Quorso

How to create and manage KPIs

Advanced Quorso training

2022





STRICTLY CONFIDENTIAL

Introduction

What

As a KPI manager, you can set up a KPI to track the performance of:

- A specific product, sub-category or category
- A combination of multiple products or sub-categories that sit within different parts of your product hierarchy

For example, you might want to track the performance of all 'Lunch' items, or, perhaps a meal deal promotion comprising a sandwich, snack and a drink.

Why

- Setting up a KPI enables you to track performance over time, versus a target.
- You can click into the KPI to view the rank of your site/store(s) on that KPI versus all site/stores in your organisation.
- Quorso will automatically surface opportunities for improvement just within this KPI, that you can create action plans for.

Who can do this

- You need to have KPI manager permissions to set up and manage KPIs. This is controlled by your Project Lead or Quorso Account Lead please contact support@quorso.com to request access.
- Note that your peers in Quorso will be able to see the KPIs that you have created (although, only their data will be populated for each KPI, they will not see your performance data).

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How-To (1 of 2)

		ISSIONS IN PROGRESS 0 🥥	IMPROVEMENT	KPI PERFORMANCE	ALL-TIME SUCCESS 10 missions
	Business				
9 Missions	KPIs (11) Stores P&L E:	splorer	+ Create KPI	Manage KPIs	Filter by store
Business	∧ Sales (5)				© O
🔓 Team	\$76.0k	\$10.25 \$10.00	\sim .	.0%	\$10.0k
O Profile			13 weeks		\$9,000 \$8,500
	Sales per Store	Basket Size	c	onversion Rate	Beer & W
	 \$75.6k (+\$271 vs. last year) 11/32 Stores worse than last year 11 live missions 4.4% better 	\$ \$9.93 (-\$0.07 vs. Ø 21/32 Stores wo Ø 11 live mission	rse than target	90.4% (+1.2% vs. average) 16/32 Stores worse than ave 2 live missions 7.2% better	\$ \$8,811 rage
	∧ Shrink (2)				
Settings	\$1,300	\$700			
A settings	\$1,100 13 weeks	\$500	3 weeks		

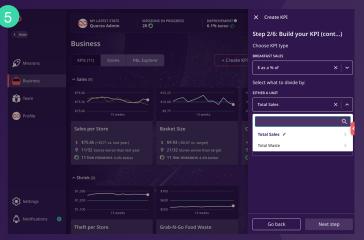
Go to Business screen > +Create KPI

		ISSIONS IN PROGRESS IMPROVEMENT	X Create KPI
	Business		Step 2/6: Build your KPI (cont) Choose KPI type BREAKFAST SALES
9 Missions			s as a % of X ^
Business			م ا
🖥 Team		\$10.25	5
Profile			s as a % of ✓ s per
			C Choose a data type 🗸
			c Choose an item 🗸 🗸
😥 Settings		\$700 \$600 \$500 13 weeks	

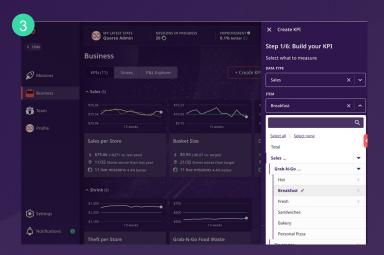
Your KPI can be a straight value or a percentage / \$ per something else.

Create KP Step 1/6: Build your KPI Business Select what to measu DATA TYP Mission 📸 Team Total Expense Sales 📀 Profile Number Availability Theft Labor Hour Labor Spend Setti

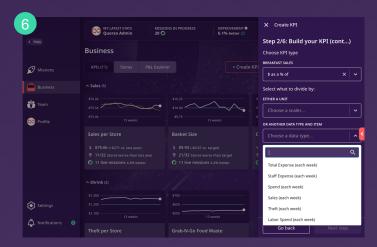
Select the top-level metric/data type. Arrows mean you can click further down a hierarchy.



In this example, we're measuring Breakfast sales as a % of Total Sales.



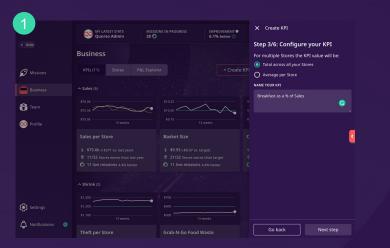
Select one or more category, sub-cats or products that you want to measure.



An alternative selection could be another metric, e.g. if comparing labor or waste to sales.

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How-To (2 of 2)



When looking across all of your sites/stores, select whether you want to display a total or average. We normally set up the total, as you can then filter to a single store.

	Quorso Admin	MISSIONS IN PROGRESS	IMPROVEMENT	X Create KPI	
	Business			Step 6/6: KPI access Incoming Missions will only users who can see this KPI	be generated for
🔊 Missions				WHO SHOULD SEE THIS KPI?	
Business				3 selected	
😚 Team		\$10.25	~~~	Select all Select none	٩
🧿 Profile				a Area Manager ✓	
				General Manager ✓	<
	 \$75.6k (+\$271 vs. last year) 11/32 Stores worse than last y 11 live missions 4.4% better 	\$ \$9.93 (-\$0.07 v ear © 21/32 Stores v O 11 live missio		Quorso Admin 🗸	
Settings		\$700			
		\$500	13 weeks		

Tick or untick which roles can view your KPI.

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× Create KP MY LATEST STATS Step 4/6: Performance measure For each Store, performance will b Business measured against Average of all of O Last year O Budget C Last year (adjusted 🎁 Team O Target 📀 Profile O Trend Stores should be ranked based on the O Performance versus average of all othe Stores Don't worry, Quorso also allows you to see above on the KPI chart. This default can also be changed at any time

Set a baseline for your target line. Average of all other stores is what we refer to as 'performance vs peers', which is an adjusted average.

			OVEMENT O	KPI PERFORMANCE	ALL-TI 10 mi:	ME SUCCESS islons
	Business					
😥 Missions	KPIs (11) Stores P&L Ex	plorer	+ Create KPI	Manage KPIs	🛛 🛛 Filte	r by store
Business	∧ Sales (5)					00
🛱 Team	\$76.0k \$75.5k	\$10.25	95.0%		~•	\$10.0k \$9,500 \$9,000
📀 Profile	\$75.0k 13 weeks	\$9.7513 weeks		13 weeks		\$8,500
	Sales per Store	Basket Size	Con	version Rate		Beer & W
				0.4% (+1.2% vs. average)		\$ \$8,811 (
	 11/32 Stores worse than last year 11 live missions 4.4% better 	 21/32 Stores worse than tar 11 live missions 4.4% better 		6/32 Stores worse than aver live missions 7.2% better		Ø 16/32 st Ø 2 live m
	^ Shrink (2)					
	\$1,300	• \$700 ·····				
Settings		- \$600	_			
🛆 Notifications 🛛 🛽 🔊		\$500 13 weeks				
Notifications 5	Theft per Store	Grab·N·Go Food Waste				

To make your new KPI visible, go to Manage KPIs.

		11SSIONS IN PROGRESS IMPROVEMENT	X Create KPI
	Business		Step 5/6: Launch missions Should Quorso generate missions to impro this KPI?
🔊 Missions			No Your team won't receive missions for this KPI
Business			Yes, if they are high priority Your team will receive a mission for this KPI when it
🃸 Team		\$10.25 \$10.00	Some of their top 4 improvement opportunities O Yes, whenever they are worse than their baseline
📀 Profile			⁸ Your team will receive missions for this KPI whenever they miss their baseline by the amount specified below
			What is the minimum value of missions tha Quorso should generate?
			Your team will only receive missions for this XPI if their value is greater than the minimum opportun value specified. If this is left blank then the highes
		\$700	priority missions will be sent, which may include Missions which are a long way off the mark but
Settings		- \$600	lower value ("quick wins")
		\$500 13 weeks	Incoming missions will be prioritized base

Determine whether GMs will receive missions based on your KPI (when underperforming vs your target). Note that this will apply to everyone in your business.

2	Conversion Rate		× suc
Hide	Beer & Wine Revenue	New KPI	
	Sandwiches as a % of Total Sales	New Group	
9 Missi	Shrink	▲ Move up	y s
Busir	Theft per Store	✓ Move down	0
Team	Grab-N-Go Food Waste	Edit	\$10.0 \$9,50 \$9,00
Profil	Labor	🗂 Delete	:8,50
	Labor Spend		
	Labor Hours per Transaction		
	Ungrouped		
	Breakfast Sales \$		
3 Settir	Grab-N-Go Waste % of Grab-N-Go Sales		
) Notif	Sreakfast as a % of Sales	Done	

Move it up to the relevant group, or create a new group. Come back here to edit or delete KPIs.