



**PERFORMANCE ANALYSIS**



Performance  
Analysis

# Overview

CA MAHEK R.  
TANNA

Need of Biz Health

Function of Biz  
Health

Financial Dashboard  
(All Companies.)

Sales Dashboard  
(All Companies)

Key Tools(KPIs) of  
Manufacturing  
Companies.

Key Tools(KPIs) of  
Servicing Companies .

Benefits of Biz  
Health

Contact Us

# CA. MAHEK R. TANNA

- Highly analytical and forward-thinking CFO(Financial Advisor) with progressive experience of propelling the growth of Manufacturing Companies and Servicing Companies. Through Virtual CFO service, He will provide strategy and direction to grow company. CA Mahek Tanna is coming with exceptional Business Analytical skill and have deep knowledge in practical aspect of Marginal Costing.
- He is the author of book titled “ AN ANALYSIS - FINANCE BILL, 2020”. The E Book is available at Amazon . He wrote many articles on various subject and uploaded on CAclubIndia. He have YouTube channel named “CA Mahek R. Tanna” for sharing knowledge.
- He participated in many programs of WICASA and Institute of Chartered Accountants of India[ICAI] like GST certificate program, Study Circle’s Events, etc. He also got four Awards from Lohana Uvak Pragti Mandal including a Golden Medal.



# Need of Biz Health

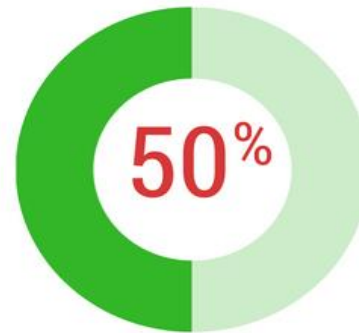


## STATISTICS



**of SME's with 20 staff or less, fail to survive their first 3 years of operation.**

Source: Ministry of Business, Innovation and Employment's 2014 Small Business Sector Report.



**of all businesses survive 5 years or more, while only one third survive 10 years or more.**

Source: Harvard Business Review.

# Functions of Biz Health



# Sales Dashboard (All Companies)

## Revenue

**\$1,061 M**

→ Previous = \$906 M  
→ % Change = +14.61%

Trend 

## New Customer

**10,719**

→ Previous = 11918  
→ % Change = -11.21%

Trend 

## Gross Profit

**\$192.13 M**

→ Previous = \$183.61 M  
→ % Change = +4.43%

Trend 

## Customer Satisfaction

**93.13%**

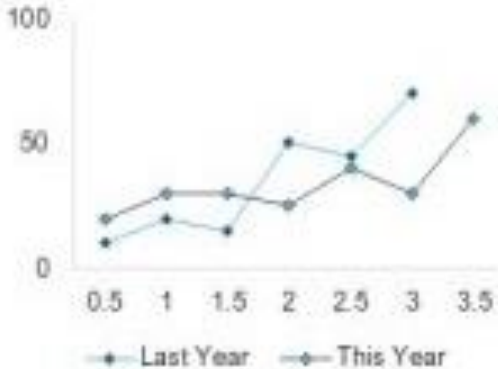
→ Previous = 79.82  
→ % Change = +14.29%

Trend 

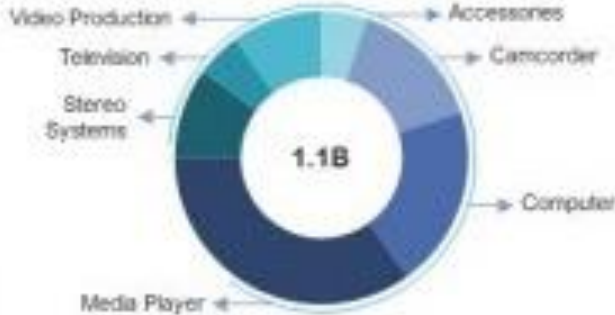
Sales by Month



Sales Comparison

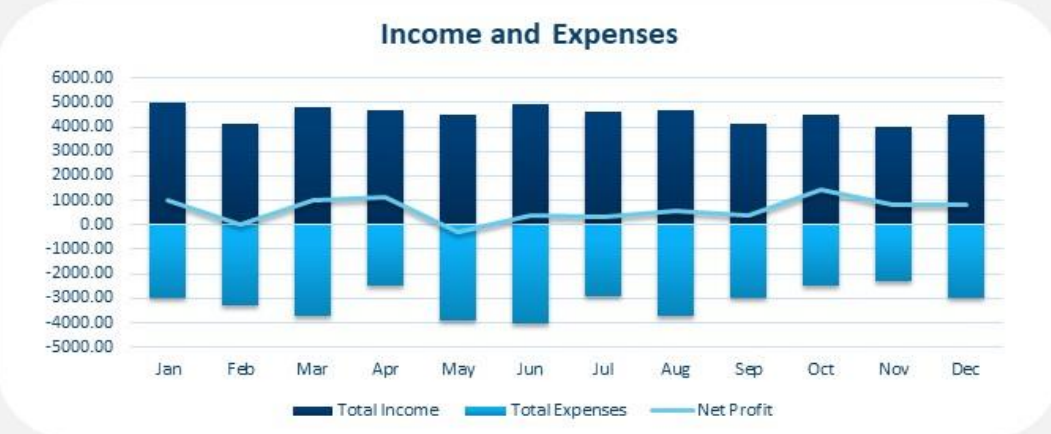
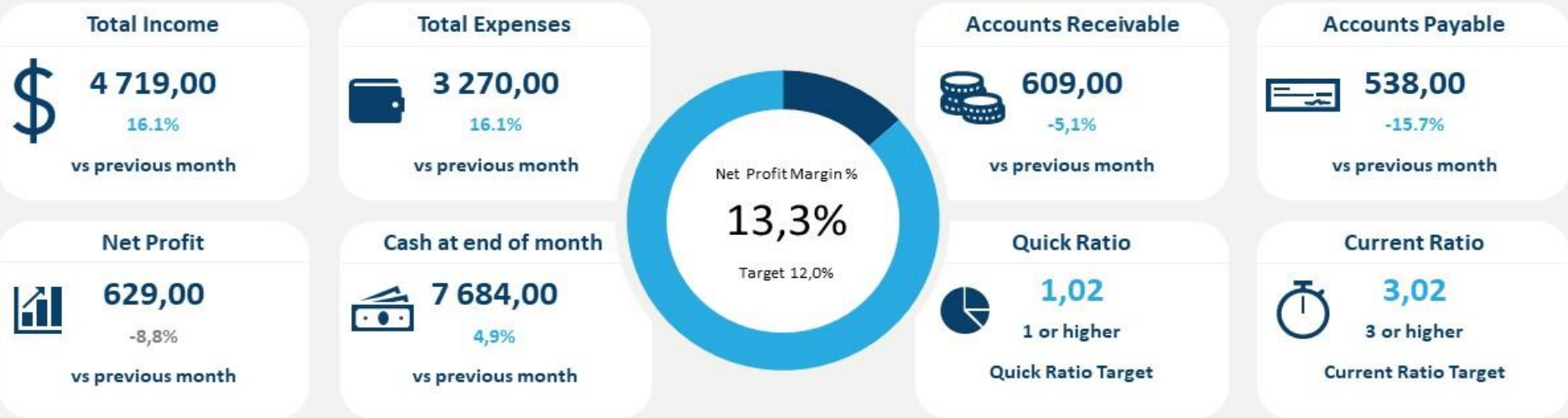


Sales by Product Category



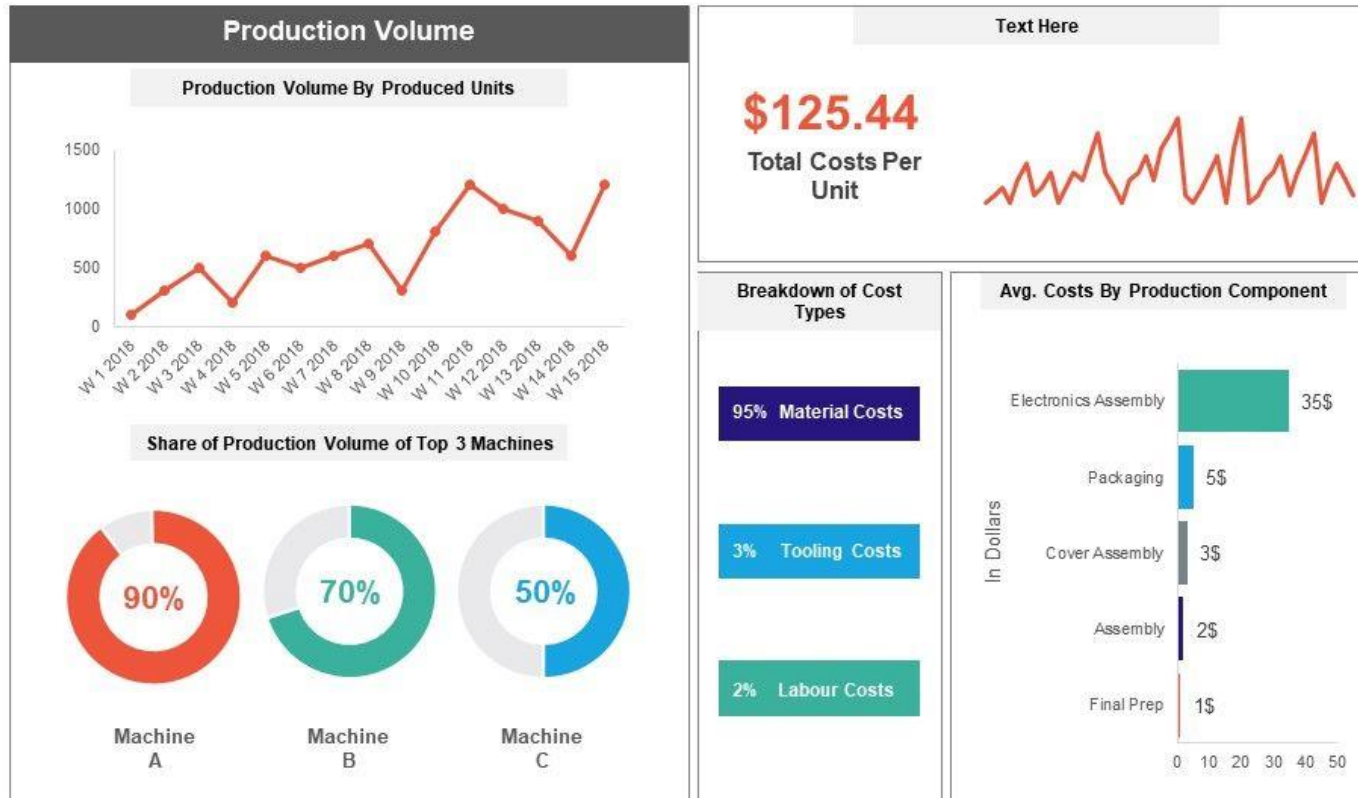
# Financial Dashboard (All Companies)

## FINANCIAL DASHBOARD



# Key Tools(KPIs) of Manufacturing Companies.

## Manufacturing KPI Dashboard Showing...



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".



# Key Tools(KPIs) of Servicing Companies

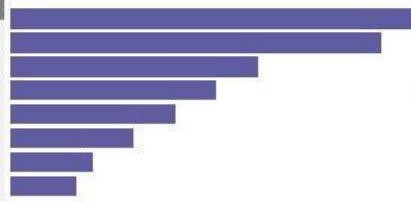
## Professional & Technical Services KPI Dashboard...

### Corporate Summary YTD May

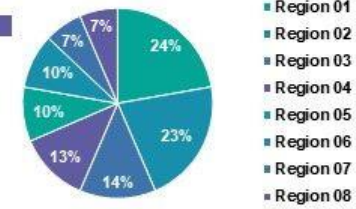
Order Qty COGS and Sales 000s

State	12 Mth Trend	Order Qty	Cost of Goods	Sales
State 01		75	2,173	3,250
State 02		72	2,165	3,153
State 03		48	1,294	1,861
State 04		34	1,117	1,658
State 05		28	907	1,285
State 06		26	870	1,249
State 07		23	672	922
State 08		22	609	868

Sales Chart



### Sales By Region



### Customer Satisfaction 2018



**78%**

Customer Satisfaction Increased By 6.0% Compared To Last Year

### Order Quantity Comparison 000s



### Total Customers CY V PY

State	Trend	PYD	CYD	Var.
State 01		248	240 ↓	(4%)
State 02		206	218 ↑	(7%)
State 03		138	147 ↑	(8%)
State 04		105	113 ↑	(9%)
State 05		96	94 ↓	(3%)
State 06		49	83 ↑	(73%)
State 07		125	83 ↓	(35%)
State 08		67	76 ↑	(15%)

### Sales By Product Type



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".



# Benefits of Biz Health

Nowadays,  
Chartered Accountants are  
growth partner of Business.

“I Need MBA’s  
to run my  
business but I  
need CA’s to  
teach MBA’s how  
to run the  
business.!!

- Ratan Tata

Source:[https://twitter.com/eep\\_india/status/938274556552282114](https://twitter.com/eep_india/status/938274556552282114)



# Thank You



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