



Making work meaningful

Consolidated Report

MEASUREMENT OF EFFICIENCY OPPORTUNITY

Customer/Client Company

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About ValueView™

ValueView™ is a method of measuring the profitability of tasks, positions (jobs) and departments. Profitability is defined as the relationship between the value created in a particular position and the costs related to that position. What is evaluated is not the people involved, but the value, costs and time taken to complete the tasks they perform.

ValueView™ is divided into three phases:

1. Description of the tasks
2. Evaluation of the tasks by the beneficiaries
3. An economic analysis of the value created

The following profitability report contains a summary of the results of the evaluation process. The data and information we relied on when preparing this report are given in individual reports.

This report is divided into the following parts:

1. A table with a summary of the profitability information for the units evaluated. This table helps you to compare the different units of your organisation, their profitability and the value they contribute to the organisation.
2. A list of the profitability information for the key tasks performed by each unit. This information can be used to analyse, prioritise and optimise tasks.

The ValueView™ evaluation uses input from the organisation evaluated. Consequently, the reliability and accuracy of the results of the evaluation depend on the accuracy of the input received from the organisation. The ValueView™ methodology uses a number of embedded data control mechanisms. However, it is impossible to eliminate all errors or inaccuracies. For this reason, we recommend that the evaluation should be carried out on a regular basis (at least annually) or that the initial evaluation should be repeated at least once. The results of the second evaluation will be more reliable, as the people participating in the evaluation will normally make fewer mistakes in the process.

The results that follow are given only for the parameters described in the report and should not be relied on when making any personnel and/or business decisions. Any conclusions from the evaluation should be placed within a wider business context, taking into account other factors affecting the value of the positions evaluated and the strategic usefulness of the positions.

Consolidated list of the results for evaluated jobs

Job	FTE	FTE demand	Profitability	Fit Index™	Recommendation
Analyst	2	2,79	35%	-28%	Invest decisively
Senior controller	1	1,26	30%	-21%	Invest decisively
Sales Manager	3	3,83	27%	-21%	Invest with caution
Logistic supervisor	1	1,25	24%	-12%	Invest decisively
Controller	1	1,11	17%	-31%	Invest with caution
Salesman	1	1,09	7%	-9%	Tailored to the needs of the company
Marketing Specialist	1	0,95	0%	-34%	Optimize with caution
Operation Manager	1	0,91	-13%	-42%	Optimize with caution
Coordinator	2	1,48	-40%	-31%	Optimize decisively

List of **tasks** and their profitability per participant

Analyst

(Time 90% FTE 2,79/2 Efficiency 35% Fit Index™-28%)

Task (Time)	Profitability	Recommendation
Economic analysis for MB and SB (35%)	86 %	Invest decisively
Data inspection for JST (20%)	31 %	Invest decisively
XCV Project coordination (20%)	15 %	Tailored to the needs
Profitability analysis of promotion campaigns (5%)	9%	Tailored to the needs
Monthly reports SIZ (5%)	2%	Tailored to the needs
MDP training programs (5%)	-13%	Optimize with caution
Ad hoc inquiries of other departments (10%)	-43%	Optimize decisively

Senior controller

(Time 100% FTE 1,26/1 Efficiency 30% Fit Index™-21%)

Task (Time)	Profitability	Recommendation
Expo- can process control and reporting (10%)	41%	Invest decisively
Economic analysis for Marketing (45%)	13%	Tailored to the needs
Clients' inquiries (10%)	12%	Tailored to the needs
Training for other departments (5%)	0%	Tailored to the needs
Executive reporting and MIS (30%)	-15%	Optimize with caution

Sales manager

(Time 100% FTE 3,83/3 Efficiency 27% Fit Index™-21%)

Profitability	Profitability	Recommendation
Sales process coordination (20%)	41%	Invest decisively
Project OTC (10%)	32%	Invest decisively
Sales and marketing strategy and its operationalization into measures and tasks (15%)	21%	Invest with caution

The development of product and sales campaigns	2%	Tailored to the needs
Designing sales policy and control (15%)	-3%	Tailored to the needs
Training for field workers (10%)	-11%	Optimize with caution

Logistic supervisor

(Time 95% FTE 1,25/1 Efficiency 24% Fit Index™-12%)

Task (Time)	Profitability	Recommendation
MSE process – logistics (25%)	75%	Invest decisively
Plany tras i terminarz aktualizowany codziennie (15%)	15%	Invest with caution
Logistic costs and contracts management (25%)	11%	Tailored to the needs
Reports for the Supervisory Board (5%)	-21%	Optimize decisively
Relations with external contractors (5%)	-27%	Optimize decisively

Controller

(Time 100% FTE 1,11/1 Efficiency 17% Fit Index™-31%)

Task (Time)	Profitability	Recommendation
Internal reporting control (30%)	13%	Invest with caution
MIS data control – weekly (20%)	7%	Tailored to the needs
Ad hoc questions and orders from Sales (35%)	-10%	Tailored to the needs
Monthly report and distribution (15%)	-34%	Optimize with caution

Salesman

(Time 100% FTE 1,09/1 Efficiency 7% Fit Index™-9%)

Task (Time)	Profitability	Recommendation
Sales reporting (20%)	13 %	Tailored to the needs
Sales visits (65%)	5 %	Tailored to the needs
Market analysis (15%)	-6 %	Optimize with caution

Marketing Specialist

(Time 95% FTE 0,95/1 Efficiency 0% Fit Index™-34%)

Task (Time)	Profitability	Recommendation
Ad hoc financial reports (20%)	20%	Invest decisively
Data for MSE analysis (10%)	13%	Invest with caution
Demand weekly analysis for all products (25%)	8%	Tailored to the needs
Visiting Clients 5/week (15%)	-13%	Optimize with caution
DRE database - updated monthly (10%)	-20%	Optimize decisively
Monthly marketing reports (15%)	-77%	Optimize decisively

Operation Manager

(Time 100% FTE 0,91/1 Efficiency -13% Fit Index™-42%)

Task (Time)	Profitability	Recommendation
Production strategy creation and operationalization and communication (25%)	97 %	Invest decisively
Process and staff management (20%)	7%	Invest with caution
Budget and monthly control actions (35%)	9%	Tailored to the needs
Production planning and control of execution (5%)	-78 %	Optimize decisively
Maintenance and resource planning (15%)	-89 %	Optimize decisively

Coordinator

(Time 85% FTE 1,48/2 Efficiency -40% Fit Index™-31%)

Task (Time)	Profitability	Recommendation
Sales data put into the system (15%)	0%	Tailored to the needs
Business trips of sales staff administration (5%)	-14%	Tailored to the needs
Managing clients question and comments (30%)	-36%	Optimize decisively
Ad hoc clients' inquiries (10%)	-42%	Optimize decisively
Promotions - all logistics and supply (25%)	-58%	Optimize decisively

Key

Time – the time spent on completing the tasks described and evaluated by the beneficiaries (as a percentage (%) of the full working time available in each position). The remaining time is spent on tasks not described in this report. These tasks are not included in profitability calculations. The more working time (up to 100%) is evaluated, the more representative the results of the evaluation are.

FTE- full time equivalent. If the demand for FTE is higher than the current number of FTE, taking on more employees is recommended. If the number of FTE as calculated/ demanded is smaller than the current number of FTE, reducing staff may be considered.

Efficiency opportunity – profitability. Neutral efficiency opportunity = 0%. An efficiency opportunity/ profitability above 0% means that the demand for the given task or job is higher than the current supply – there is opportunity for investment and growth. An efficiency opportunity/ profitability below 0% means that the demand for the given task or job is lower than the current supply – there is opportunity for savings. The profitability measurement for tasks and departments has nothing to do with the measurement of the competence or engagement of the people involved in the tasks.

Fit Index™ is a measurement of the suitability of the job to the company's needs. Fit Index™ is always expressed in negative values. Values from 0% to 15% mean a high-level match of the job to the company's needs. The lower the level of the index, the higher the level of mismatch. Low values of Fit Index™ (below 25%) indicate the necessity of restructuring.

Recommendation

Recommendation is generated automatically, using the ValueView™ algorithm. An 'invest' recommendation means that the organisation will benefit from allocating more resources and giving more attention to certain tasks. An 'optimise' recommendation means that reducing the number of tasks or positions is justified by the beneficiaries' reduced requirements and will be profitable for the organisation. Due to the risk of errors in job descriptions or the inaccuracy of beneficiaries' evaluations, we recommend that the evaluation should be repeated. Each subsequent evaluation will provide more reliable results and help the organisation to calibrate its processes internally.



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