

SRK Prototyping Process

Prototyping in SRK is a method for proving and visualizing how you and your organization can use SRK with your own data. You will be invited by your DrivenBI Account Executive to begin the process, kicking off by a discovery session and followed up by a prototype demonstration session, with a DrivenBI Product Consultant working together with you.

Step 1: What should I bring to the discovery session?

Identify one or two sample reports that your company is using to make important business decisions. For example:

- Sales vs. Target
- Expenses vs. Budget
- Inventory Replenishment

Bring those reports to the discovery session. And it is highly desired that you also bring the owner of those reports to the session.

Step 2: What would I expect during the discovery session?

During the discovery session, DrivenBI Product Consultant will work together with you to understand your current process of creating those reports and the challenges you are facing. Our Product Consultant will also provide you with an idea of how SRK can address your challenges. Below are some typical questions we will ask during the session as well as some sample answers for your reference:

- Where does the source data come from?
 - Exported from operational systems (ERP, CRM, etc.) or SQL database in the format of CSV/XLS file
 - From a number of manually maintained spreadsheets
- What is your current process of creating those reports? What logic/calculation is applied to the source data? What is the current output of your reports and what is the output you expected? For example:
 - Every week our finance people manually consolidate this report from six other spreadsheets from three different departments.
 - We calculate our actual Sales based on ... And the formula can be found in the spreadsheet.
 - We currently get one chart on monthly revenue per department only. It would be great to combine different departments into one chart and show corresponding targets as well.

Step 3: What's next after the discovery session?

DrivenBI will schedule a live prototype demonstration session with you in about a week after the discovery session, to show you and others in your organization how your analysis works in SRK and discuss the next steps.

DrivenBI's Product Consulting team has in-depth knowledge of SRK and project experience to help you to get started.

Example of your sample sales data and reports to bring to the discovery session

A	B	C	D	E	F	G	H	I	J
1	Date	Salesperson ID	Salesperson Region	Customer No.	Item Category	Item No.	Item	Quantity	Price (Each)
2	4/1/2016	IBW206	Mark Johnson West	82964	Hand Tool	RME933W	1/2 in. Torque Wrenc	4	29.99
3	4/2/2016	HMN150	Max Franz Northwest	88055	Electric Tool	BXS938S	10 in. Table Saw	2	40.99
4	4/2/2016	IBW206	Mark Johnson West	82964	Hand Tool	RME933W	1/2 in. Torque Wrenc	3	29.99
5	4/3/2016	HMN150	Max Franz Northwest	88055	Hand Tool	RME933W	1/2 in. Torque Wrenc	4	29.99
6	4/4/2016	HMN150	Max Franz Northwest	88055	Hand Tool	TLL583H	16 oz. Fiberglass Han	5	8.5
7	4/5/2016	WEW511	Dennis Craig Northwest	55454	Hand Tool	TLL583H	16 oz. Fiberglass Han	5	8.5
8	4/5/2016	ITW505	Lisa Yang West	55348	Electric Tool	BXS938S	10 in. Table Saw	5	40.99
9	4/5/2016	MIM339	Riley Baker West	16065	Hand Tool	UPL493S	Screwdriver Set	10	8.67
10	4/7/2016	IBW206	Mark Johnson West	52964	Hand Tool	UPL493S	Screwdriver Set	5	8.67
11	4/7/2016	MIM339	Riley Baker West	16065	Electric Tool	HDN484D	1/2 in. Cordless Drill	5	50.25
12	4/8/2016	HMN150	Max Franz Northwest	88055	Electric Tool	BXS938S	10 in. Table Saw	5	40.99
13	4/9/2016	IBW206	Mark Johnson West	82964	Hand Tool	TLL583H	16 oz. Fiberglass Han	15	8.5
14	4/10/2016	WEW511	Dennis Craig Northwest	23419	Electric Tool	BXS938S	10 in. Table Saw	6	40.99
15	4/10/2016	IBW206	Mark Johnson West	52964	Electric Tool	BXS938S	10 in. Table Saw	8	40.99
16	4/11/2016	WEW511	Dennis Craig Northwest	23419	Hand Tool	UPL493S	Screwdriver Set	20	8.67
17	4/12/2016	WEW511	Dennis Craig Northwest	23419	Hand Tool	WRH482M	12 oz. Mallet	5	8.99
18	4/12/2016	ITW505	Lisa Yang West	55348	Electric Tool	HDN484D	1/2 in. Cordless Drill	5	50.25
19	4/13/2016	HMN150	Max Franz Northwest	88055	Hand Tool	UPL493S	Screwdriver Set	9	8.67
20	4/14/2016	WEW511	Dennis Craig Northwest	55454	Hand Tool	TLL583H	16 oz. Fiberglass Han	10	8.5
21	4/15/2016	WEW511	Dennis Craig Northwest	23419	Hand Tool	WRH482M	12 oz. Mallet	16	8.99
22	4/16/2016	WEW511	Dennis Craig Northwest	55454	Hand Tool	RME933W	1/2 in. Torque Wrenc	5	29.99
23	4/17/2016	HMN150	Max Franz Northwest	88055	Hand Tool	WRH482M	12 oz. Mallet	10	8.99
24	4/18/2016	IBW206	Mark Johnson West	82964	Hand Tool	UPL493S	Screwdriver Set	6	8.67
25	4/19/2016	WEW511	Dennis Craig Northwest	55454	Electric Tool	HDN484D	1/2 in. Cordless Drill	10	50.25
26	4/20/2016	MIM339	Riley Baker West	16065	Hand Tool	TLL583H	16 oz. Fiberglass Han	3	8.5
27	4/21/2016	WEW511	Dennis Craig Northwest	55454	Hand Tool	TLL583H	16 oz. Fiberglass Han	10	8.5
28	4/22/2016	ITW505	Lisa Yang West	55348	Electric Tool	HDN484D	1/2 in. Cordless Drill	8	50.25
29	4/23/2016	IBW206	Mark Johnson West	52964	Electric Tool	HDN484D	1/2 in. Cordless Drill	9	50.25
30	4/24/2016	HMN150	Max Franz Northwest	88055	Hand Tool	TLL583H	16 oz. Fiberglass Han	10	8.5

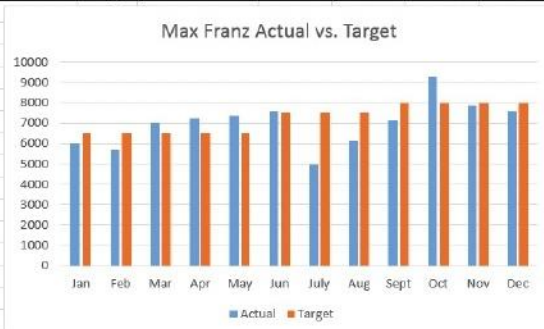
Data: Daily Actual Sales
(Exported from ERP)

A	B	C	D	
1	Month	Salesperson ID	Salesperson Name	Amount
2	1/1/2016	IBW206	Mark Johnson	4500
3	2/1/2016	IBW206	Mark Johnson	4500
4	3/1/2016	IBW206	Mark Johnson	4500
5	4/1/2016	IBW206	Mark Johnson	5000
6	5/1/2016	IBW206	Mark Johnson	5000
7	6/1/2016	IBW206	Mark Johnson	5000
8	7/1/2016	IBW206	Mark Johnson	5500
9	8/1/2016	IBW206	Mark Johnson	6000
10	9/1/2016	IBW206	Mark Johnson	6000
11	10/1/2016	IBW206	Mark Johnson	6000
12	11/1/2016	IBW206	Mark Johnson	7000
13	12/1/2016	IBW206	Mark Johnson	7000
14	1/1/2016	HMN150	Max Franz	6500
15	2/1/2016	HMN150	Max Franz	6500
16	3/1/2016	HMN150	Max Franz	6600
17	4/1/2016	HMN150	Max Franz	6600
18	5/1/2016	HMN150	Max Franz	6500
19	6/1/2016	HMN150	Max Franz	7500
20	7/1/2016	HMN150	Max Franz	7500
21	8/1/2016	HMN150	Max Franz	7500
22	9/1/2016	HMN150	Max Franz	8000
23	10/1/2016	HMN150	Max Franz	8000
24	11/1/2016	HMN150	Max Franz	8000
25	12/1/2016	HMN150	Max Franz	8000
26	1/1/2016	WEW511	Dennis Craig	4000
27	2/1/2016	WEW511	Dennis Craig	4000
28	3/1/2016	WEW511	Dennis Craig	4500
29	4/1/2016	WEW511	Dennis Craig	4500
30	5/1/2016	WEW511	Dennis Craig	5500
31	6/1/2016	WEW511	Dennis Craig	5500

Data: Monthly Target Sales
(Set at beginning of the year in Excel)

Actual vs. Target Sales 2016

Year	Salesperson	Type	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec	Total
2016	Max Franz	Actual	6000	5700	7010	7250	7380	7610	4976	6140	7150	9280	7850	7600	83946
		Target	6500	6500	6500	6500	6500	7500	7500	7500	7500	8000	8000	8000	8000
	Mark Johnson	Actual	4300	4600	4500	5100	4950	5200	6500	6600	6700	5990	6780	7210	68430
		Target	4500	4500	4500	5000	5000	5000	5500	6000	6000	6000	7000	7000	7000
	Lisa Yang	Actual	5560	6150	6050	6500	5420	5910	6420	6851	6500	6750	6830	6750	75691
		Target	5400	5400	5500	5500	5500	6000	6500	6500	6500	6500	6500	6500	72300
	Riley Baker	Actual	8100	8250	6540	6890	6450	7850	8200	8120	8880	8890	9020	9145	96335
		Target	7000	7000	7000	7000	7000	7000	7800	7800	8000	8000	8000	8000	89600
	Dennis Craig	Actual	3500	3400	4020	4510	5675	5580	6840	5910	6000	6240	6805	7200	65680
		Target	4000	4000	4500	4500	5500	5500	6000	6000	6000	6500	7000	7000	66500



Analysis: 2016 Actual vs Target Sales Analysis (Created in Excel)