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Top 10 Dashboards for Retailers to Thrive

Jeff Huckaby, Director, Global Industry Expertise, Retail and Consumer Goods

Introduction

Retailers have always worked with a sense of urgency and attention to detail. The last year taught us that agility, adaptability, thoughtfulness, and expanding digital capabilities is not only accelerated, but must become part of the core fabric of retail to survive and increase resilience.

According to McKinsey & Company, due to COVID-19, companies accelerated digital transformation by seven years. Tableau observed this with our retail customers as most staff were forced to work remotely, curbside pickup became a required option for customers, and innovative solutions were needed to protect the safety of employees and customers. It is no surprise that digital commerce exploded with an increased desire to shop online and limit face-to-face interactions. Investing in connected experiences is the new normal—a theme that carried through in recent Salesforce data following the holiday shopping season where there was 30 percent revenue growth on Black Friday and total holiday shopping ushered in a staggering $1.1 trillion with online shopping playing a key role.

Nurturing the customer journey along all touchpoints is critical. The customer funnel is now an infinite loop. The good news for retailers that have invested in and developed a thriving data culture is that they can use this information to their customer's advantage. Ensuring the loop isn't broken takes insight into customer behavior, their belief systems, their safety, product needs and availability, and establishing loyalty.

Within these core concepts, this whitepaper provides ideas, inspiration, and working examples of retail dashboards to help your organization thrive in 2021 and beyond. This year we highlight the incredible work of our partners, and for the first time, the Tableau Community and Tableau employees who are tackling common, but important retail topics with visualized data. We'll explore these top-of-mind topics as we showcase the top 10 retail dashboards.

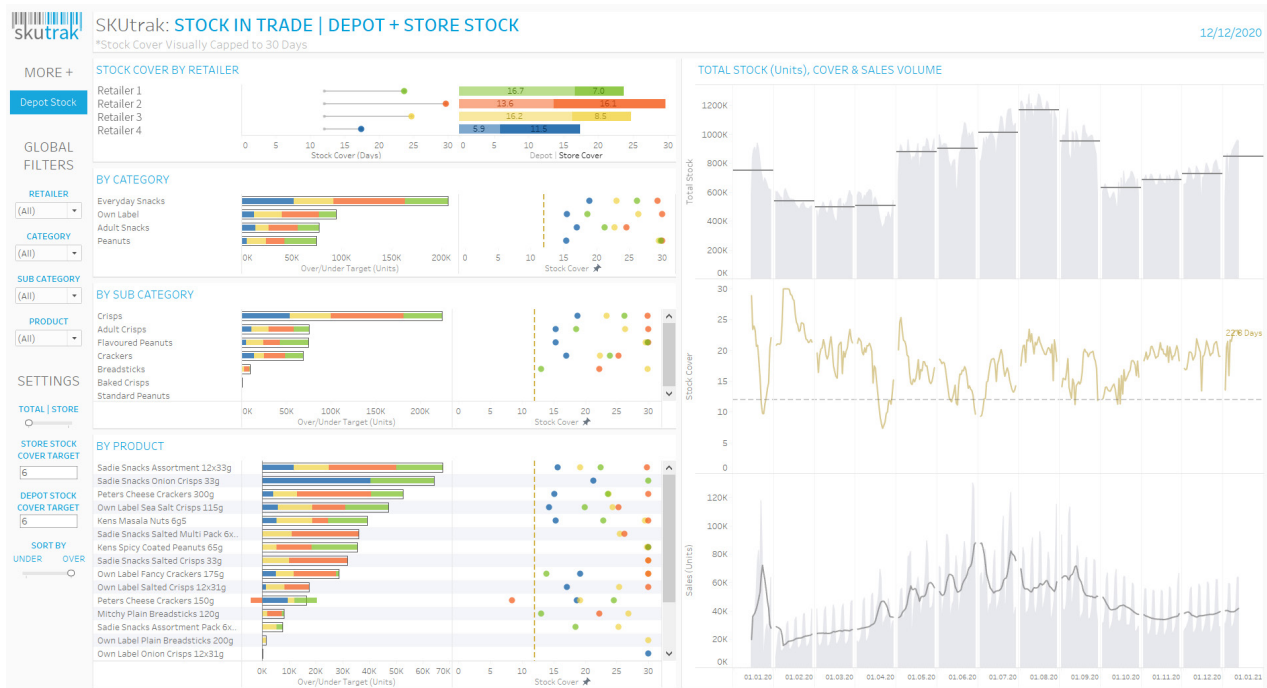# Contents

Stock in Trade dashboard
Partner: Atheon Analytics

Empty store shelves have been a common scene since March 2020, posing problems for stores and their customers. Depending on supply and demand, retailers couldn't always maintain fully-stocked shelves. Did you need toilet paper or baby formula? Those items were often scarce. These dashboards connect inventory and availability so the fast-moving consumer goods (FMCG) industry can act to eliminate out-of-stocks. It's difficult to predict what items will become the next popular commodity, but better guaranteeing availability or staying connected across the supply chain with this data can help put retailers and customers at ease.

This visual analysis from Atheon Analytics helps retailers and their suppliers easily see where inventory is under- or over-stocked by store location. Atheon's SKUtrak analytics brings together this critical information in Snowflake to effectively work from one operational canvas and act in unison. As a supplier, further examine product availability in warehouses (depots in the UK) to know where stock must be allocated, ensuring availability at certain stores. Unifying retailers, suppliers, and manufacturers around this near real-time data supports constantly-changing customer demands.

With this example, see the product data, category, or sub-category rolled up to the individual grocer. Visualized on the right-hand side of the dashboard is current demand compared with stock levels, so store or company leaders know when a location is approaching dangerously low or no inventory, and they can respond, hopefully avoiding customer dissatisfaction and decisions to shop at a competitor.

TRY IT FOR YOURSELF

Supply Chain Analysis dashboard
Partner: CoEnterprise

Many retailers struggle to gain a 360-degree overview of their supply chain and inventory levels—a struggle that was magnified dramatically with the pandemic, but also surfaces during holidays, key marketing promotions, and other occasions. Facing re-opening of local economies and businesses, the possibility of more disruption looms and retailers must understand what products are in high demand and if supply exists to match demand. If not, they'll have to look across the supply chain and activate certain measures.

Seamlessly monitor and track high-demand goods across stores and warehouses, by geography, using the Supply Chain Analysis dashboard, and in the same place see when the next shipment is due, patterns of inventory growth over time, and track on-time delivery and inventory growth key performance indicators (KPIs). From the high level inventory KPIs, quickly interact and drill down into individual product lines and understand if it's feasible to keep up with demand or if you might fall short.

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Supply Chain Optimization dashboard
Partner: Keyrus

As the supply chain is disrupted, there are cost implications that must inform the distributor's decisions. And when a distributor can't meet demand, it's important that they know how to make up for the gap with other suppliers while considering cost implications of any adjustments. This dashboard helps operations teams reduce costs by increasing supplier efficiency. It shows ordering trends that help predict demand and the impact of that forecast with supply chain alterations. Using the sliders, analysts can quickly adjust the mix between tier 1, 2, and 3 suppliers, which brings instant visibility to the cost impact of using someone new. One can ensure the proper safety stock is on-hand to meet fluctuating demand, without adding excessive inventory. The Sankey chart in the middle of the dashboard is also a great visual to see the distribution of items and map them from different suppliers to the actual products.
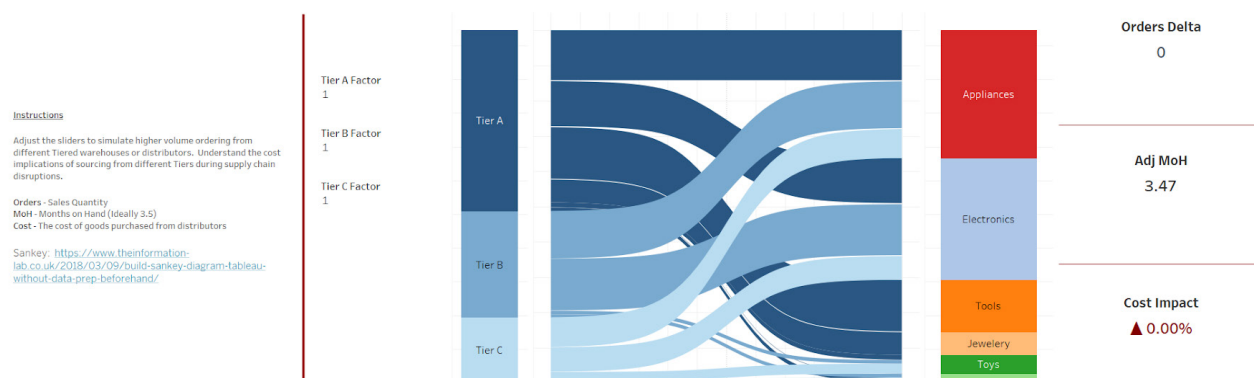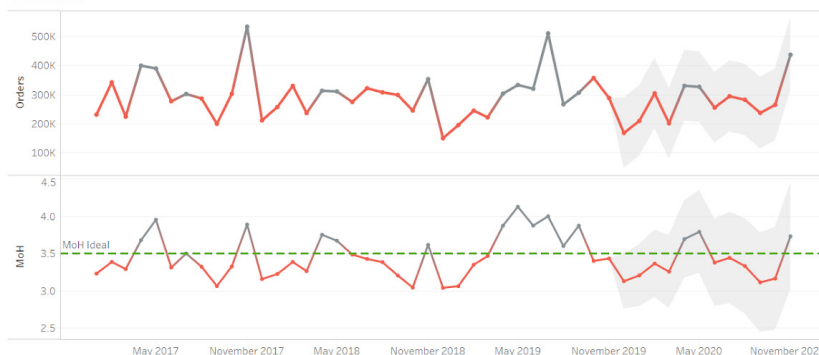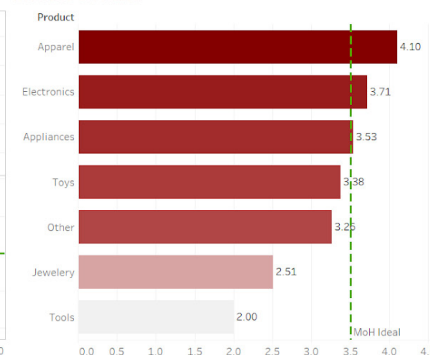

TRY IT FOR YOURSELF

Loyalty Program Analytics dashboard
## Partner: Keyrus

For retailers seeking to increase sales with loyalty member customers, it is important to understand sales activity by channel and location relative to standard customers, and trends over time, to inform marketing decisions such as price optimization and marketing promotions.

Retailers should also look more closely at the impact of past promotions on profit margin by customers because controlling razor-thin margins as retail re-opens will influence discounting decisions that also affect revenue and margins.
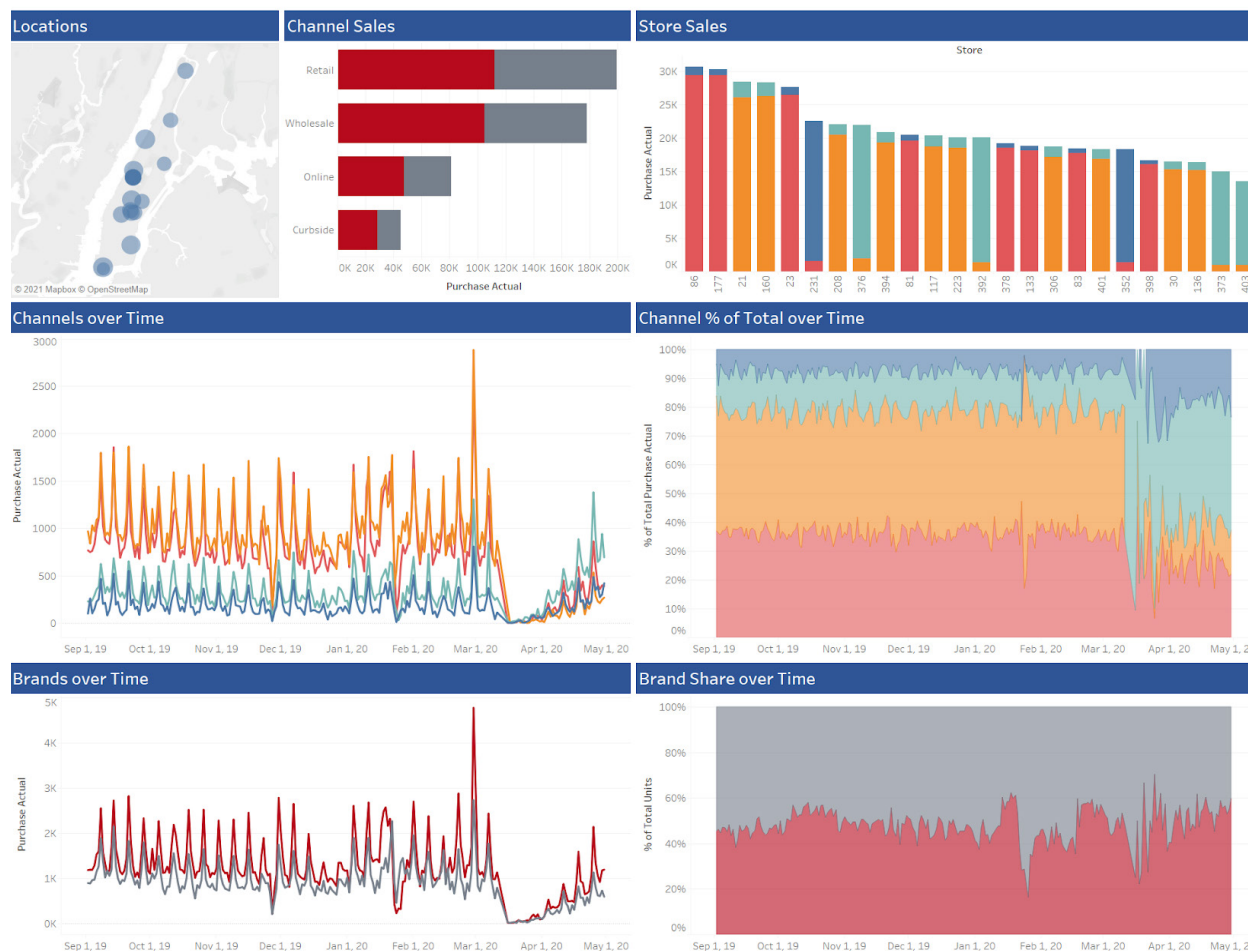
TRY IT FOR YOURSELF

Salesforce recently introduced its Loyalty Management product, giving companies a 360-degree view of all members to increase customer satisfaction and create revenue-generating loyalty programs. Learn more.

Indix Price Comp dashboard
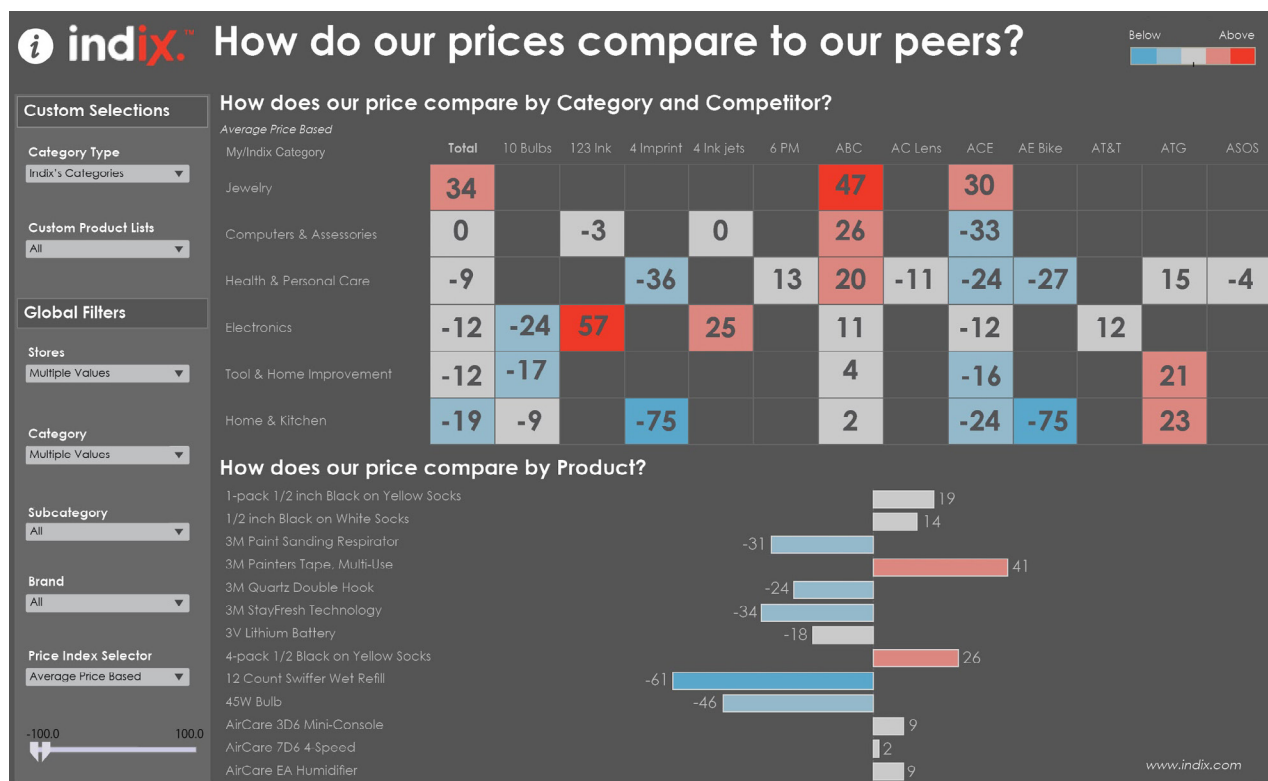## Partner: Decisive Data

Consumers benefit enormously from a market where multiple vendors sell the same item at different prices. This is increasingly true with eCommerce as more consumers choose to shop around to find the best deals. On the other hand, it creates a highly competitive landscape as vendors face the daunting task of deciding on pricing and when to offer customer savings.

In this situation, it is critical to record and track competitive prices. This dashboard helps, offering valuable market insights as vendors price their goods for competitive advantage. For many online retailers that promise a "low-price guarantee," maintaining price parity with competitors is integral to their business model and success.

On the far left side of the dashboard, filters are organized in a single column. As they are selected, two major visualizations appear on the right and change dynamically. The top visualization shows the percent variance of categories for specific competitors and you can easily see which product categories are priced too high or too low. You also see an overall percent variance for a given product category compared to all competitors.

A more granular view of specific products within each category further leverages the data. The lower right visualization itemizes products for all categories. When users select a category from above, the lower list filters to show relevant products and their price variance. Users can then identify specific products that contribute to significant category variances. In a time where analyzing big data is increasingly important, succinct and flexible pricing visuals provide quick insights for competitive advantage.

Indix Price Comp dashboard (continued)

How do our prices compare to our peers?

Below — **Above**

Custom Selections

Category Type
Indix's Categories ▼

Custom Product Lists
All ▼

Global Filters

Stores
Multiple Values ▼

Category
Multiple Values ▼

Subcategory
All ▼

Brand
All ▼

Price Index Selector
Average Price Based ▼

-100.0   100.0

How does our price compare by Category and Competitor?
Average Price Based

My/Indix Category	Total	10 Bulbs	123 Ink	4 Imprint	4 Ink jets	6 PM	ABC	AC Lens	ACE	AE Bike	AT&T	ATG	ASOS
Jewelry	34						47		30				
Computers & Assessories	0		-3		0		26		-33				
Health & Personal Care	-9			-36		13	20	-11	-24	-27		15	-4
Electronics	-12	-24	57		25		11		-12		12		
Tool & Home Improvement	-12	-17					4		-16			21	
Home & Kitchen	-19	-9		-75			2		-24	-75		23	

How does our price compare by Product?

Product	Value
1-pack 1/2 inch Black on Yellow Socks	19
1/2 inch Black on White Socks	14
3M Paint Sanding Respirator	-31
3M Painters Tape, Multi-Use	41
3M Quartz Double Hook	-24
3M StayFresh Technology	-34
3V Lithium Battery	-18
4-pack 1/2 Black on Yellow Socks	26
12 Count Swiffer Wet Refill	-61
45W Bulb	-46
AirCare 3D6 Mini-Console	9
AirCare 7D6 4 Speed	2
AirCare EA Humidifier	9

www.indix.com

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Pricing Performance dashboard

By Daniel Stasin, solution engineer, Retail and Consumer Goods, Tableau Software

The Pricing Performance dashboard isolates categories that are underperforming from both a top line revenue and product margin perspective. It highlights individual items or SKUs that fall within a user defined profitability range, and dynamically models the incremental sales associated with a price adjustment. Further context identifies the most impacted stores and enables cross-functional collaboration between Pricing and Store / Category and Region management. The dashboard has dynamic user interactions throughout, allowing a price change to be as specific and impactful as possible, especially if a retailer is utilizing localized pricing.

Daniel, a lead solution engineer for the enterprise Tableau retail team, has strong expertise in retail and visual design best practices. When he isn't helping some of the top retailers in the world, you can catch him kitesurfing.
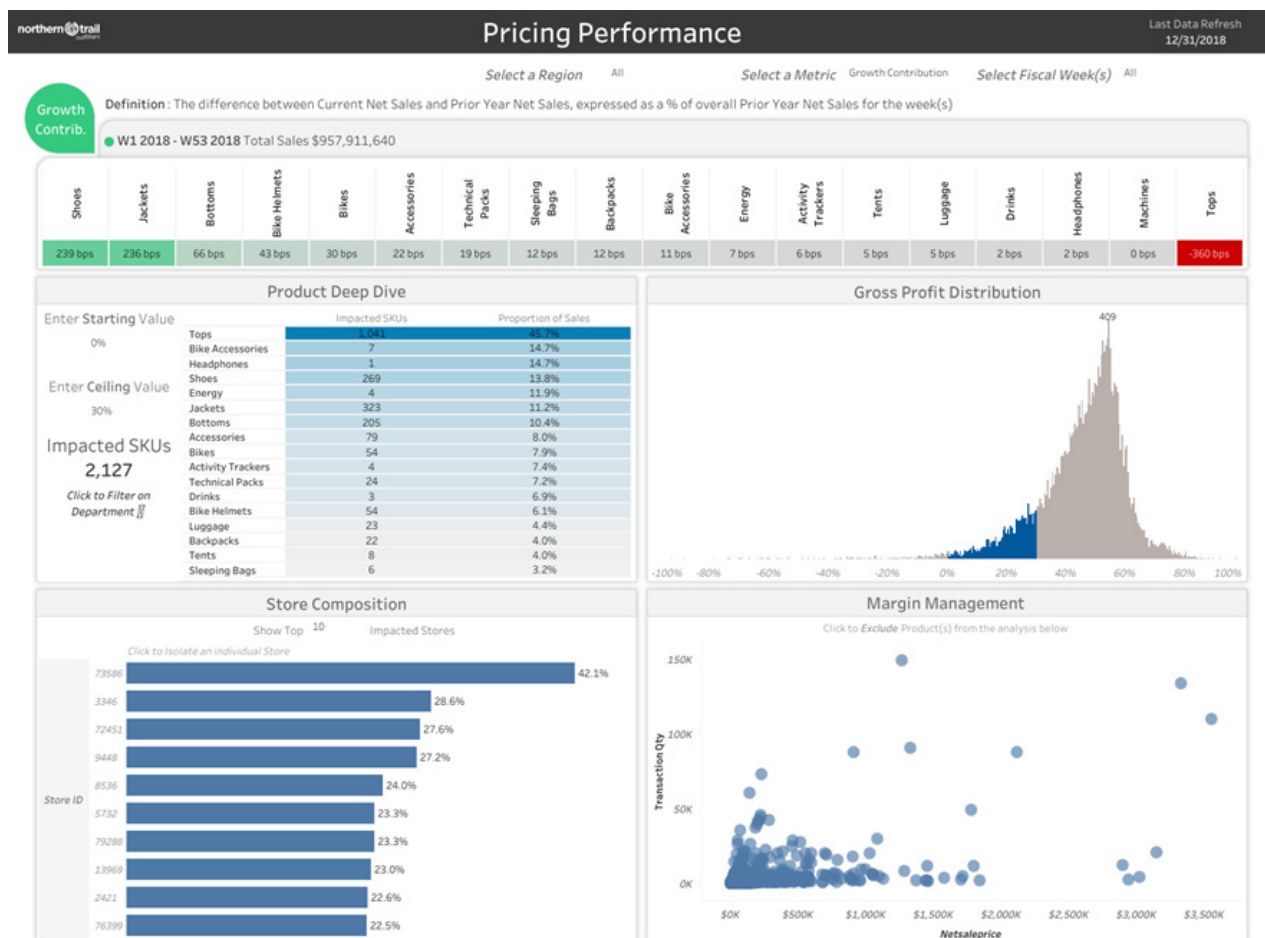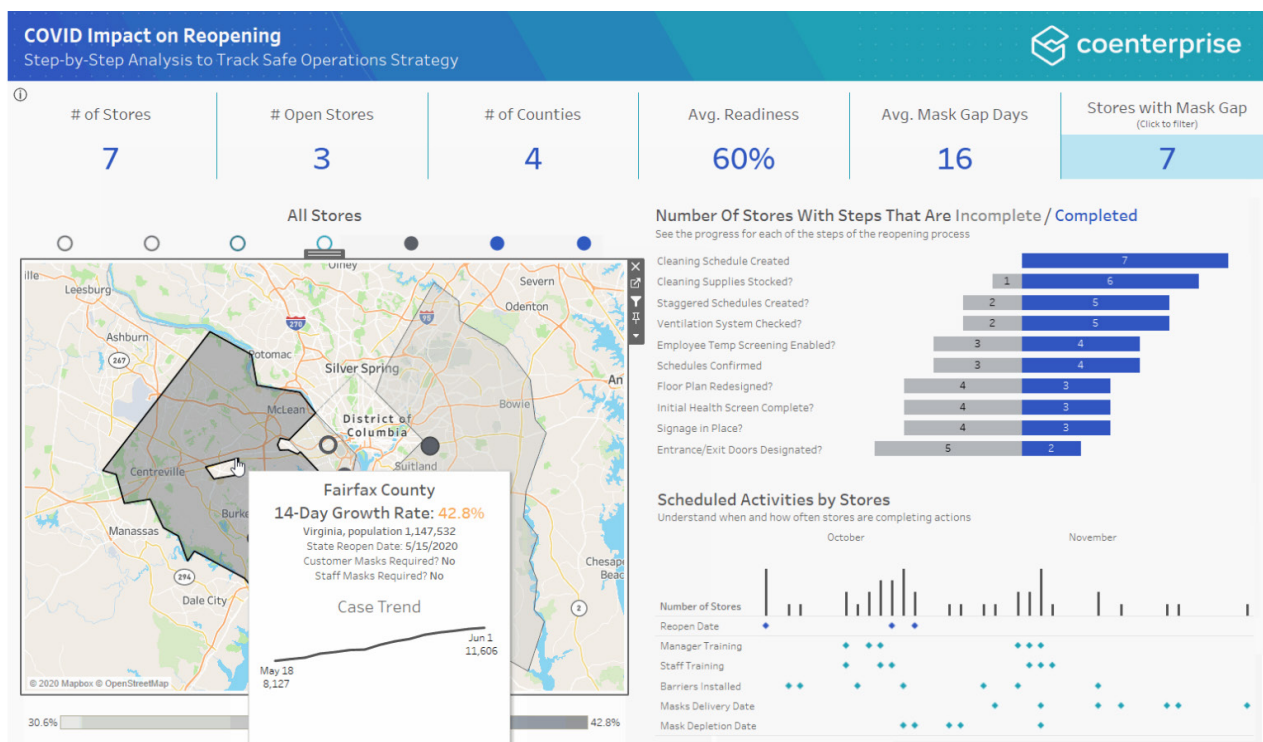

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Location Opening and Ongoing Monitoring dashboard
Partner: CoEnterprise

As COVID-19 cases climb or remain steady in some states, hyper-local information is critical to track and maintain safe operations of stores. By keeping a close pulse on local COVID-19 trends and the readiness of stores, businesses receive certain strategic advantages that include, but are not limited to: maintaining customer and employee safety, avoiding business disruption, and maximizing business profitability.

As we enter vaccination and re-opening phrases around the world, the Location Opening Monitoring dashboard, connected to Tableau's COVID-19 database and business database listing, provides greater visibility into COVID-19 cases by county, a location's readiness to open, COVID-19 supplies by location, localized COVID-19 requirements from public health officials, and activities by store.


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Customer Location and Site Selection dashboards
## Partner: Lovelytics

With lockdowns and work-from-home mandates leading to a reduction in commuting, many retailers observed major shifts in customer flow. That's why it's critical for retailers to take a fresh, on-going look at customer location data and competitors to know the changing dynamics of their local market and customer composition.

Tableau partner, Lovelytics, created a "Customer Location and Site Selection" dashboard that's powered by global location provider, Foursquare. It analyzes the Foursquare Visits data feed using geospatial analysis, offers an option to add your own customer demographics and traffic data, and enables businesses to pinpoint an optimal site for opening or where to use an existing location, which informs customer marketing and targeting.

Using spatial analysis, we can quickly evaluate the number of visitors, the amount of foot traffic, and how the flow of customers has changed. This information can easily be combined with real-time sales and loyalty data, and allow for restaurants, in this example, to use Salesforce Einstein for creating a churn analysis, predicting customers they may lose, and knowing when to activate a new retention campaign within Salesforce Marketing Cloud.
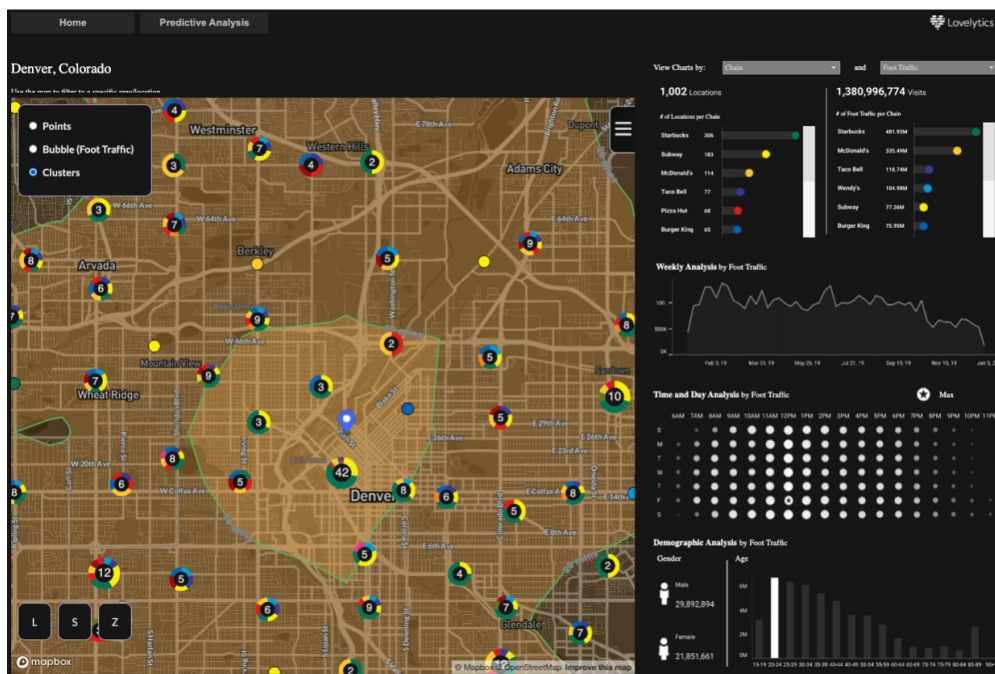
The following location view, analyzing more than one million site visits to Denver-based restaurant chains, offers the option to filter by store location, day, and hour. It can be customized for other retailers to "playback" how local activity impacts stores, and ensures new site selections won't cannibalize existing stores or that there's proper labor allocation.
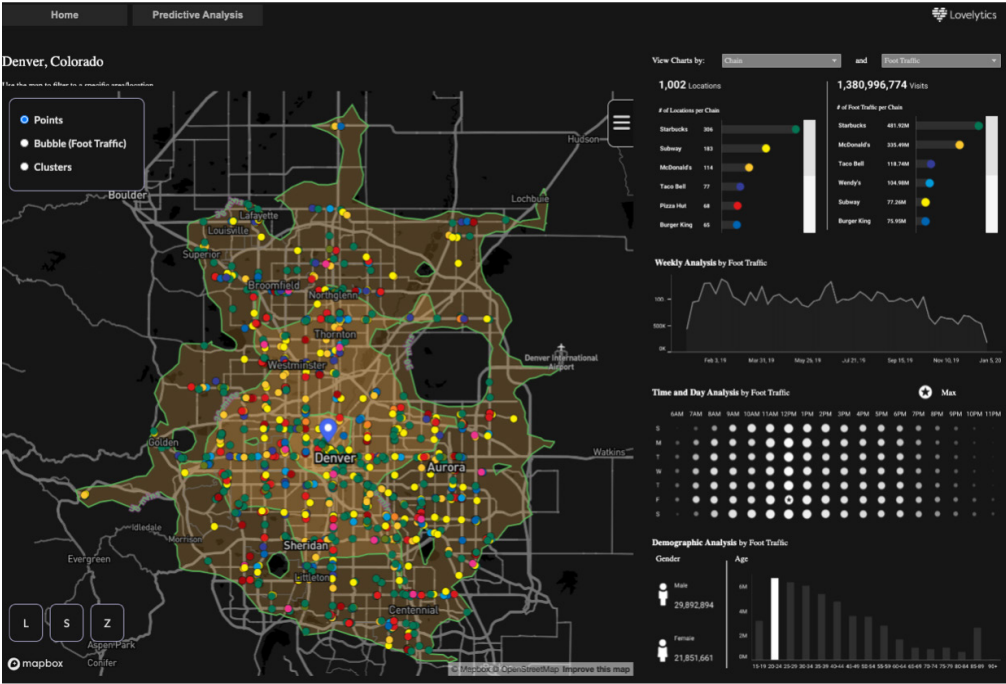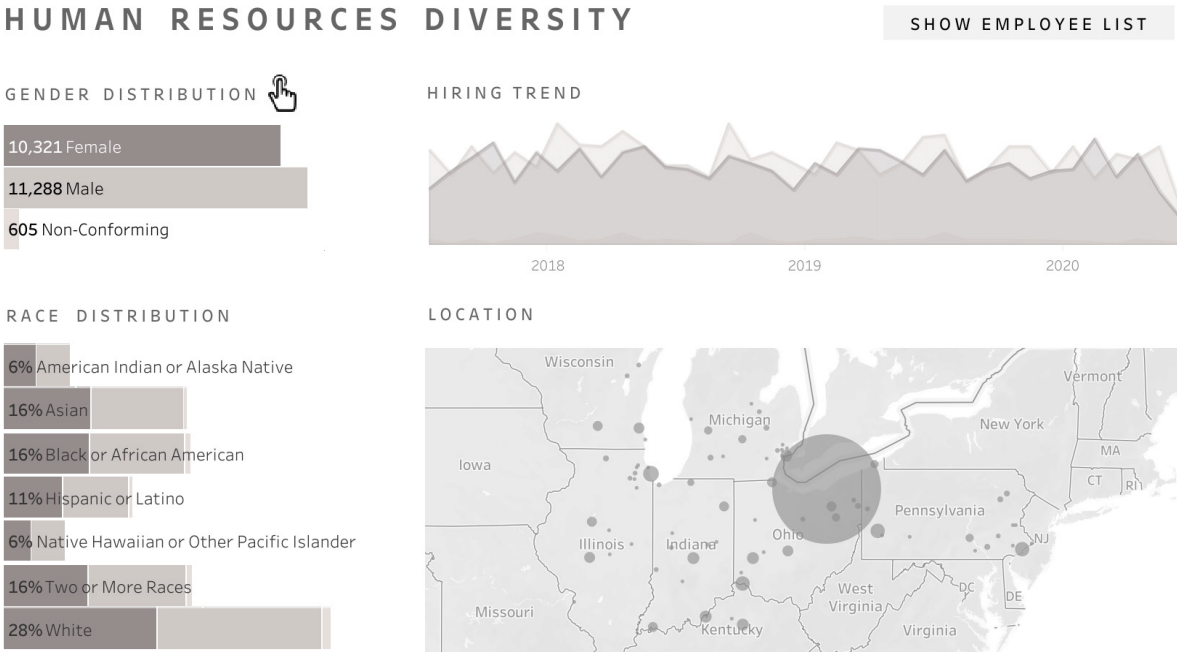

SEE FOR YOURSELF

Human Resources Diversity dashboard

By Zak Geis, Tableau Community

According to Accenture, 41 percent of shoppers shifted at least ten percent of their business away from a retailer that does not reflect the priority and importance of Inclusion and Diversity. We've also seen retailers such as Starbucks share their Inclusion and Diversity information online to ensure transparency and accountability with customers and associates.

Created by Tableau Community member, Zak Geis, as part of a global challenge hosted by "Real World Fake Data," this dashboard visualizes diversity data from human resources. Real World Fake Data (RWFD) was created by Mark Bradbourne, a lead solution engineer at Tableau Software in response to interest by the DataFam community for business-ready dashboards. Zak's dashboard was built to give the audience a simple overview of diversity metrics across locations and hiring dates and aggregates across gender and race. Selecting any data point on the page results in other charts being filtered to match the selection. If the user needs to see the underlying list of people that make up the selection criteria, they can simply click the 'Show Employee List' button.

Zak who is vice president of Software Engineering at JPMorgan Chase, leads their Tableau Center of Excellence, and is a Tableau Ambassador, is the first Tableau Community member featured in the Top 10 Retail Dashboards whitepaper. Check out his Tableau public profile for additional inspiration.
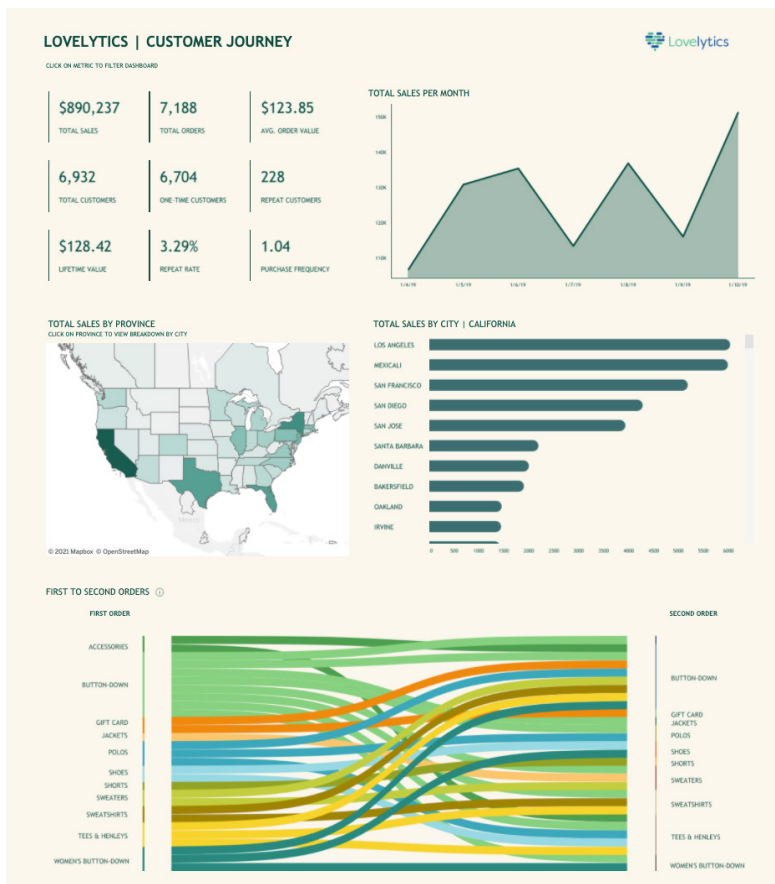

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eCommerce Customer Journey dashboard
Partner: Lovelytics

With more shopping taking place online, the 2020 holiday season grew by 50 percent with a staggering $1.1 trillion in online spend between November and December, underscoring the necessity to regularly track customer activity online and their digital buying journey. If your organization uses an eCommerce platform, then you'll be happy to know that you can quickly analyze data from ecommerce platforms such as Salesforce Commerce Cloud in Tableau. By understanding customers' buying habits, retailers can unify merchandising, marketing, and fulfillment operations. And being able to predict future purchases, styles, sizes, and colors guarantees the right inventory is available to fulfill customers' online orders.

Lovelytics created the eCommerce customer journey dashboard to quickly see eCommerce KPIs, with the added ability to interact and learn where key customer activity is performed and which products are popular. This has led to senior managers at retailers such as Untuckit to measure performance to help inform their strategy.

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Retail benefits of analyzing inventory, customer behavior, and diversity

Demystifying inventory availability and ensuring alignment of retailers, suppliers, and warehouses (or depots) puts the right amount of inventory in the right stores to match customer demands, preferences, and traffic.

Building high-performing retail teams that develop strategy and achieve the agility and level of execution needed to thrive must include diversity of race, gender, and age as the core backbone of that performance strategy.

As we return to some normalcy across local communities and with retailers, data and analytics, including these top 10 dashboards, can provide critical insights, increased clarity, and highlight new opportunities so retailers can remain relevant and valued by customers.

Join the discussion with more than 4,100 retail and consumer goods customers to learn more about retail analytics, ask questions, provide help, and be inspired.

About the partners

We want to thank our incredibles partners for their participation. To learn more about the above examples to help you thrive, please reach out to the partners below:

Dashboard	Partner	Contact Link
Stock in Trade	Atheon Analytics	atheonanalytics.com/lets-chat
Location Opening and Ongoing Monitoring; Supply Chain Analysis	CoEnterprise	coenterprise.com/contact/
Indix Price Comp	Decisive Data	decisivedata.com/contact
Supply Chain Optimization; Loyalty Program	Keyrus	keyrus.com/en/contact-us/
Customer Location and Site Selection; eCommerce Customer Journey	Lovelytics	lovelytics.com

About Tableau

Tableau helps people transform data into actionable insights that make an impact. Easily connect to data stored anywhere, in any format. Quickly perform ad hoc analyses that reveal hidden opportunities. Drag and drop to create interactive dashboards with advanced visual analytics. Then share across your organization and empower teammates to explore their perspective on data. From global retailers to small mom and pop stores, people everywhere use Tableau's analytics platform to see and understand their data.

Additional resources

· View a recent NRF presentation from Rajesh Naidu, vice president of Architecture, Data & Analytics Technology at Starbucks and Andrew Beers, Chief Technology Officer at Tableau, about how Starbucks is enhancing organizational adaptability, innovation, and impact through analytics, plus what most excites and concerns them for the future of analytics.

· Check out Tableau's 2019 and 2018 round-ups of the top retail dashboards.

· Visit our Retail solutions page to see how Tableau can set you up for success now and in the future, extracting the most value from data.

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