - 10,000,000: 5
- Grand Total: 1,200

Outlier Parameter: 2,000,000

Within threshold
O2C Application: Logistics

- Ship-to analyses
- Product distribution
- Routing & staffing
- Shortage/Damage claims
- Freight Charge thresholds
O2C Application: Regional Market Views

- Volume distribution
- Maps
- Comparison
- Regional vs. Market
- High-level → low-level
Metrics & Measures List

- Order volume
- AR balance
- Customer composition
- Brand & customer sales
- Product returns
- Team productivity
- Telephony
- Order automation rates
- Delivery automation rates
- Invoice automation rates
- Order management
- Credit/debit adjustments
- Inventory management
- Project status tracking
Building a Metrics-Driven Organization
Building a Metrics-Driven Organization

Step 1: What should be measured?
- Determine which metrics should be monitored
- Develop suite ➔ self-service

Step 2: Develop & Analyze
- Compile datasets and established trends for all pertinent metrics; create templates for auto/easy update
- Analytics ➔ Reports

Step 3: Governance
- Determine review frequency; including commentary
- Establish communication method (e.g. executive vs. operational)

Step 4: Set Goals
- Goals/thresholds to be set for applicable metrics (Q2)

Step 5: Take Action
- New business rule
- Corrective action
- Preventative action
It didn’t happen unless someone knows about it. Communicate!
Questions?
Please complete the session survey in the mobile app

View ‘My Evaluations’ in the menu or find your session under ‘Schedule’
Thank You

Amanda.Haas@bms.com
TABLEAU
CONFERENCE
Total Bars: Ref Line (sum per cell)

Top Brands vs. “All Other”: Use Sets if static