



Management by Exception: How-To Use an MBE to Manage Exceptions in Your Business

2019 AFS USER CONFERENCE

*“Enhancing the Value of Today’s Consumer Goods Manufacturers and
Distributors Through Advanced Analytics - WiiFM”*



Speaker Introduction

DAVID FRANKLIN, DIRECTOR, AFS G2 ANALYTICS



David Franklin brings more than 30 years of strong CPG and Food Service industry experience to AFS Technologies with a background in CPG merchandising, sales call reporting, category management, and trade promotion management software and systems support. He also has solid hands-on and management experience in software development and information technology which gives him unique insight into the infrastructure supporting the SAAS systems at AFS as well as AFS customer systems. He and his team are committed to providing excellent service to customers that have purchased AFS products and services.

David Franklin | 972-715-4088 | davidfr@afsi.com

Speaker Introduction

HEATH ROBINSON, DIRECTOR, AFS G2 ANALYTICS



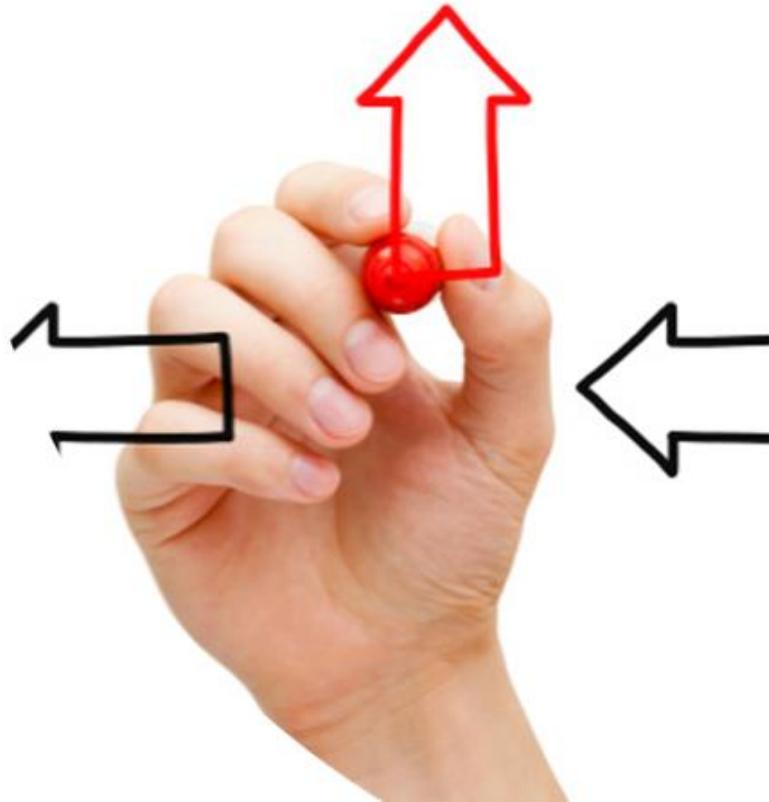
Heath Robinson brings more than 20 years of strong CPG and Food Service industry experience to AFS Technologies. Heath and his team are committed to providing excellent service to customers that have purchased AFS products and services.

Heath Robinson | 972-715-4072 | heathr@afsi.com

Agenda

- Management by Exception (MBE) Overview
- Setting up an MBE
- Scheduling your MBEs for timely use
- How is an MBE different from a scheduled report?
- Sample MBE alerts
- Live Demo: How-To Set-Up an MBE

MBE Overview



As your organization grows, you'll need to find ways to identify issues and correct them quickly.

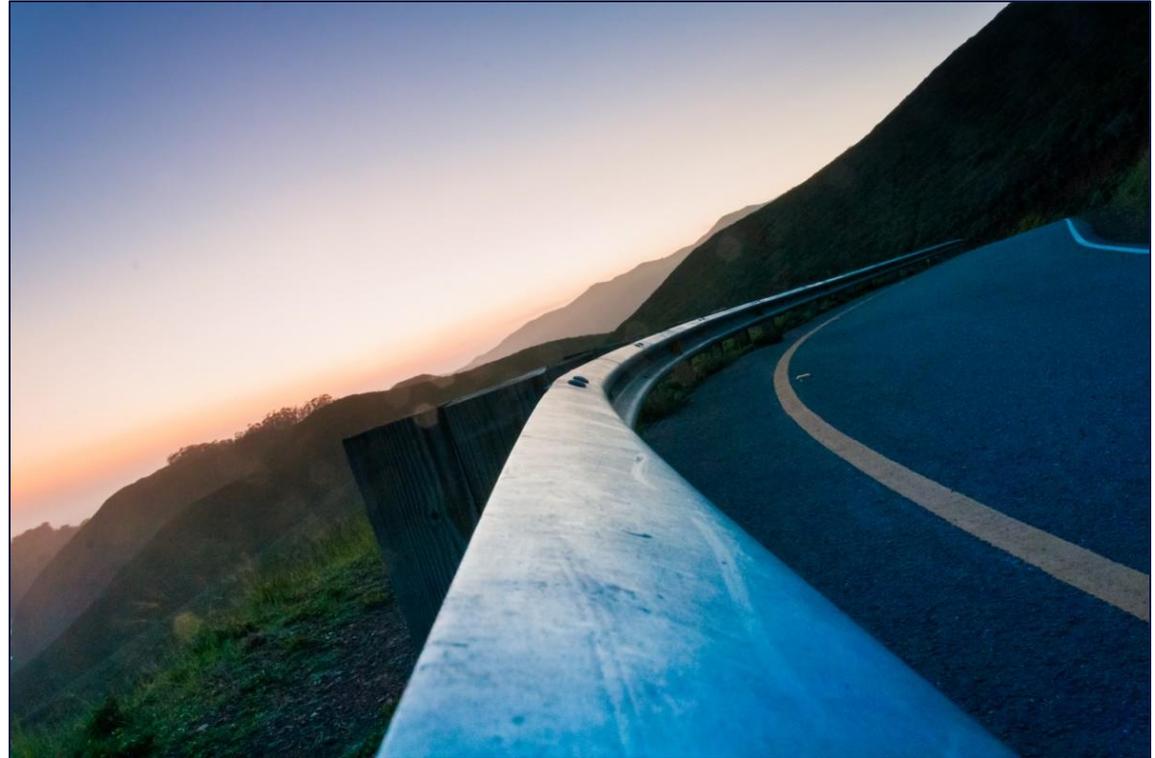
Management by Exception (MBE) is a practice where only significant deviations from a standard are brought to the attention of users.

The idea behind it is that management's attention will be focused only on those areas in need of action. When they're notified of variance, users can focus on the specific issue and quickly correct it.

If nothing is triggered, then everything is going according to plan!

How is an MBE different from a scheduled report?

An MBE can be configured to only trigger based on your guardrail criteria. It will then notify you when a deviation is detected in your data, making it an **alert** rather than a regular report.



How-To Set-Up an MBE

Create a Filter that will notify you of a variance in your data

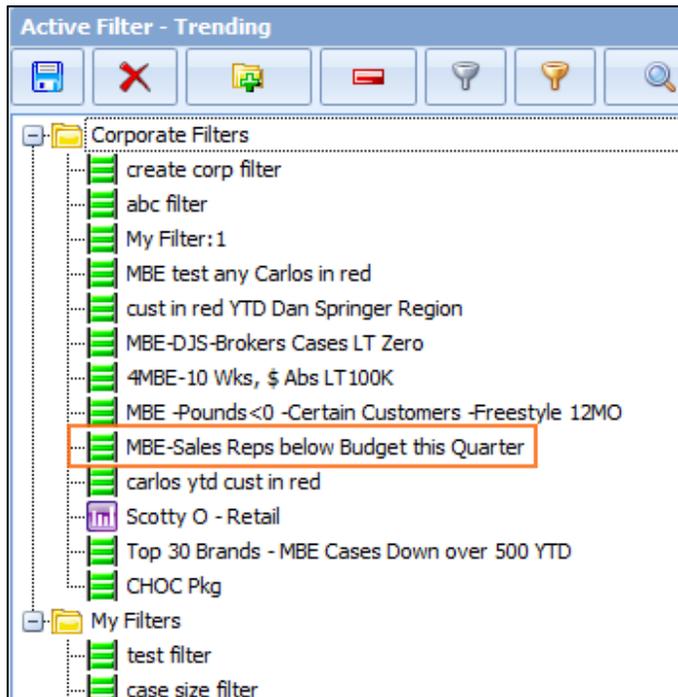
Go through a 4-panel set-up to configure your MBE

MBEs are evaluated at a set time and if results are returned, the MBE is activated

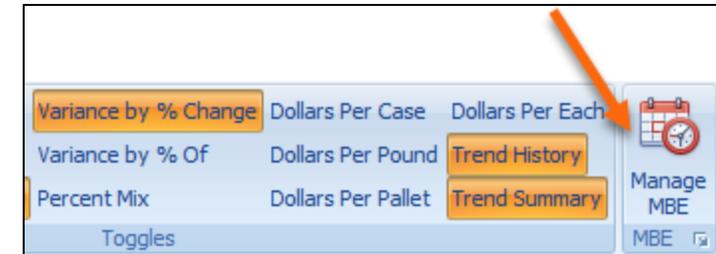
User(s) are notified by email or text

Setting up an MBE

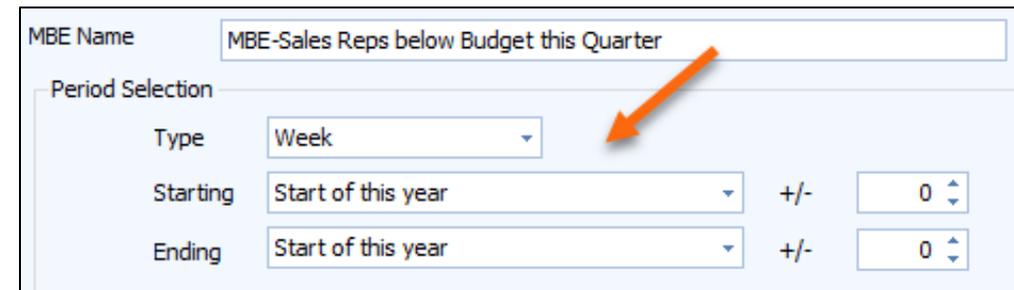
- 1 Create a Corporate-style filter. This will allow you to pre-filter the data to what matters to you. To define and save a Corporate filter, include a numeric column filter set to indicate when one of the measures you're interested in goes out of bounds.



- 2 To manage the MBE, open the MBE panel by clicking on the Manage MBE icon in the top ribbon bar.



- 3 Choose your time frame in the Date Selection tab.



Setting up an MBE, cont.

- 4 Select how the MBE will be output and add the corresponding message information and/or attachments (via email or text messaging).

Management By Exception - MBE-Sales Reps below Budget this Quarter

Getting Started | Filter/MBE Selection | Date Selection | **MBE Output** | MBE Timing | MBE Recipients | History

Send High Priority(email)

Subject
AFS G2 Analytics MBE Exception Report - {MBE Name} - {DateTime} - Results {Number of R

Notification Body

AFS G2 Analytics MBE Exception Report - {MBE Name} - {DateTime}

<u>Notification: </u> One of your MBE's was triggered

MBE Name : {MBE Name}
Hierarchy : {Hierarchy}
Period Type : {Period Type}
Period Range: {Period Start} - {Period End}
MBE Filter : {MBE Filter}
Filtered Conditions: {Criteria}

{Results Table:xxx}

{Investigation Links}

Include Links To

Destination Filter/Solution tab

- View
 - Sales
 - Gross Profitability
 - Trade Spending
 - Promo Analysis
 - Deduction Aging
 - Commissions
- Corporate Filters
 - create corp filter
 - abc filter
 - My Filter: 1
 - MBE test any Carlos in red
 - cust in red YTD Dan Springer Region
 - MBE-DJS-Brokers Cases LT Zero
 - 4MBE-10 Wks, \$ Abs LT100K
 - MBE -Pounds<0 -Certain Customers -Free...
 - MBE-Sales Reps below Budget this Quarter
 - carlos ytd cust in red
 - Scotty O - Retail

Include Details (email results) []

Help
Set up what the notification email will look like. Add to the provided template if you want to customize the look. Next, choose if you want to include additional details such as the view or the filter conditions.

Save Cancel

Setting up an MBE, cont.

- 5 Define the schedule/timing and recurrence range for your MBE to run. You could choose it to run every time data is imported or at a specific time, e.g., every weekday at 11:00 AM.

Management By Exception - MBE-Sales Reps below Budget this Quarter

Getting Started | Filter/MBE Selection | Date Selection | MBE Output | **MBE Timing** | MBE Recipients | History

Each Time data is imported or updated

At specific time 12:00 AM Time Zone

Recurrence Pattern

Daily

Weekly

Monthly

Recur Every 1 week(s) on:

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Range of Recurrence

Start 3/15/2019

End No Ending Date End After

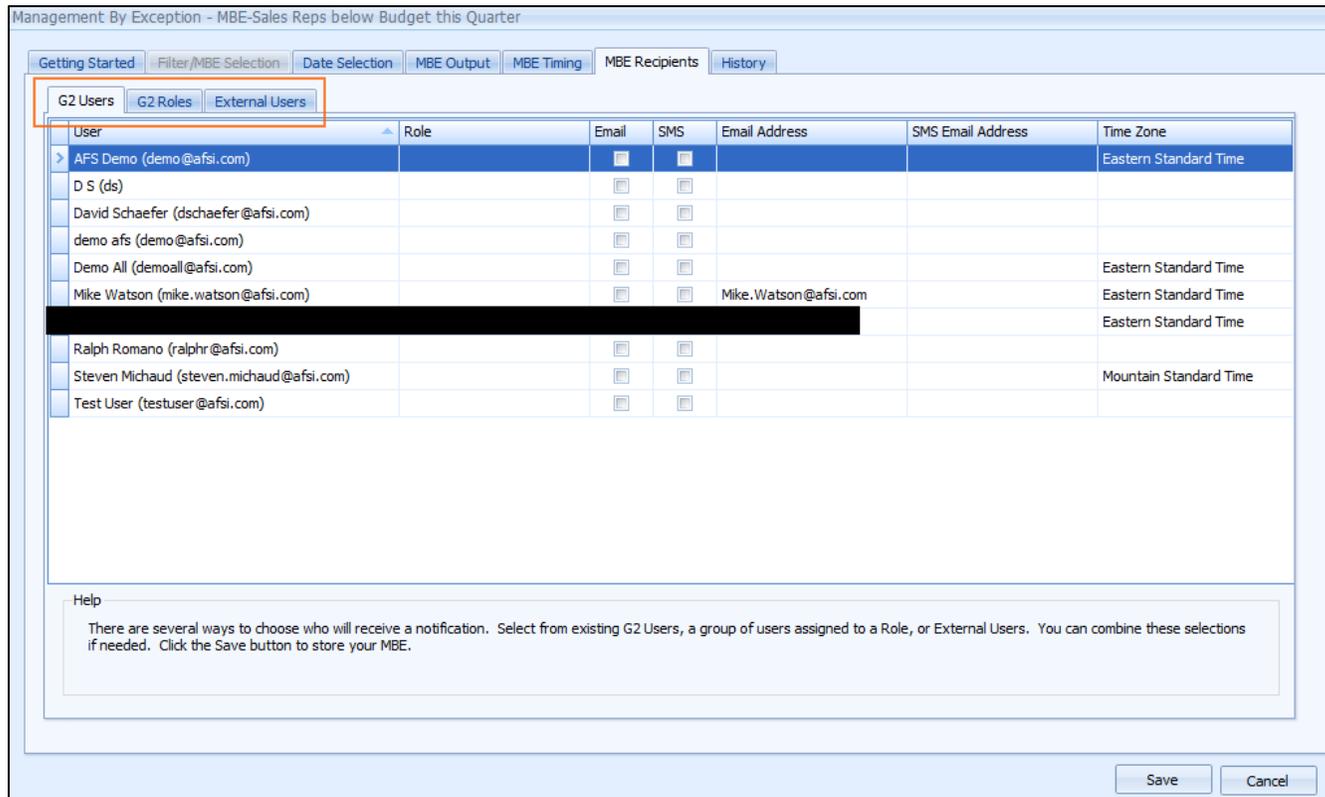
Help

Choose the time frame to run your MBE. For most customers, the best choice is to run when the data is imported.

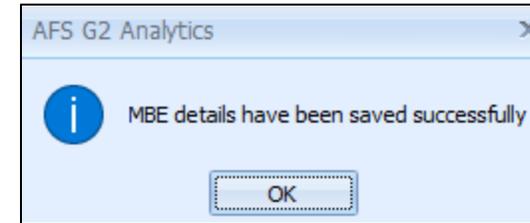
Save Cancel

Setting up an MBE, cont.

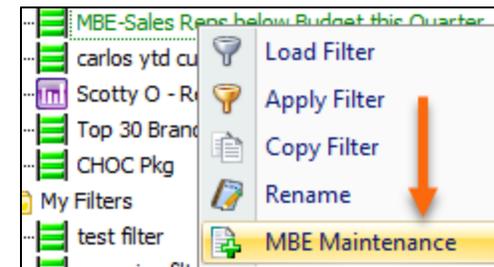
- 6 Choose the MBE recipients that you'd like to notify from the list of G2 users, G2 roles, or external users.



- 7 Save the configuration.



- 8 Once an MBE is triggered, a notification will be sent from G2 to those you've chosen to receive them. You can view your MBE history by right clicking on your Filter and selecting MBE Maintenance.



Sample MBE alerts

Email

.CSV file is attached

MBE criteria

Sample grid (shows max of 25 rows)

ID	Description	Current Cases	Last Year Cases	Abs Chg vs. Last Year Cases	Current Dollars	Last Year Dollars	Abs Chg vs. Last Year Dollars	Current Pounds	Last Year Pounds	Abs vs. Yr Po
223382424	SYSCO LOS ANGELES - CA	27,012	49,474	(22,462)	\$615,744	\$1,116,439	(\$500,695)	347,818	636,580	(288
223382623	SYSCO SEATTLE - WA	8,677	17,892	(9,215)	\$186,919	\$383,875	(\$196,956)	126,237	262,660	(136
223383423	SYSCO SMELKINSON - MD	3,373	8,197	(4,824)	\$65,846	\$168,514	(\$102,667)	35,321	106,509	(71
242502221	SYSCO NOBEL - DENVER - CO	14,444	23,710	(9,266)	\$251,766	\$423,448	(\$171,681)	153,182	260,077	(106
242502320	SYSCO NOBEL - NEW MEXICO - NM	4,189	9,987	(5,798)	\$86,433	\$202,217	(\$115,784)	71,333	165,648	(94
243492223	AFFILIATED FOODS - FSV - TX	30,858	59,604	(28,746)	\$822,880	\$1,614,094	(\$791,214)	451,613	865,490	(413
244052223	SYSCO COCHRAN FOOD SERVIC - MS	1,935	6,975	(5,039)	\$36,572	\$151,456	(\$114,884)	24,778	112,534	(87
246242225	SYSCO FOOD SERVICES - HOU - TX	988	8,595	(7,607)	\$22,898	\$171,863	(\$148,965)	15,293	116,891	(101
247642225	SYSCO FOOD SVCS SAN ANTON - TX	7,856	19,182	(11,326)	\$170,191	\$402,584	(\$232,393)	132,109	328,873	(196
275262224	SYSCO ALBANY - NY	6,025	12,311	(6,286)	\$107,312	\$235,181	(\$127,869)	61,441	131,493	(70
323192223	STANZ CHEESE CO - IN	6,141	11,042	(4,901)	\$162,424	\$267,868	(\$105,445)	88,567	151,669	(63
324082224	SYSCO DALLAS - TX	24,545	44,703	(20,158)	\$458,352	\$820,644	(\$362,291)	293,320	542,046	(248
402242223	SYSCO BEAUMONT - TX	627	3,675	(3,048)	\$20,673	\$124,725	(\$104,052)	10,624	60,459	(49
453542226	SYSCO INTERMOUNTAIN FOOD - UT	6,456	12,800	(6,343)	\$113,048	\$227,919	(\$114,871)	68,566	143,277	(74
552482323	HONOR FOODS - PA	16,204	32,947	(16,743)	\$371,975	\$695,844	(\$323,869)	213,643	407,555	(193
572742223	SYSCO HARDIN'S FOOD SERVI - TN	5,624	12,051	(6,427)	\$149,179	\$321,359	(\$172,179)	94,729	197,080	(102
583702223	ABC DISTRIBUTOR	1,873	5,970	(4,097)	\$45,067	\$184,770	(\$139,704)	26,582	99,713	(73

Investigative links

Thursday, March 9, 2017

FRM:NoReply@afsi.com
 MSG:AFS G2 Analytics
 MBE Exception Report
 - 4MBE-10 Wks, \$ Abs
 LT100K - 3/9/2017 1:06:33
 PM - Results 17

Text Message

Improve Productivity with MBEs



You'll be able to schedule MBEs for timely use, ensuring that your Sales Reps receive the information at certain times each week. With MBEs, your meetings with Sales Reps and Vendors will become more productive, through easy access to specific sales insights.

Live Demo in G2: How-To Create an MBE

Contact Us

David Franklin | 972-715-4088 | davidfr@afsi.com

Heath Robinson | 972-715-4072 | heathr@afsi.com

THANK YOU!

Q & A

Next Session: How-To Find Unique Sales Opportunities with Void Matrix Reporting in G2



Microsoft



ZEBRA

Honeywell