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"

afs technologies

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

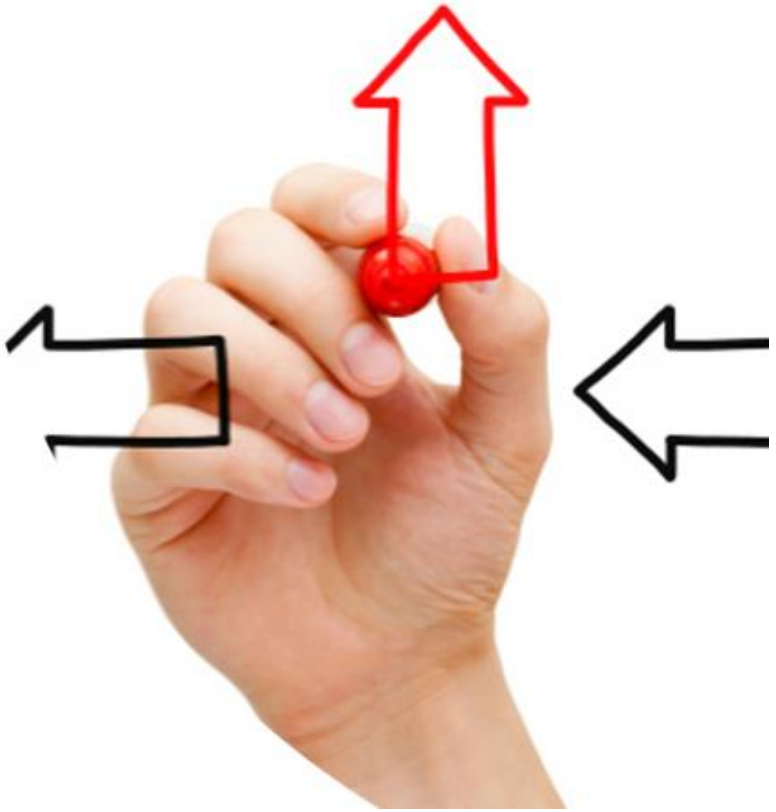
Heath Robinson brings more than 20 years of strong CPG and Food Service industry experience to AFS Technologies. Heath and his team are committed to providing excellent service to customers that have purchased AFS products and services.

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.

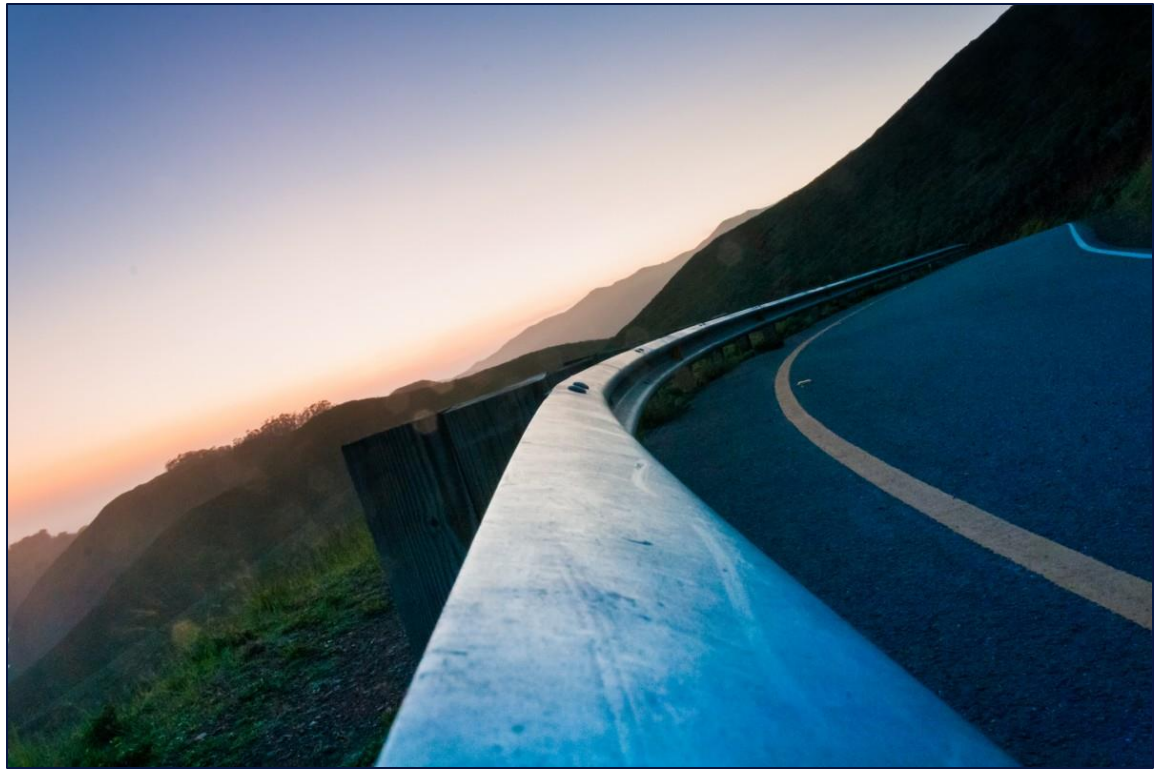
Management by Exception (MBE) is a practice where only significant deviations from a standard are brought to the attention of users.

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.

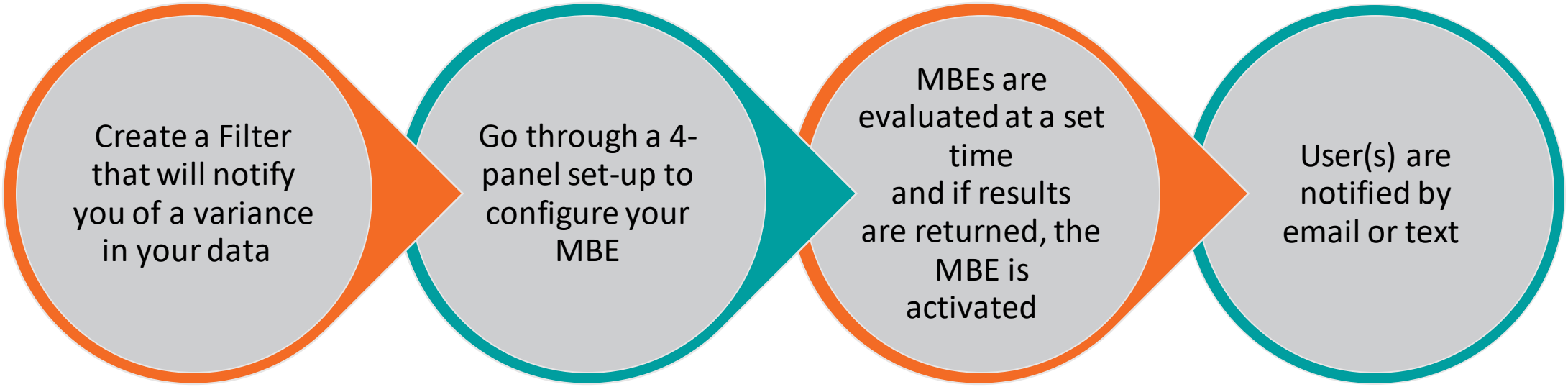
If nothing is triggered, then everything is going according to plan!

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.

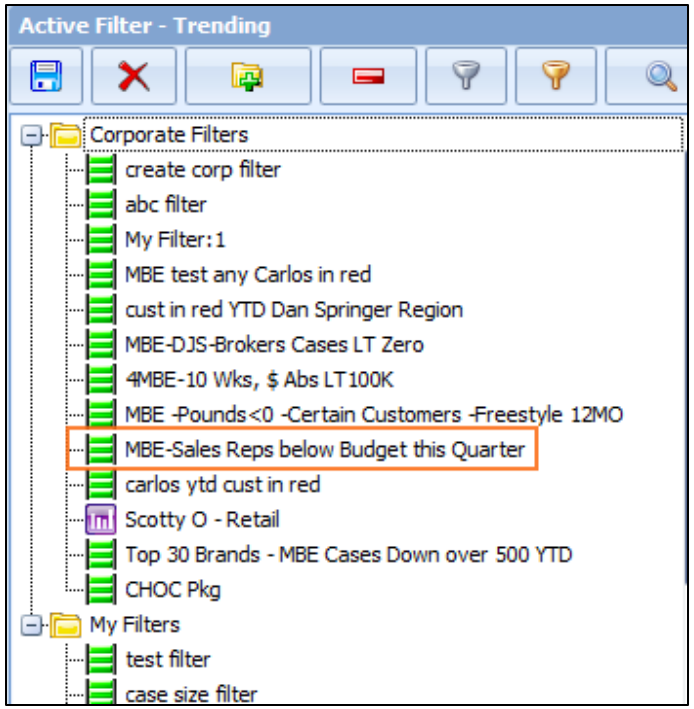


How-To Set-Up an MBE

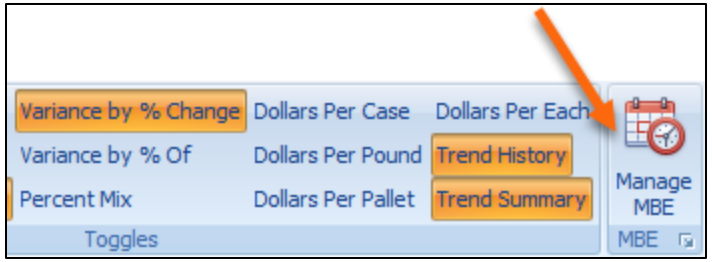


Setting up an MBE

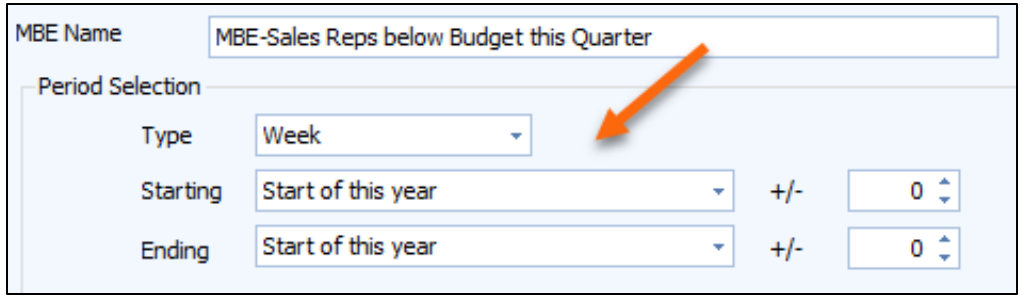
1. Create a Corporate-style filter. This will allow you to pre-filter the data to what matters to you. To define and save a Corporate filter, include a numeric column filter set to indicate when one of the measures you're interested in goes out of bounds.



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

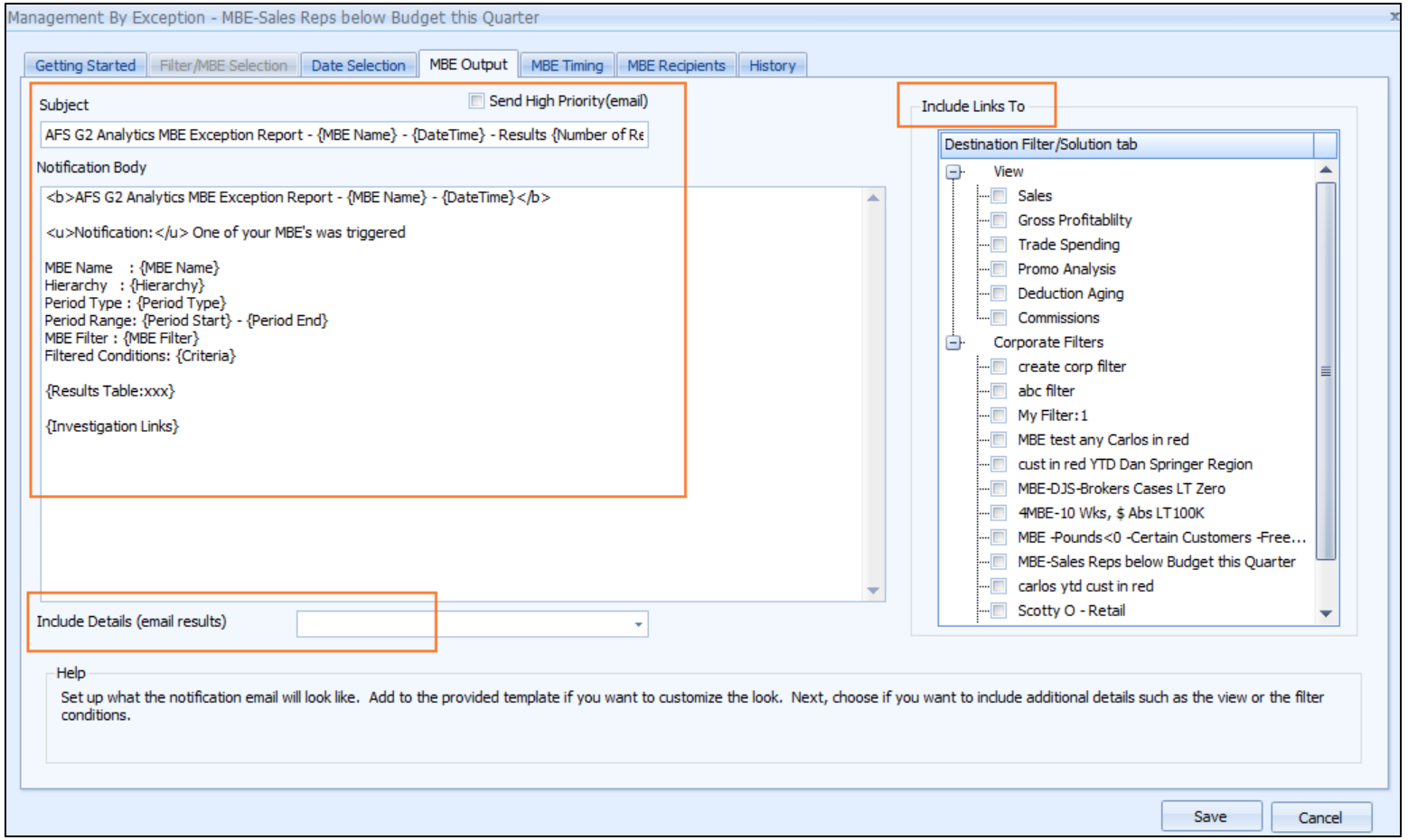


3. Choose your time frame in the Date Selection tab.



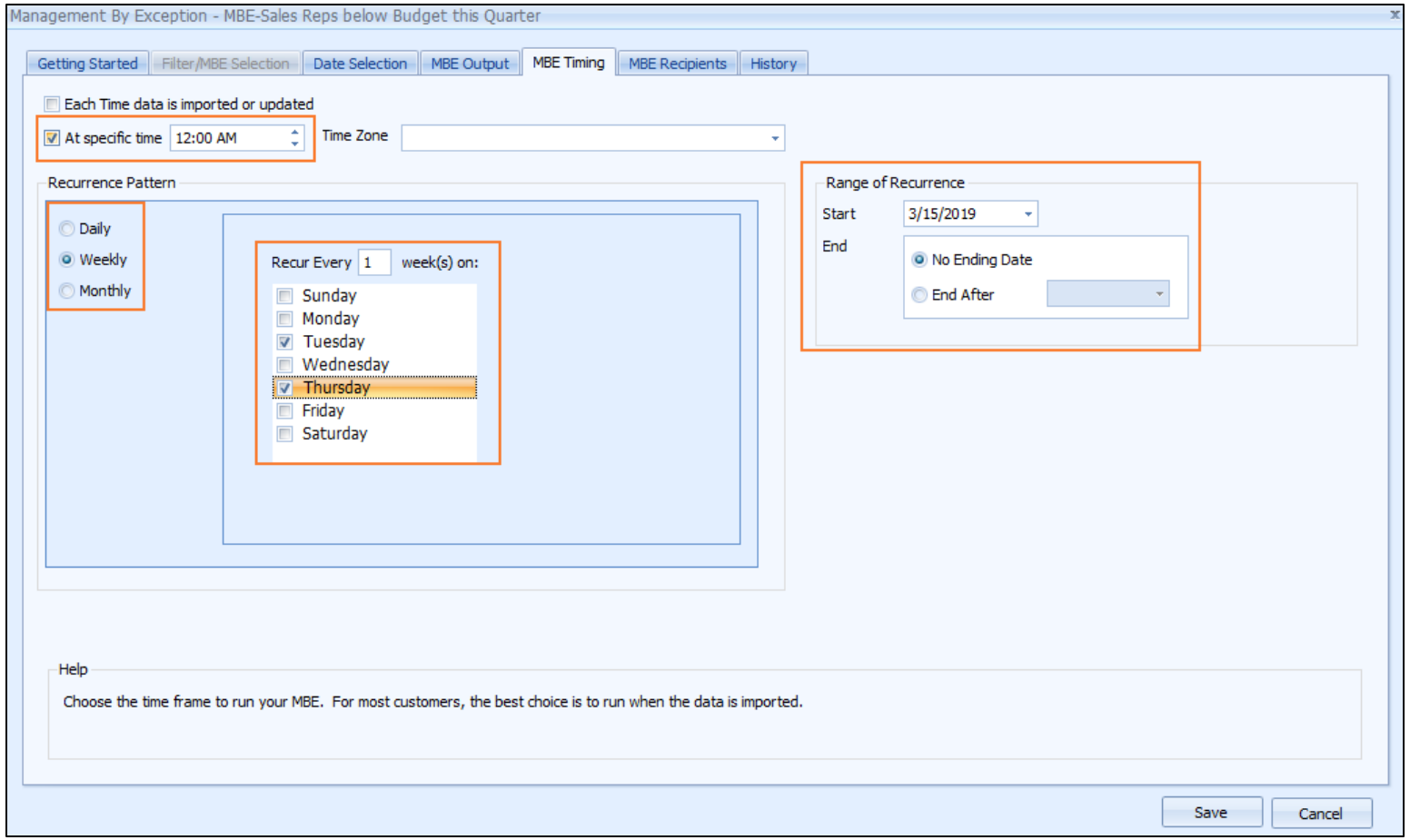
Setting up an MBE, cont.

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



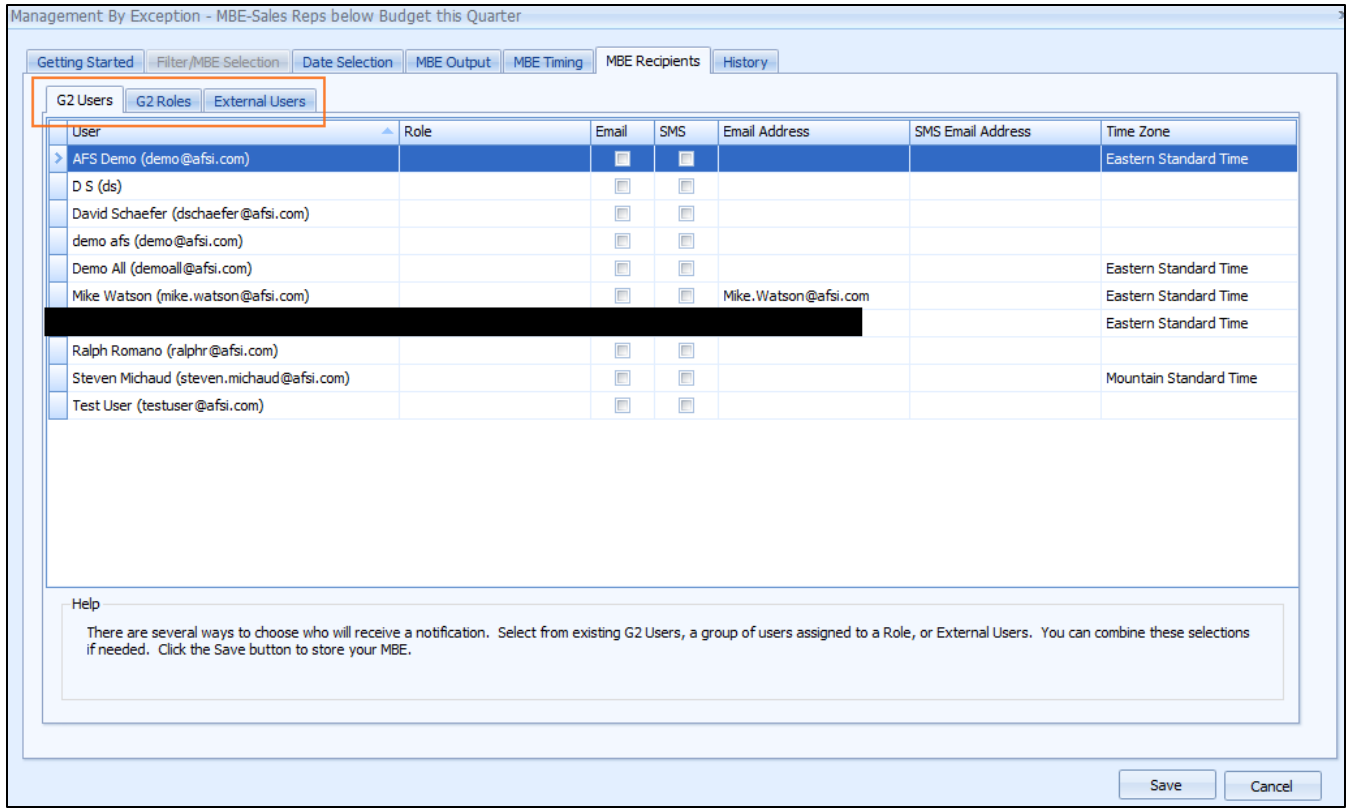
Setting up an MBE, cont.

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.

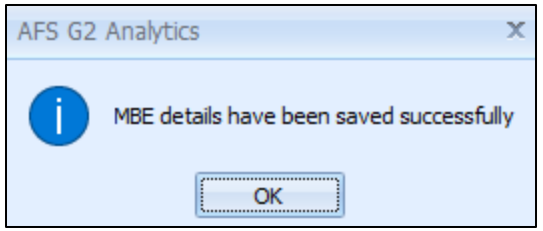


Setting up an MBE, cont.

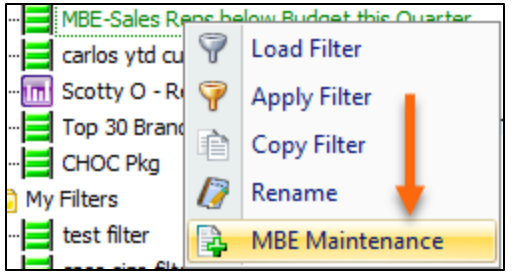
6 Choose the MBE recipients that you'd like to notify from the list of G2 users, G2 roles, or external users.



7 Save the configuration.

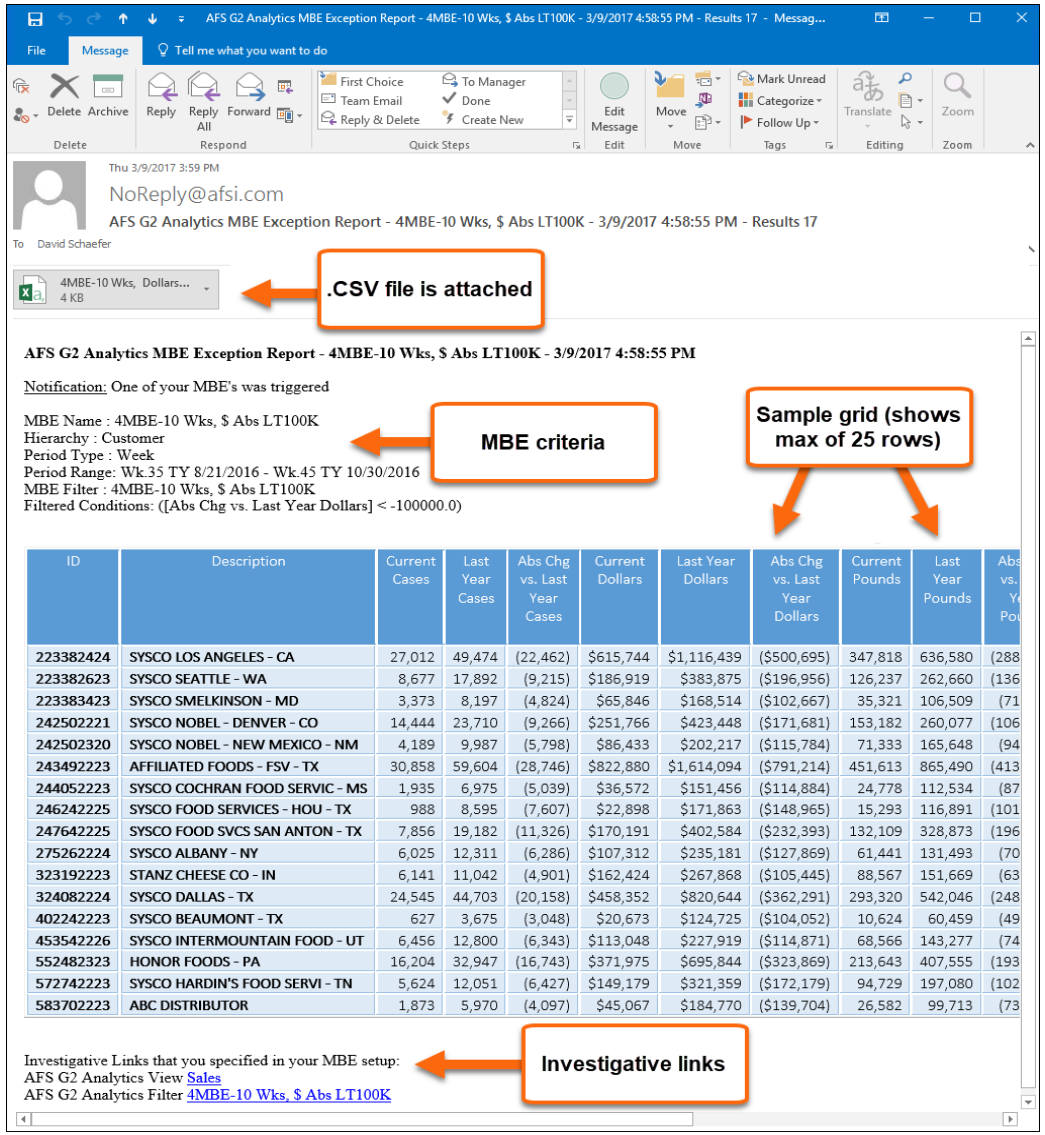


8 Once an MBE is triggered, a notification will be sent from G2 to those you've chosen to receive them. You can view your MBE history by right clicking on your Filter and selecting MBE Maintenance.



Sample MBE alerts

Email



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. Y Pou
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

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

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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

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