

TurfView BI User Guide for Distributors

Castrol TurfView BI. Unlocking Data.

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TurfView BI

Launched in 2001

Now used by over
>1000 distributors in
>70 countries

Overview

Unlocks data to monitor and
evaluate diverse commercial
opportunities

Purpose

A business intelligence platform
connecting Castrol and its
Distributors

This document introduces the
principal attributes of the platform

Navigation

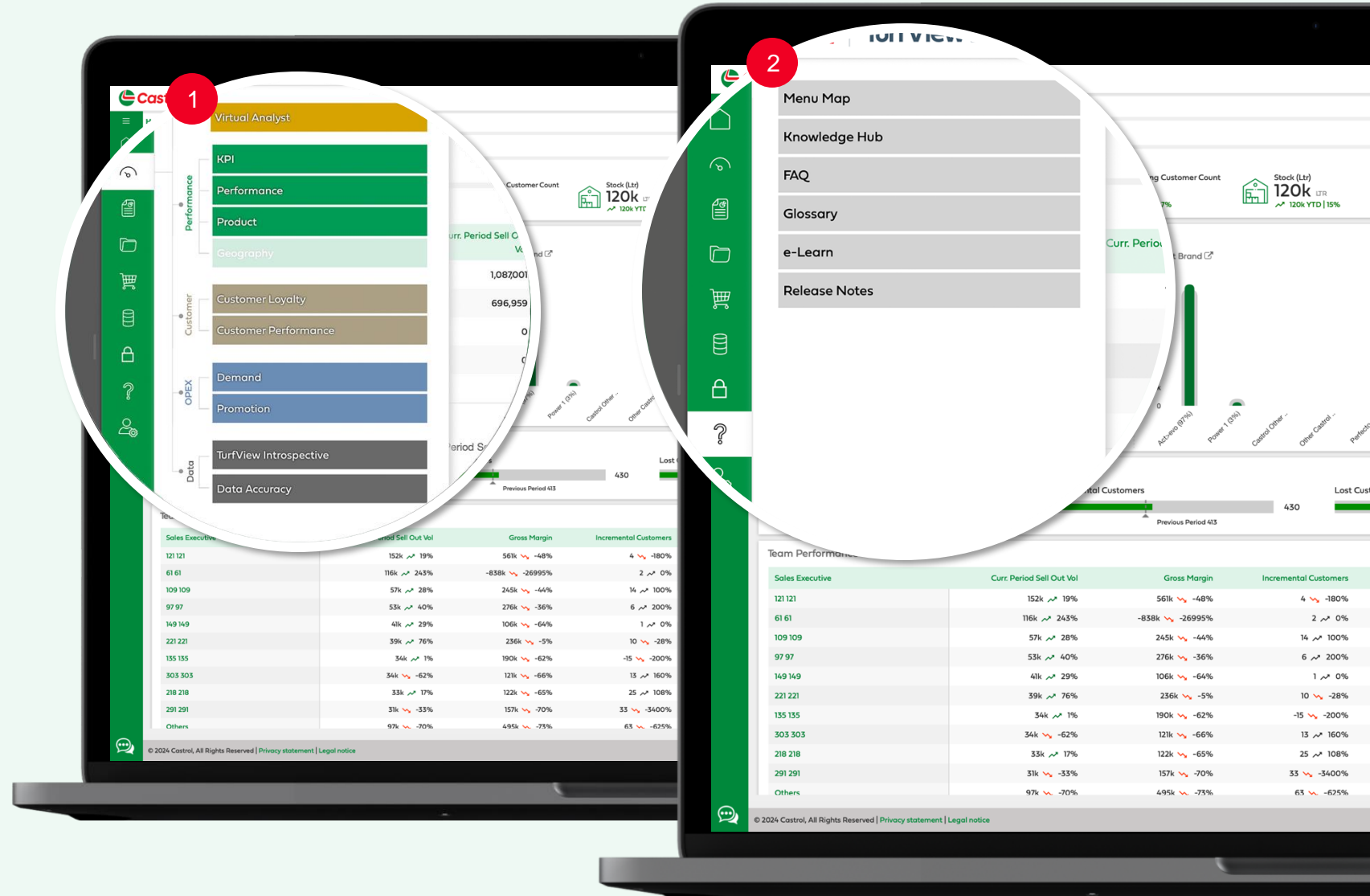
Main Menu

Overview

The two most important Main Menu items are:

1 Dashboards Menu

2 Help Menu



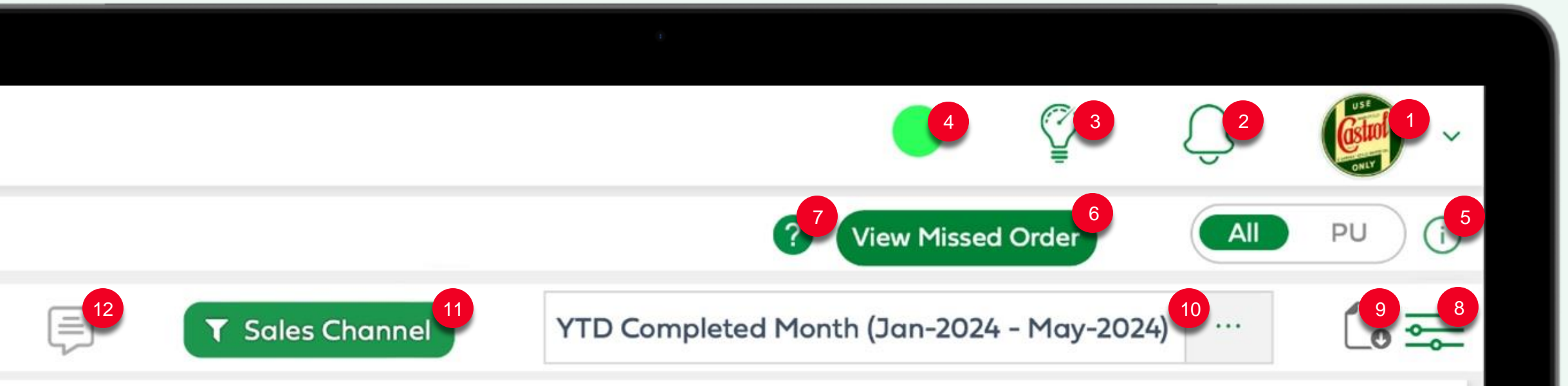
Navigation

Prompts & Guides

Overview

These Prompts + Guides will help the user manage their TurfView BI account.

1. Your Account – the user's profile
2. Your Notifications - what the user is watching, including recent updates
3. Your Insights - such as, missed orders
4. Process Monitor – Tracks data processes to ensure the view is up to date
5. Information Button - brief Dashboard description
6. View Missed Order - predicted orders which have not yet arrived (only available in the Performance Dashboard)
7. Question Mark - offers help with this page
8. Advanced Filters - adjustments to principal data variables
9. Export to Excel - requests for an Excel download
10. Time Periods - changes to current and comparative time periods
11. Sales Channel - variations to segmentation
12. Data Accuracy - important comments on data made by the business



Dashboards

This part of the User Guide
focuses on five Dashboards

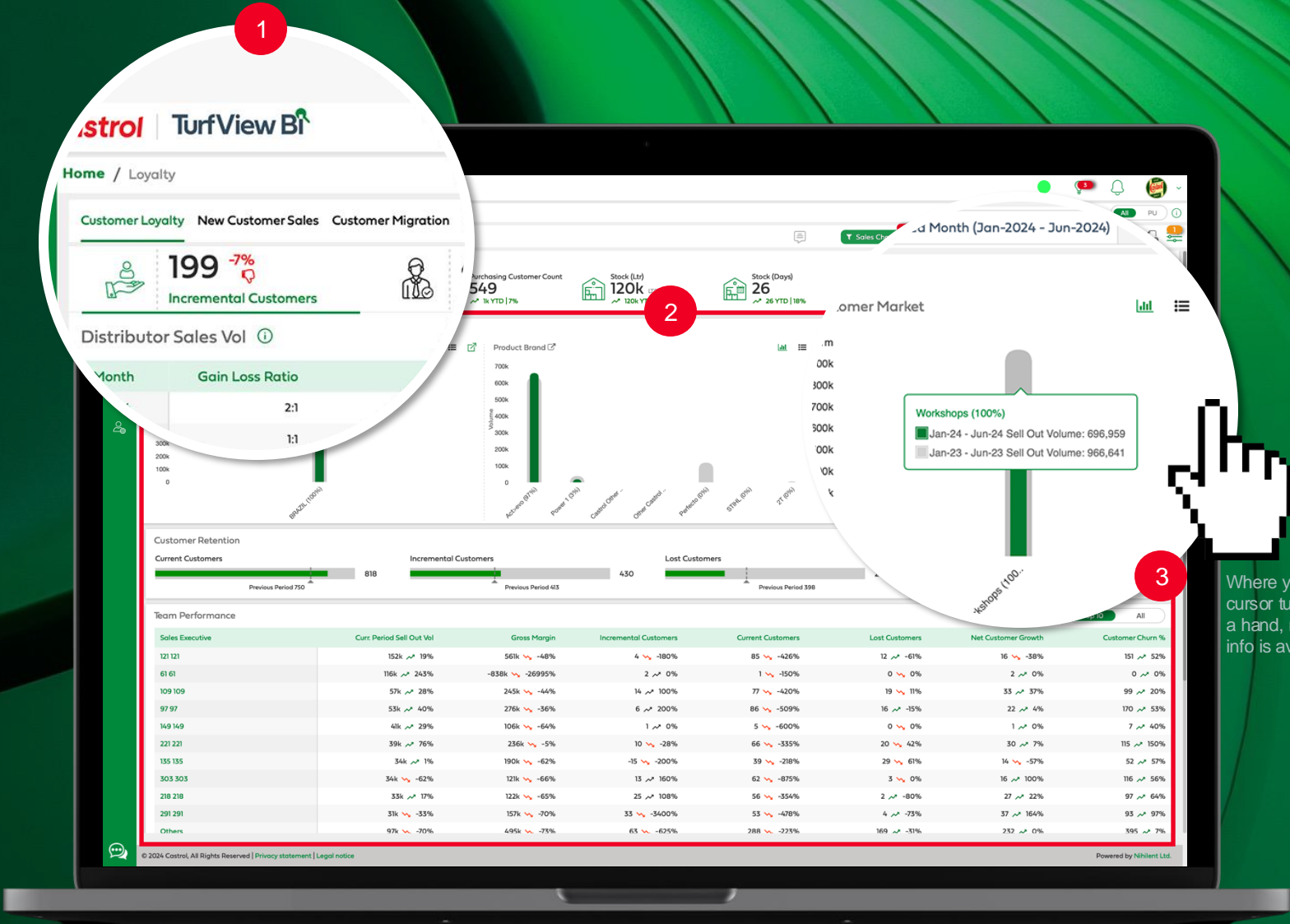
Dashboards

Overview

- 1
- Each Dashboard has two or more Sections or Tabs
- 2
- Each Section or Tab has several Charts, Tables or Graphs
- 3
- Most Charts, Tables and Graphs have a 'click-to-drill-down' feature, or they can show additional data via a pop-up

Principal Data Definitions

| | |
|-------------|--|
| Purchases | TurfView BI calls a Distributor's purchases 'Sell-in' |
| Sales | TurfView BI calls sales to a Distributor's customer 'Sell-out' |
| Stock | a Distributor's stock or Inventory is measured by volume (Litres or Gallons) |
| Customers | these are a Distributor's customers, segmented by buying behaviour patterns |
| Salespeople | TurfView BI calls a Distributor's salespeople DSRs |



KPI Dashboard

Overview

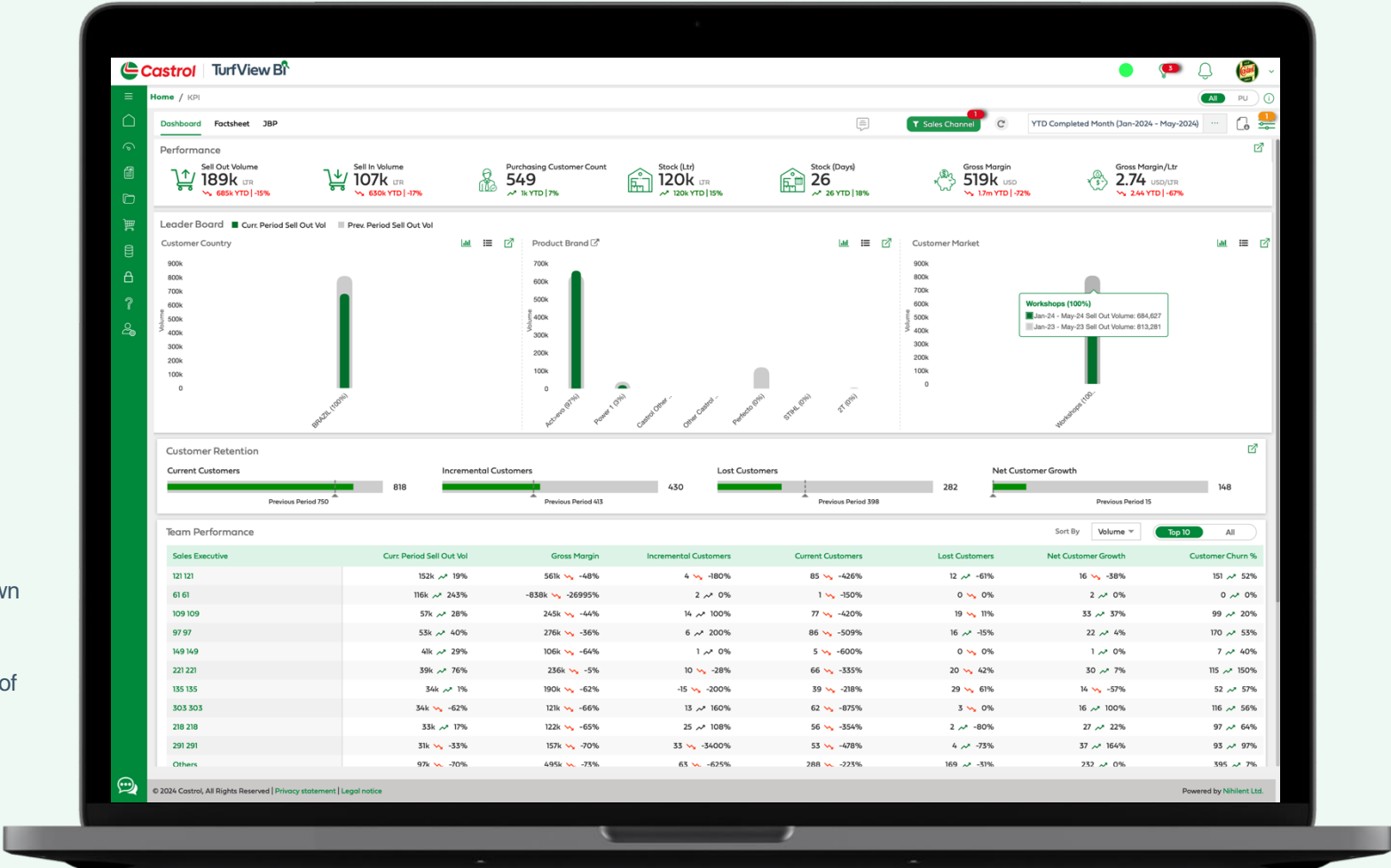
This Dashboard gives a compact summary of the raw data and key performance indicators for the Distributor's business with Castrol.

Purpose

It can be difficult to find reliable datapoints which consistently capture the overall health of a distribution business.

This is because it's not unusual to find internal and external data drawn from different sources and collected for different purposes.

The KPI Dashboard gives a high-level overview of all critical aspects of the Distributor's business, unifying Distributor data and Castrol data.



KPI Dashboard

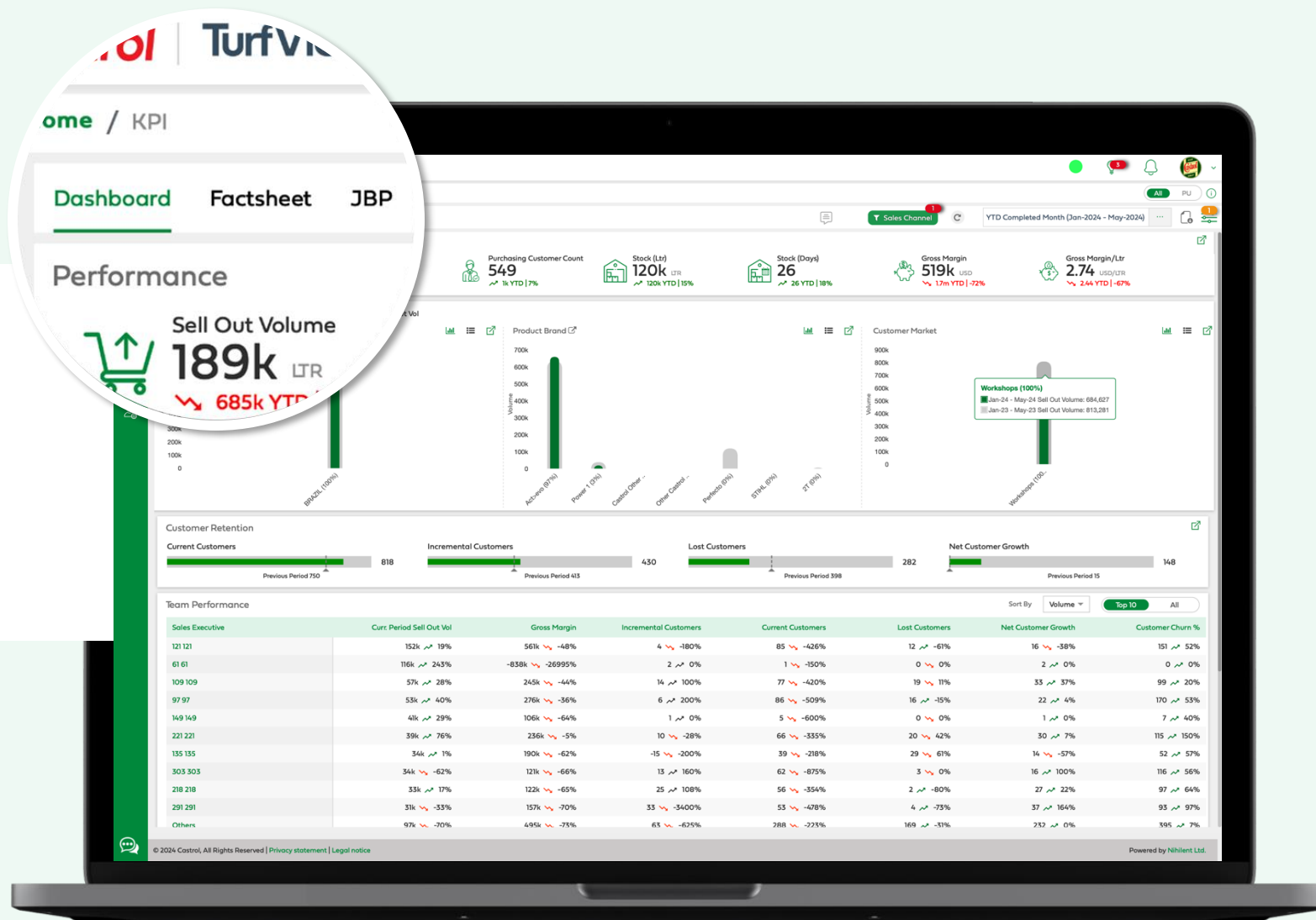
Sections

The KPI dashboard consist of three sections:

Dashboard: This is a summary of the fundamental measures of a Distributor's performance with Castrol products.

Factsheet: This gives the input data and the core calculations used to create the charts in the first section of this Dashboard.

JBP: This is a record of the sales targets from a Distributor's current Joint Business Plan with Castrol.

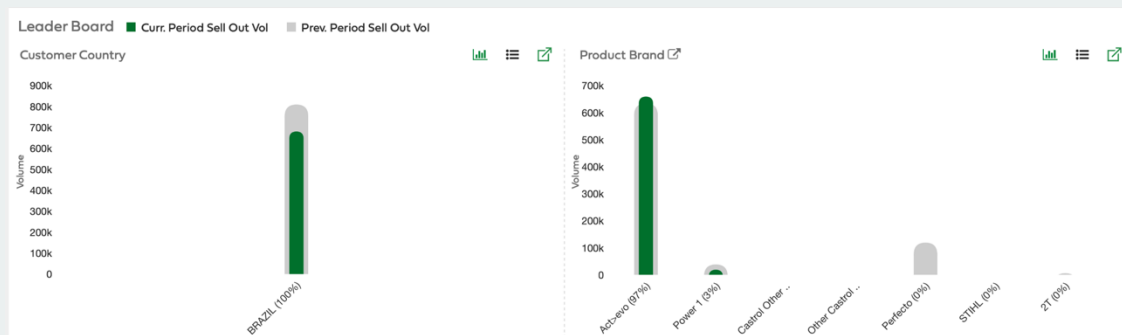


KPI Dashboard



Below you will find a zoomed view and additional details on these sections

1 Leader Board



The is a gauge of your sales across your product portfolio and target market segments

- It is possible to drill down through all product families and all market segments
- This data will help identify a Distributor's leading and lagging products and markets

2 Customer Retention



These charts record changes to the current number of a Distributor's active Castrol customers

- It shows movements in existing customers, new customers, and lost customers
- Together, they show net customer growth within a Distributor's chosen time frame

KPI Dashboard

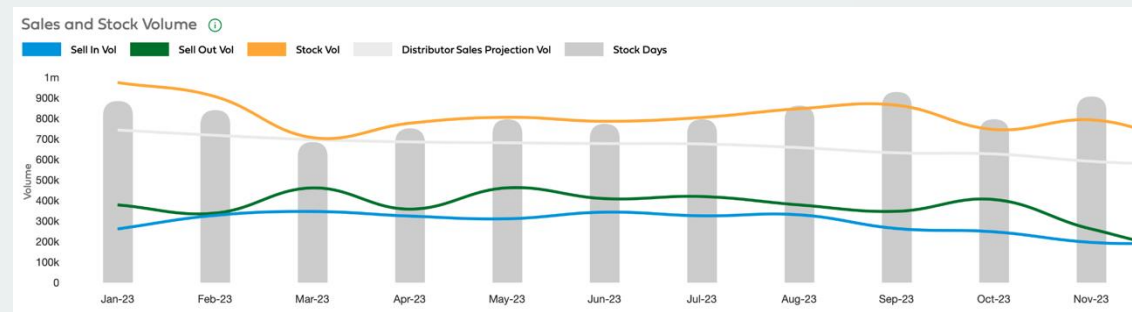
3 Team Performance

| Team Performance | | | | | |
|------------------|---------------------------|-----------------|-----------------------|-------------------|----------------|
| Sales Executive | Curr. Period Sell Out Vol | Gross Margin | Incremental Customers | Current Customers | Lost Customers |
| 121 121 | 152k ↗ 19% | 561k ↘ -48% | 4 ↘ -180% | 85 ↘ -426% | 12 ↗ -6% |
| 61 61 | 116k ↗ 243% | -838k ↘ -26995% | 2 ↗ 0% | 1 ↘ -150% | 0 ↘ 0% |
| 109 109 | 57k ↗ 28% | 245k ↘ -44% | 14 ↗ 100% | 77 ↘ -420% | 19 ↘ -1% |
| 97 97 | 53k ↗ 40% | 276k ↘ -36% | 6 ↗ 200% | 86 ↘ -509% | 16 ↗ -1% |
| 149 149 | 41k ↗ 29% | 106k ↘ -64% | 1 ↗ 0% | 5 ↘ -600% | 0 ↘ 0% |
| 221 221 | 39k ↗ 76% | 236k ↘ -5% | 10 ↘ -28% | 66 ↘ -335% | 20 ↘ 4% |
| 135 135 | 34k ↗ 1% | 190k ↘ -62% | -15 ↘ -200% | 39 ↘ -218% | 29 ↘ 6% |
| 303 303 | 34k ↘ -62% | 121k ↘ -66% | 13 ↗ 160% | 62 ↘ -875% | 3 ↘ 0% |
| 218 218 | 33k ↗ 17% | 122k ↘ -65% | 25 ↗ 108% | 56 ↘ -354% | 2 ↗ -8% |
| 291 291 | 31k ↘ -33% | 157k ↘ -70% | 33 ↘ -3400% | 53 ↘ -478% | 4 ↗ -7% |

These tables provide a summary of the business impact of each individual salesperson

- They show us each salesperson's sales, margins, and customer count
- This provides a Salesperson Leaderboard

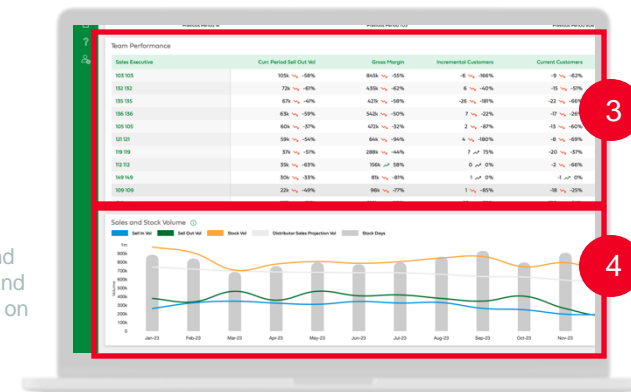
4 Sales and Stock Volume



This shows the relationship between customer demand and your stock holding

- This tracks current and recent purchases, sales, stock volume, and stock days
- When combined with a sales projection, this can match stock with forecast demand

Below you will find a zoomed view and additional details on these sections



Performance Dashboard

Overview

This Dashboard provides a comparative analysis of a Distributor's past sales performance with data which can inform future sales activities.

Purpose

Some of the most valuable insights which can impact of the future of a distribution business are built on customer data and sales data.

This is because targets and budgets always begin with the top line – the sales forecast.

By integrating data sources from across the business, TurfView BI can determine how best to target incremental revenue opportunities across different customer segments.



Performance Dashboard

Sections

The Performance dashboard consist of four sections:

Performance: This is a summary of a Distributor's sales performance by salesperson, customer, product and geography.

Monthly Performance: These charts contrast a Distributor's buying and selling volumes of Castrol's principal product brands.

Sales Comparison: This provides a drill-down facility to evaluate sales performance by geography, market, and product.

R&O (Retention & Optimisation): This plots customer behaviour by their order frequency and the variety of products they buy.



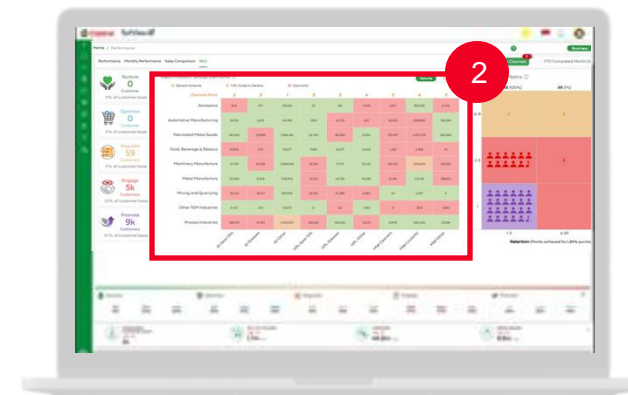
Below you will find a zoomed view and additional details on these sections

Performance Dashboard

R&O



> Automotive



> Industrial

1 R&O Customer Matrix: Automotive

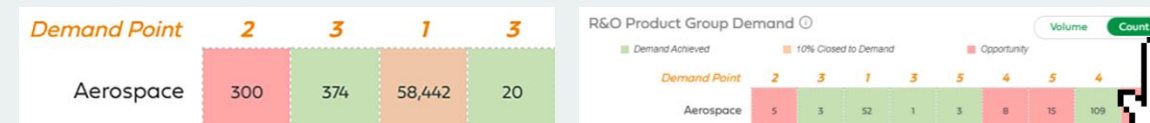
This matrix maps two variables for each customer – the mix of products they buy, and the frequency of their orders.

- Those customers in the bottom left box have the weakest position, and those in the top right box have the strongest position.
- The matrix separates customers into five categories, each of which implies a different sales objective – expanding their product mix and/or increasing their order frequency.



2 R&O Customer Matrix: Industrial

This chart shows aggregate clusters of a Distributor's customers based on their segment (in this example 'Aerospace') and on their purchases.



- When a cell is **green**, it shows that customers are buying the recommended volume for their segment.
- When a cell is **amber**, the volume is <10% below expectations; and when **red**, the volume is >10% below the expected volume.
- It is also possible to toggle from volume to customer count. Customers in a red cell are considered a cross-selling opportunity.

Product Dashboard

Overview

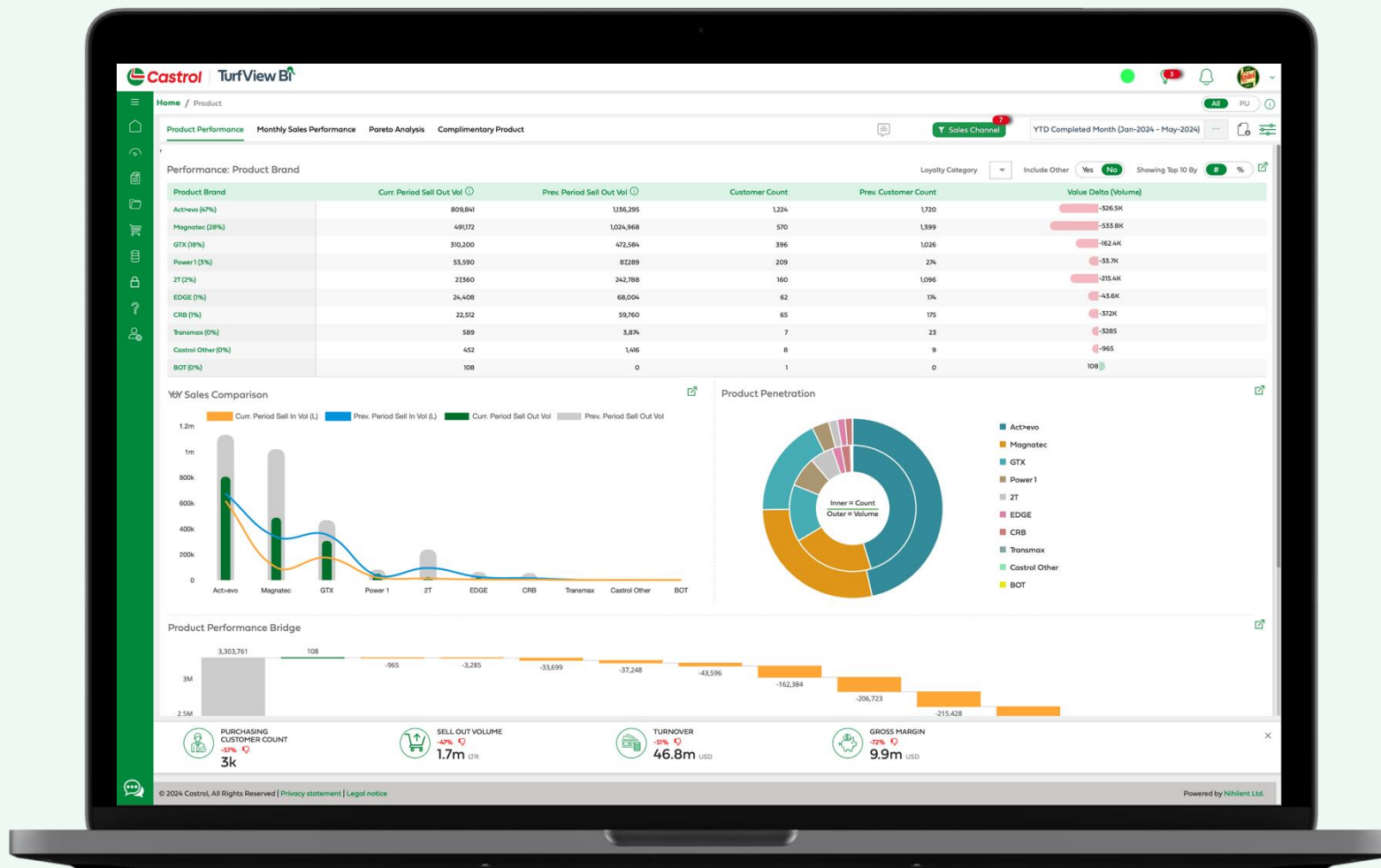
This Dashboard looks at sales trends based on Castrol's product types and hierarchy.

Purpose

When a distributor's warehouse holds a broad range of product variants and pack sizes, it's important to be able to predict how product preferences might evolve.

This is because the dynamics of product preferences can reveal the opportunities for incremental sales either via organic growth, cross-sales, or trade-up.

TurfView BI can help a Distributor track the subtle changes in the performance of the full portfolio of their inventory holdings of Castrol products.



Product Dashboard

Sections

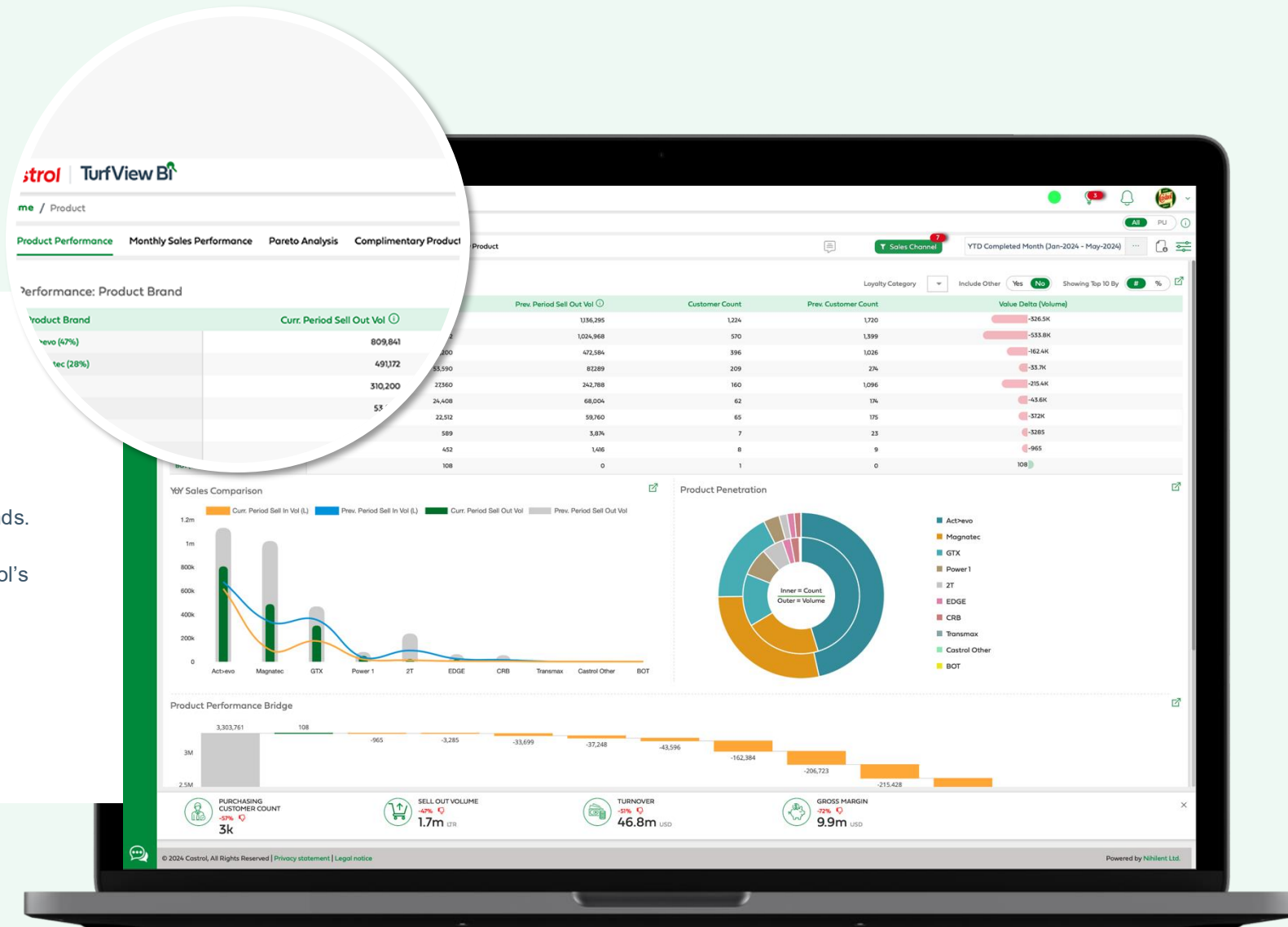
The Product dashboard consist of four sections:

Product Performance: Follows the trends in purchases of individual products and their product families.

Monthly Sales Performance: Two charts contrast monthly purchases and sales by each of Castrol's main product brands.

Pareto Analysis: Based on the 20:80 rule, this ranks Castrol's product categories by how fast they rotate through the warehouse.

Complementary Product: Based on the principle of range selling, this shows the possibility of unrealised sales opportunities from complementary or adjacent products.

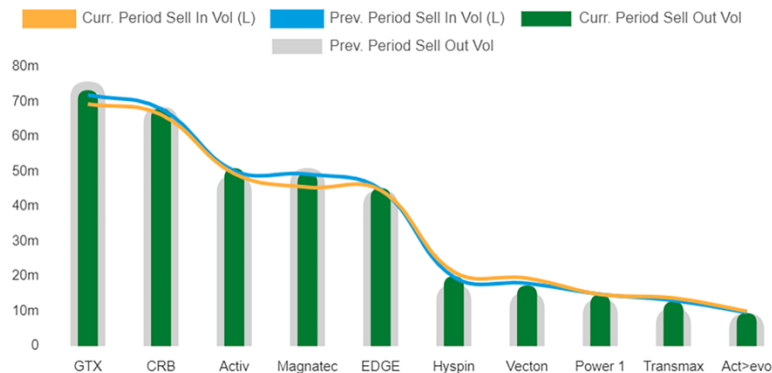


Product Dashboard

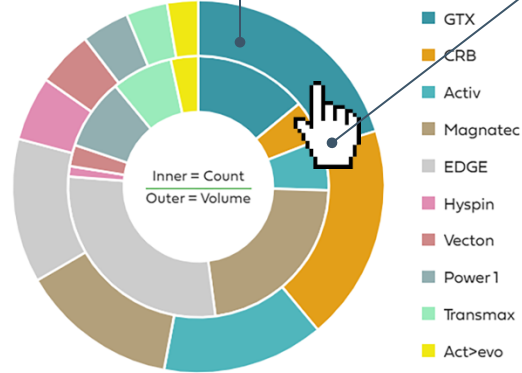
Product Penetration

These charts look at a Distributor's sales by product category.

YoY Sales Comparison



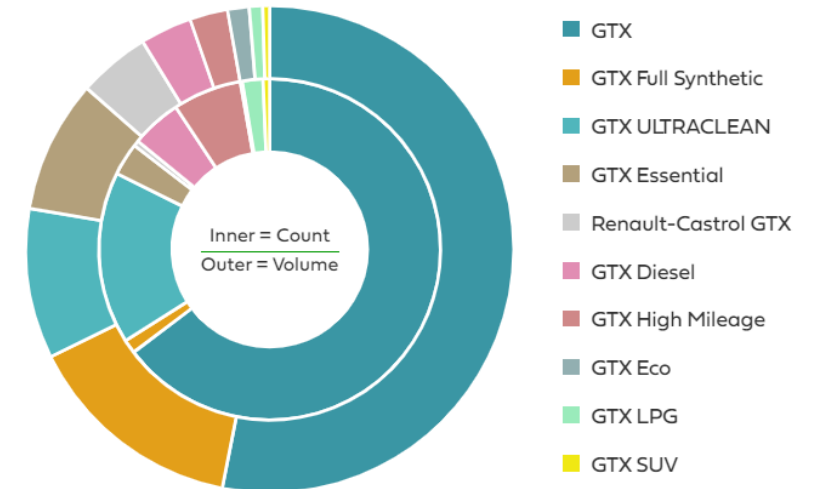
Product Penetration



Below you will find a zoomed view and additional details on these sections



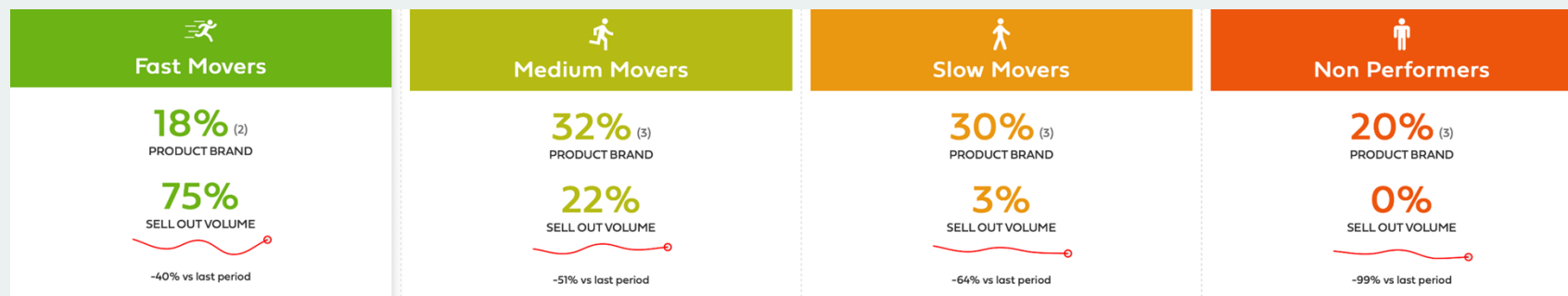
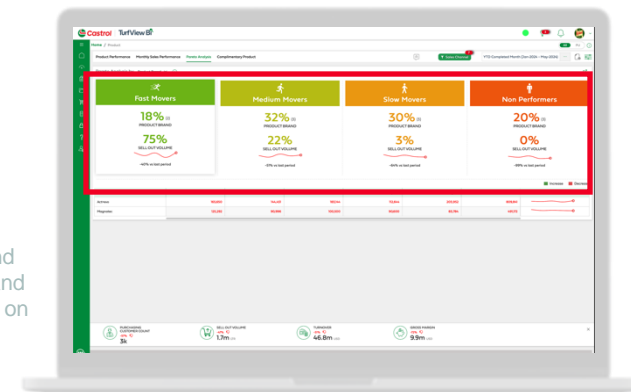
The drill-down facility reveals product penetration up to a product variant level, showing how many customers are buying how much volume



Product Dashboard

Pareto Analysis

Below you will find a zoomed view and additional details on these sections



This chart separates the Castrol product portfolio into different categories, based on the velocity of their stock turns.

- This tracks the performance of each product brand and product variant in each category over time.
- Then, when appropriate, a Distributor can focus on its fastest moving products as they will be generating most of the sales volume.

Customer Loyalty Dashboard

Overview

This Dashboard monitors customer loyalty by monitoring the frequency with which every customer submits each new order.

Purpose

Low customer retention rates may lead to poor financial performance and negative word of mouth for all types of distribution business.

This is because losing a customer is usually difficult to predict, difficult to fix in advance, and it hits the top and the bottom line at the same time.

With TurfView BI's predictive capabilities, customer churn can be anticipated in advance, increasing the likelihood of retaining customers which exhibit early signs of withdrawal.

(Note: This calculation excludes any products on backorder)



Customer Loyalty Dashboard

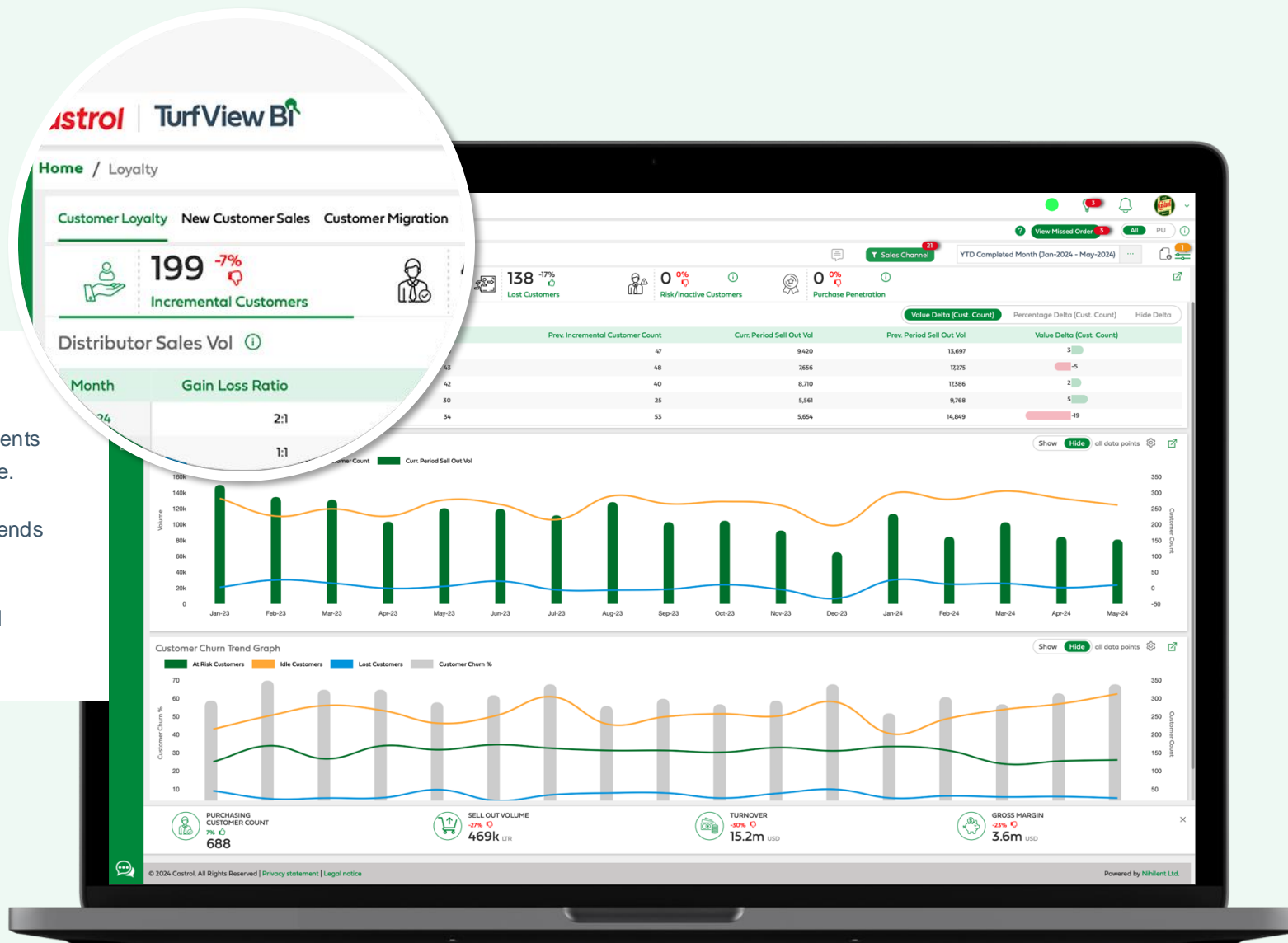
Sections

The Customer Loyalty dashboard consist of three sections:

Customer Loyalty: Customer Loyalty: This connects movements in customer count with changes in a Distributor's sales volume.

New Customer Sales: New Customer Sales: This looks at trends in the sales performance of a Distributor's new customers.

Customer Migration: This Section is only used when Castrol chooses to migrate direct customers to its distributor channel.



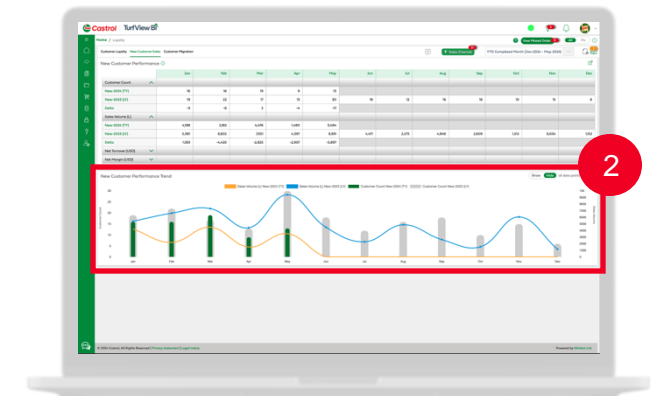
Below you will find a zoomed view and additional details on these sections

Customer Loyalty Dashboard

Primary Charts



> Customer Loyalty section



> New customer sales section

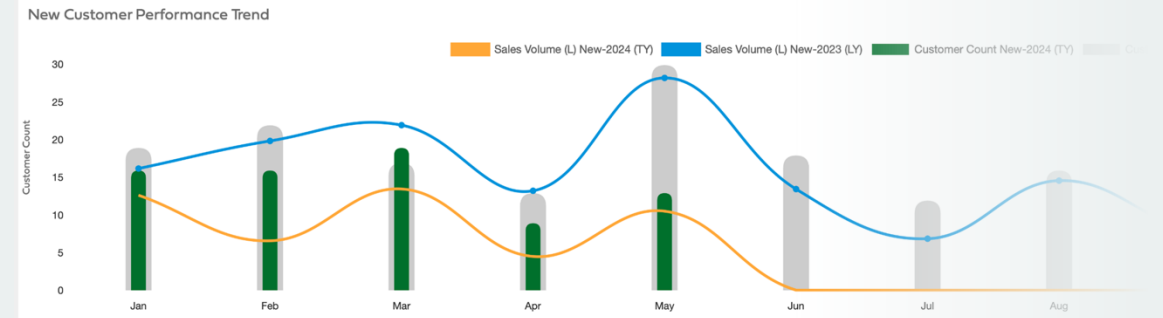
1 Customer Churn Trend Graph



This graph helps predict which customers could become lost in the short term.

- There are trend lines for customers which are considered idle, at risk, and lost
- Focus first on protecting the 'at risk' customers, and then on those that are idle

2 New Customer Performance Trend



This graph shows the sales generated from new customers.

- It reveals the relationship between incremental customers and incremental revenues
- These datapoints can be used to help energise and reward sales effort in acquiring new customers

Demand Dashboard

Overview

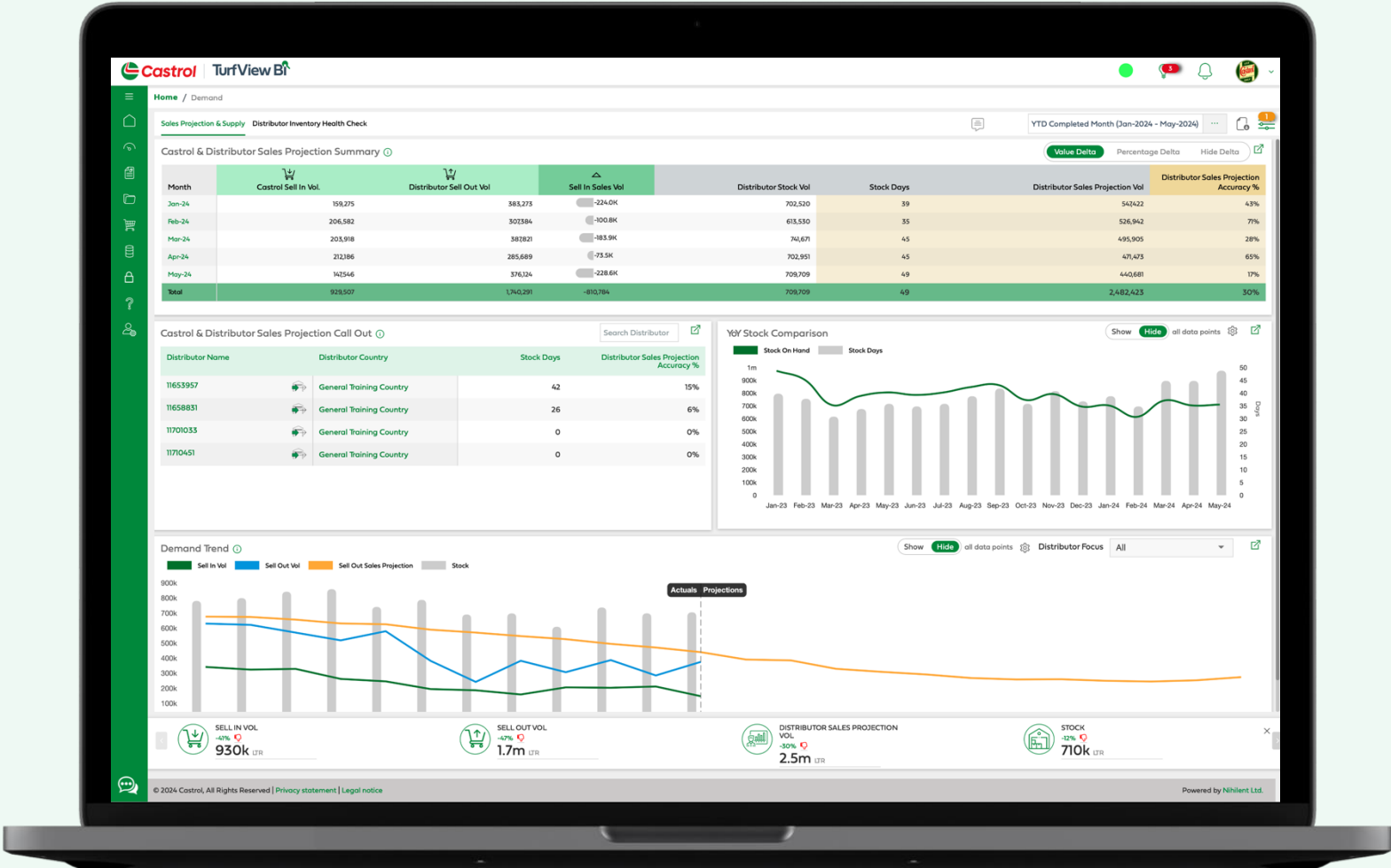
This Dashboard combines purchases, sales and inventory data to help a Distributor track their ability to meet customer demand.

Purpose

Maintaining a balance between demand and supply is central to the management of any distribution business.

When demand and supply are uncoordinated, the result can be an unhealthy mixture of under-stocked and over-stocked products.

TurfView BI analyses connections between demand and supply, categorising products based on the speed and intensity of current and future demand.



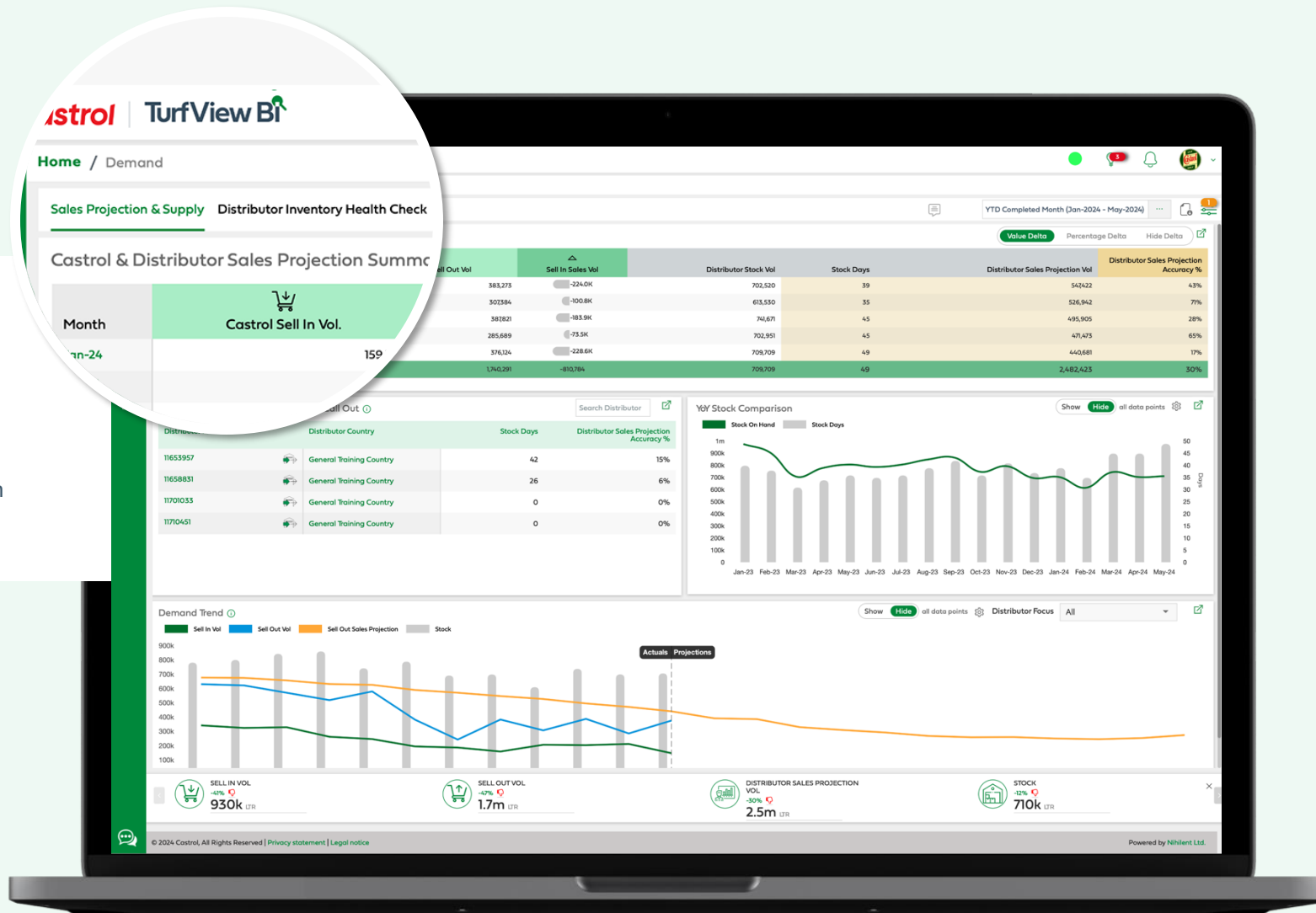
Demand Dashboard

Sections

The Demand dashboard consist of two sections:

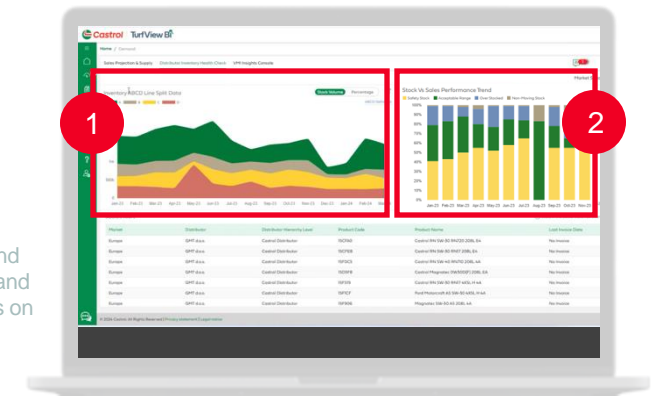
Sales Projection & Supply: This looks for patterns in overall stock levels when compared with current and future demand.

Distributor Inventory Health Check: This separates a Distributor's stock into different categories to monitor trends in inventory management.



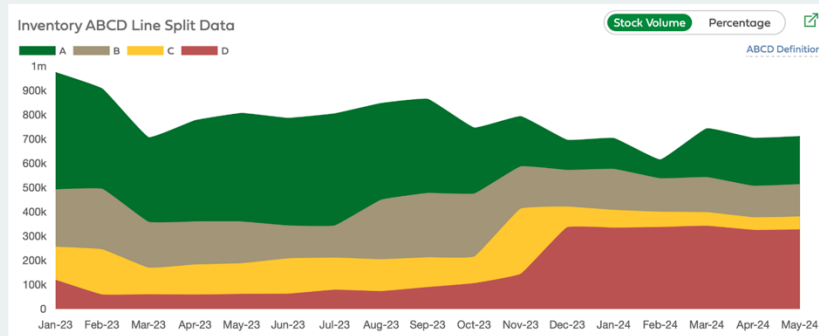
Demand Dashboard

Distributor Inventory Health Check



Below you will find a zoomed view and additional details on these sections

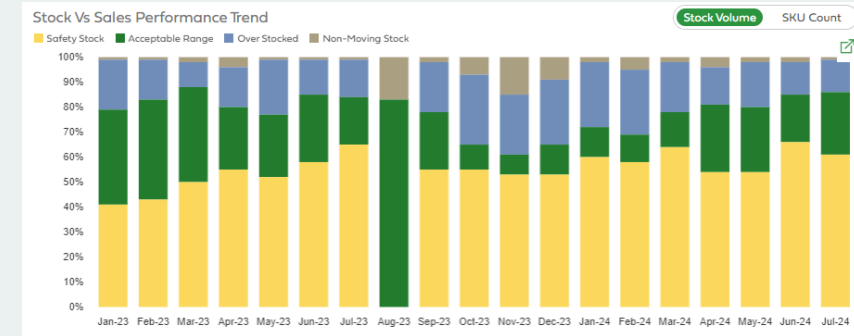
1 Inventory ABCD Line Split Data



This separates stocked products into four categories based on how fast they turn or rotate in the warehouse.

- It shows whether a Distributor's stock is balanced based on its sales trends
- When appropriate, it should be possible to rebalance stock to better meet forecast demand

2 Stock vs Sales Performance Trend



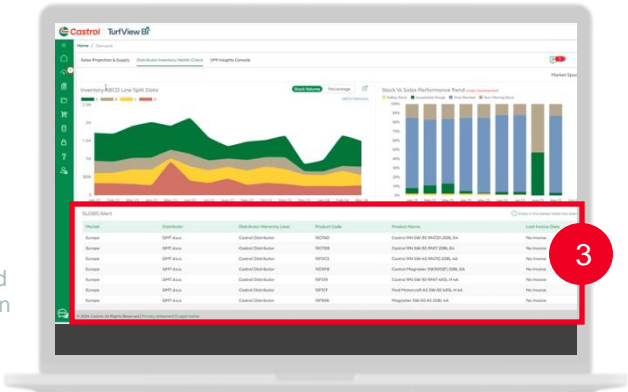
This separates inventory into different categories based on current and historic stock levels.

- It shows the percentage of products which are within acceptable stock levels
- Using a download, this helps identify specific products which are currently either under or over stocked

Product Dashboard

Distributor Inventory Health Check

Below you will find a zoomed view and additional details on these sections



3

SLOBS

SLOBS Alert

ⓘ Data in the below table has been restricted to Top 10 & others

| Market | Distributor | Distributor Hierarchy Level | Product Code | Product Name | Last Invoice Date | Last Stock Date |
|--------|-------------|-----------------------------|--------------|------------------------------------|-------------------|-----------------|
| Europe | | Castrol Distributor | 15CFA0 | Castrol RN 5W-30 RN720 208L E4 | No Invoice | 19/04/2024 |
| Europe | | Castrol Distributor | 15CFE8 | Castrol RN 5W-30 RN17 208L E4 | No Invoice | 19/04/2024 |
| Europe | | Castrol Distributor | 15F0C5 | Castrol RN 5W-40 RN710 208L 4A | No Invoice | 19/04/2024 |
| Europe | | Castrol Distributor | 15D5F8 | Castrol Magnatec 0W30D(F) 208L EA | No Invoice | 19/04/2024 |
| Europe | | Castrol Distributor | 15F519 | Castrol RN 5W-30 RN17 4XSL H 4A | No Invoice | 19/04/2024 |
| Europe | | Castrol Distributor | 15F1CF | Ford Motorcraft AS 5W-30 4XSL H 4A | No Invoice | 19/04/2024 |
| Europe | | Castrol Distributor | 15F906 | Magnatec 5W-30 AS 208L 4A | No Invoice | 19/04/2024 |

SLOBS is shorthand for Slow and Obsolete Products – the slowest of slow movers in the warehouse.

- Only stock items which haven't been sold for a very long time are included in this Table
- It shows each product line by name and by code, plus the date of the latest Stock Record, and the date of the last Invoice, if known

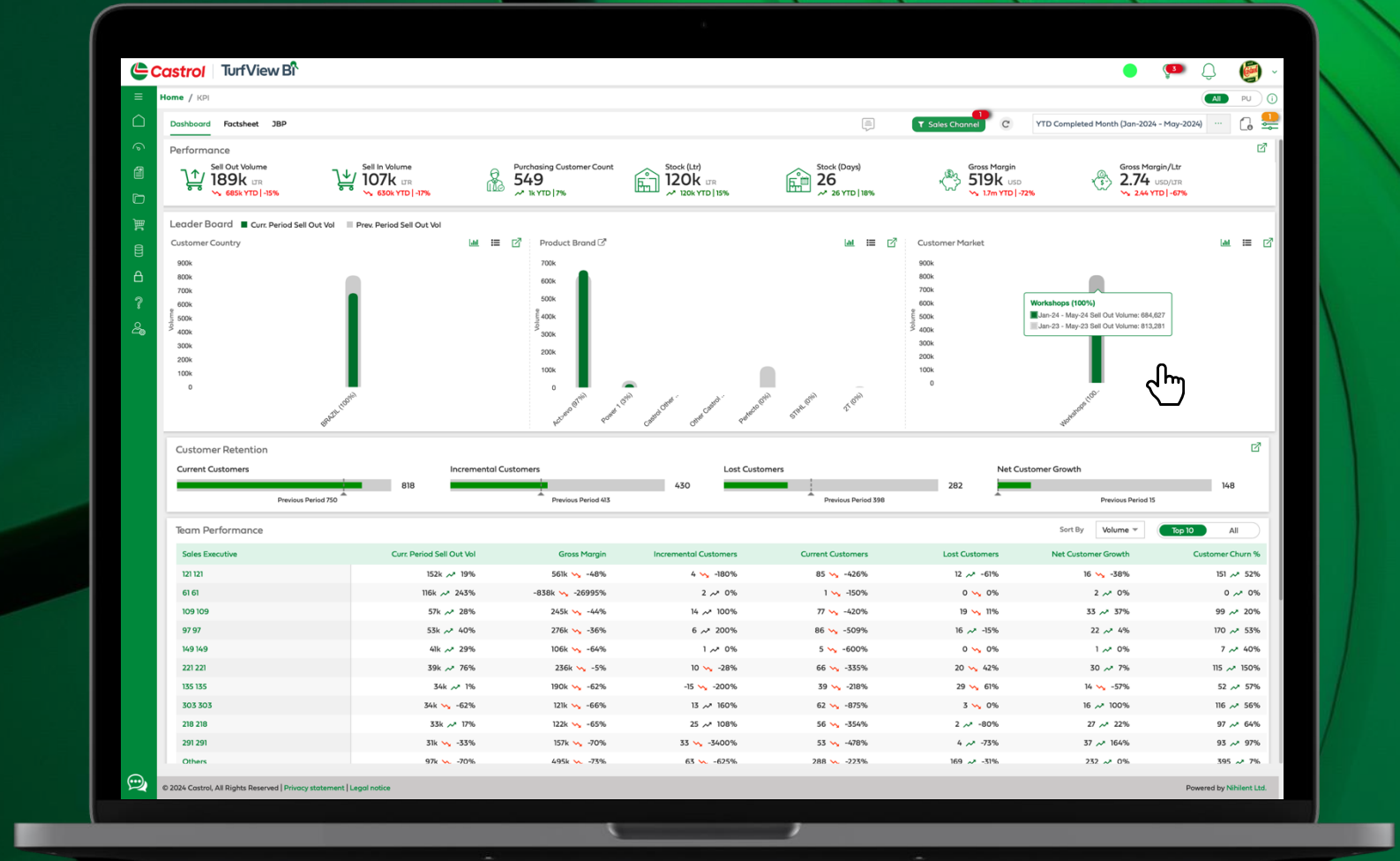
Dashboards

A summary

Main points:

- 1 Within each of the five Dashboards there are between 2 - 4 Sections, and within each Section there are between 1 - 6 Charts.
- 2 In total, there are almost 50 Charts, many of which can give more details via the drill-down facility, or via pop-up features.
- 3 These standard Charts may still not provide exactly the data required. So, it is possible to customize the data analytics to fit any specific requirements.

Customization options are shown on the next four slides.



Customization

This part of the User Guide provides suggestions on how you can customize TurfView BI

Customization

Standard

1

Time Period Filter

Allows time periods to be set in multiple ways, including comparisons with previous periods. This feature opens as a pop-up containing all time-period options.

2

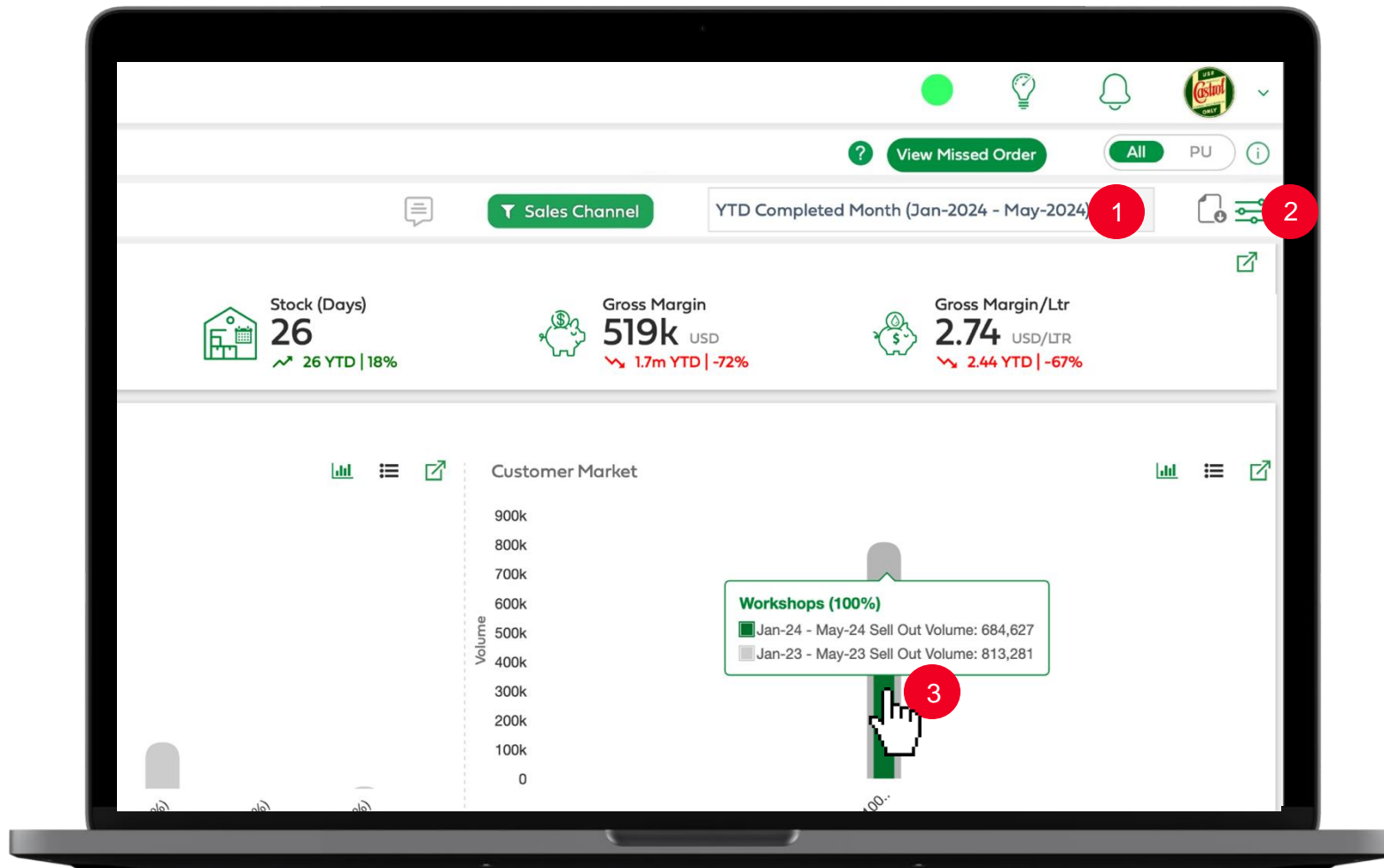
Advanced Filter

Allows a wide variety of data variables to be applied and reset to help lock on just the data that is of interest. This feature also opens-up a pop-up containing all filter options.

3

Drill Down Feature

Most charts and graphs within TurfView BI can toggle between different levels of detail. Just click on any field to see more or less detail.



Customization

Virtual Analyst Dashboard

1 WatchList

Home / Virtual Analyst / Distributor 1 Stock Days [← Back to WatchList](#)

WatchList Configuration ⓘ

WatchList Item Name ⓘ Distributor 1 Stock Days Created By GENERAL TRAINING on 02/11/2020

Swimlane / Hierarchy ⓘ Business Customer Product Geography

Hierarchy Level ⓘ

- Sales Channel
- Customer Market
- Sector
- Sub Sector
- Sub Sector Detail
- Customer

WatchList Unit ⓘ Volume Count Days

Time Increments ⓘ Monthly Quarterly Yearly

Usage of default time period (YTD + Last Year)
Or Use [Customize](#)

Alert Type ⓘ None App Only Email Both

☐ Consolidated Email ☒ Separate Email

Select Sales Channel ⓘ of 5 ⓘ

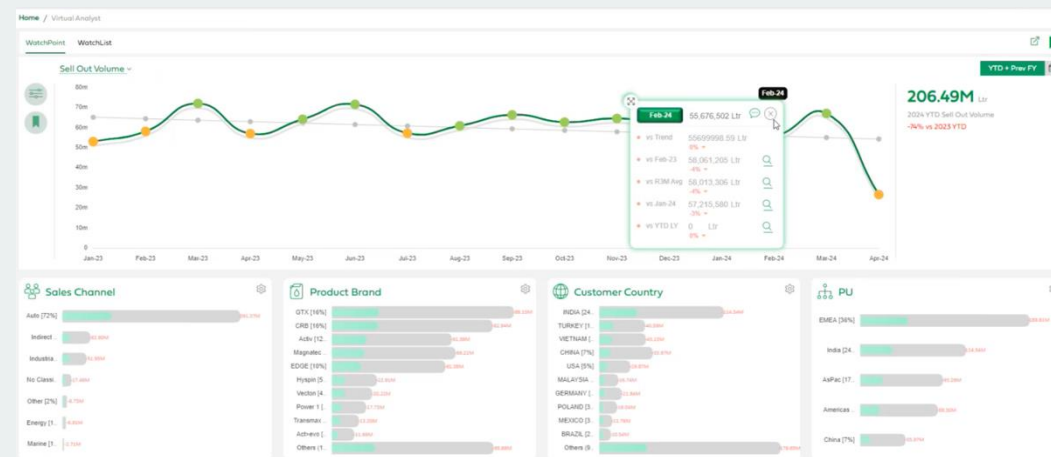
Select Measure ⓘ of 2 ⓘ

| Measure | Benchmark Type | Benchmark Sub Type | Primary Measure |
|---------|----------------|--------------------|-------------------------------------|
| Measure | Benchmark Ty | Benchmark Su | <input checked="" type="checkbox"/> |

Choose your Filters ⓘ

- Configure trend data to monitor movements in a specific metric
- Set alerts for hitting a target, or for specified changes in performance
- Receive automated alerts via the Platform, or via an Email, or via both

2 WatchPoint



- Select the performance metrics which need to be evaluated frequently
- Choose which filters will give the right trend data for detailed analysis
- Use a bookmark to review these performance metrics regularly

Customization

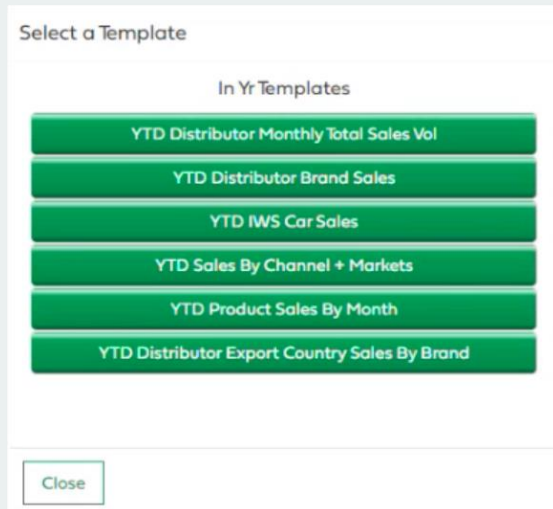
My Reports

There are two approaches for creating reports: 1. Using a series of structured templates, or 2. Using a customizable framework

1 Template

There are six core Templates, organised for comparison within a single year, or between years.

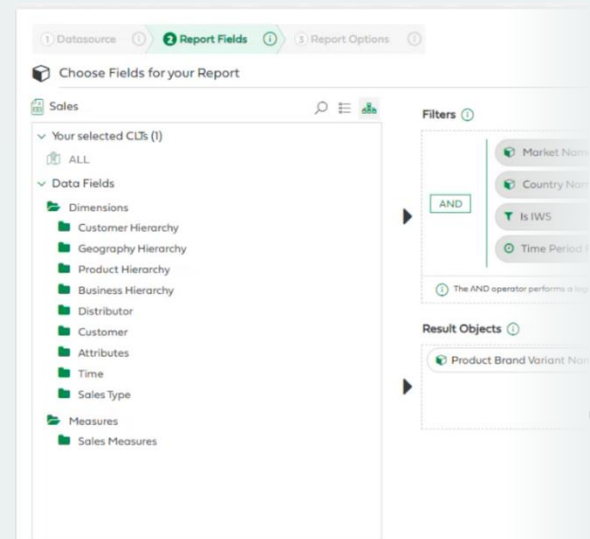
- They are based primarily on sales data analysed in several different ways
- Each Template can be modified to reflect slight differences in the desired outputs



2 Framework

The Framework is infinitely customizable, with their outputs presented as a spreadsheet.

- Selections from two types of Data Field are used to populate Filters and Results Objects
- Filters are used to narrow the scope of the outputs to focus on the primary purpose of each report



i

- The outputs are all available in spreadsheet format to enable subsequent analysis
- All reports can be created and used once, or scheduled to be repeated periodically
- If required, they can be shared automatically with colleagues

Support

This part of the User Guide provides information on how you can find help with issues, and provide feedback on TurfView BI

Support

Sources

- 1 Menu Map**
A brief description of all the major components of TurfView BI
- 2 Knowledge Hub**
A detailed Master Guide which describes the inner workings of TurfView BI
- 3 Glossary**
A definition of all the main terms used within TurfView BI
- 4 e-Learn**
A series of short, animated videos which explain how to use TurfView BI

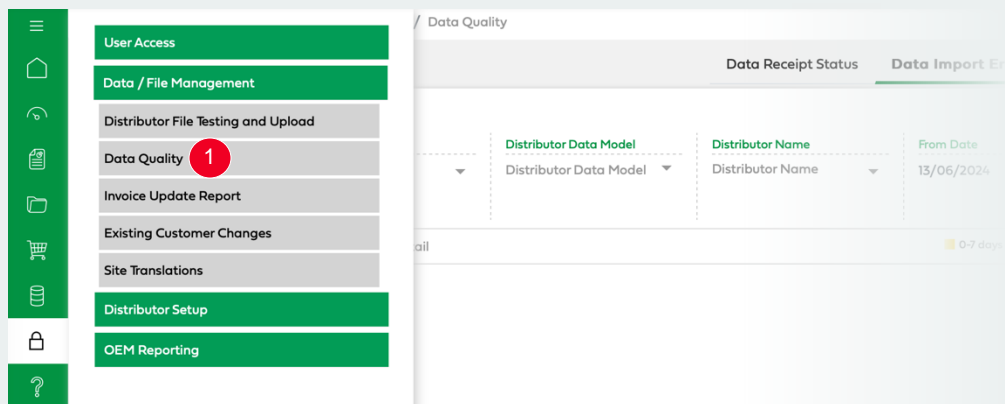


Support

Reliability

Reliable input data is essential for the accuracy of TurfView BI analytics.

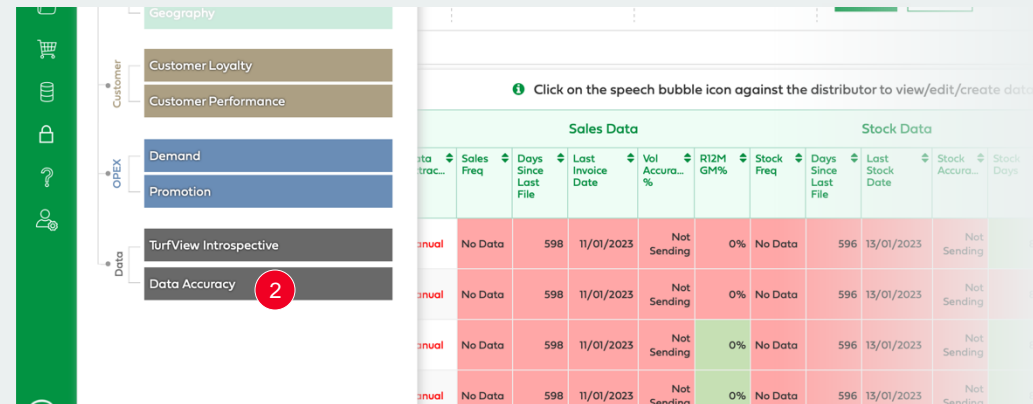
1 Data Quality



The system monitors evidence of incorrect data entry.

Where there are formatting or sequencing or logic errors, the Data Receipt Status tab will provide details of any entries which need to be corrected.

2 Data Accuracy



The system identifies evidence of incomplete data entry.

Where there is a mismatch between Castrol's data and TurfView BI's data, the Data Accuracy facility is where corrections can be made.

Ask your local Castrol representative about how Competition Law applies in your country, or Consult the Master Guide in the Knowledge Hub, and see pages 213 - 223

Support

Confidentiality

Distributors have access to the data and analytics for their firm only. Castrol has access to most data for its Distributors. But, in some countries, Competition Law restricts what Castrol can access.

Castrol cannot see a Distributor's pricing or their customers

For example: Europe, Turkey



Castrol cannot see a Distributor's pricing, but can see their customers

For example: USA, Africa



Castrol can see a Distributor's pricing and their customers

For example: Brazil, Thailand



Support

Feedback

1 Feedback button

This button gives users a means of asking questions or providing information about five different types of query:

- **Enhancement idea(s):** when users have some ideas for how we might improve the system
- **Feedback/Comment/Other:** when users have any personal feedback on any aspect of the system
- **Report a bug:** when users find a problem with performance of the system
- **Submit a Question/Query:** when users want help with using the system
- **User Training Request:** when users want to discuss training on TurfView BI
- **User Support Request:** when users want some specific help with a TurfView BI operation

2 Give Feedback Tab

This button gives all users the opportunity of rating the performance of the TurfView BI system.

