

EXCEL REPORT™

Excellence Series Tools

What are your goals for excellence and how do you measure them? Do your employees, customers and vendors perceive that your business has a commitment to excellence? You won't find these results in any other business software system. If you want excellence in your business, you need ExcelReport.

Benefits

- Know instantly how well you are achieving your goals
- Remember and respond to errors, complaints, ideas
- Monitor and improve your customer, vendor, and employee relationships
- Measure and improve the quality of products and services
- Identify the sources of poor or outstanding performance
- Regularly remind your employees of the things important to your success
- Track your progress toward excellence by month or year

ExcelReport helps you set excellence goals, grade your progress, and train people to excel. You get the tools you need to achieve excellence:

- Set goals for success
- Automatic analysis of normal business processing
- Capture the non-financial information important to your business
- Report card with grades to tell you how you're doing
- Ability to explore the reasons behind every grade

The screenshot shows a window titled 'Success Report Card' with a 'Period Trend' tab selected. It displays a grid of performance grades (PTD) for various categories from 09/30/2015 to 09/30/2017. The categories are Quality, Financial, Customer, Vendor, Employees, and Future. The grades are represented by letters in boxes, such as 'C', 'D', 'B+', 'A-', 'F', 'B+', 'C', 'C', 'C', 'C', 'F', 'F', 'F'.

	PTD 09/30/2015	PTD 10/31/2015	PTD 11/30/2015	PTD 12/31/2015	PTD 01/31/2017	PTD 02/28/2017	PTD 03/31/2017
Quality	C	D	B-	F	F		D
Financial							
Customer	B+	B-	A-	D	D-		C
Vendor	B-	B	B-	F	F	B+	B+
Employees	A-	B	B	C		B-	
Future	C	C	C	C	F	F	F

Excel Summary Report

The screenshot shows a window titled 'SouthWare Web Menu' with a 'Goals' tab selected. It displays a list of goals for 'This Period 7 (Ending 07/31/17)' with performance grades (PTD and YTD) for each goal. The goals are Quality Goals, Financial Goals, Customer Goals, Vendor/Supplier Goals, Employee Goals, and Future-Related Goals. The grades are represented by letters in boxes, such as 'A', 'C', 'B+', 'B', 'F'.

Goals	PTD	YTD
This Period 7 (Ending 07/31/17)		CA
Quality Goals		CA
Financial Goals		
Customer Goals	A	C
Vendor/Supplier Goals	A	B+
Employee Goals		B
Future-Related Goals	F	F

CEO Portal - Goals

FEATURES & FUNCTIONALITY

SUCCESS REPORT CARD

- Six success factors
- Trend analysis
- GPA analysis
- Search grades for particular customers, vendors, products, etc
- See all details behind grades

EVENTS

- Hot key instant entry
- Standard and user-defined types
- Relationship ratings
- Cost of errors and complaints
- Excel point estimate

GRADING FACTORS

- User-maintained A-B-C-D-F grading scales
- Quality grades
- Financial grades
- Customer/vendor/employee grades
- Future preparation grades

PERIOD HISTORY

- Dozens of excellence-related totals and statistics
- Per record per period for last 5 years
- Updated and accessible through other SouthWare modules

QUESTIONS YOU'LL BE ABLE TO ANSWER INCLUDE:

- Which areas of the business need attention?
- Are we making progress toward our goals?
- Are we able to fill customer's orders?
- Are we shipping orders on time?
- What's the average approval rating on sales orders?
- Which items are returned the most (poor quality)?
- How much are errors and complaints costing us?
- What do our customers think about us?
- Are we hitting our financial goals?
- Which vendors are giving us good service?
- What are the recent events involving this customer?
- Have we responded to all the ideas and suggestions we've received lately?
- How solid are our vendor relationships?
- Are our employees satisfied with their careers?
- How well are we preparing for the future?

Goals	PTD	YTD
Thru Period 2 (Ending 07/31/17)		
Quality Goals		C+
Financial Goals		C
Customer Goals	A	C
Vendor/Supplier Goals	A	B-
Employee Goals		B-
Future-Related Goals	F	F

CFO Portal - Goals