

SAMPLE REPORT

Data readiness diagnostic

Arvelle Industrial Supply · One-week diagnostic

About this sample. Arvelle Industrial Supply is a fictional company. Its people, systems and figures are illustrative and do not describe any real client.

Summary

1

Forecasting can start now.

Five years of consistent order history and logged lost sales support a pilot on the top 2,000 SKUs.

2

The sales assistant can pilot in month 6.

31% of active SKUs lack the attributes customers ask about, and 2,900 are likely duplicates.

3

Three problems put both projects at risk.

Revenue has three definitions, the nightly load failed or ran late on 11 of 90 days, and nobody owns product data.

RECOMMENDATION

Run a 10-week forecasting pilot toward the CFO's \$3M inventory target.

Fix data ownership, metric definitions and pipeline alerts at the same time, so the sales assistant can follow.

Arvelle asked one question: is our data ready for AI, and what comes first?

“Before we spend on AI, I need to know if our data is good enough.” CEO, at kickoff

Arvelle at a glance

- Industrial MRO distributor
- 400 employees, 14 branches in IL, IN and WI
- \$210M revenue, 48,000 SKUs
- Three-person data team under the CFO
- Cloud warehouse fed nightly by 14 sources

1

Inside sales assistant

Answer product, stock and quote questions in seconds instead of minutes.
Asked for by the VP Sales

2

Demand forecasting

Cut inventory 10% (about \$3M of working capital) without lowering the fill rate.
Asked for by the CFO

Five days: nine interviews, 14 data sources and 90 days of pipeline history

MON

Kickoff and access

CFO interview.
Read-only access to the warehouse, BI and ERP reports.

TUE

Interviews

Eight interviews across sales, purchasing, branches, IT and data.

WED

Hands-on review

Profiled 48,000 SKUs.
Read 90 days of pipeline runs and the top 20 dashboards.

THU

Synthesis

Ranked the findings, sized the options and drafted the roadmap.

FRI

Readout

This deck, presented to the CEO, CFO and VP Sales.

Not in scope: security review, vendor or tool selection, and any change to production systems.

Sales history is ready: forecasting can start now, with one fix first

Forecasting needs	What I found	Status
3+ years of order history by SKU and branch	5 years since the 2021 ERP migration, with consistent keys	Ready
Lost sales logged at stockouts	Logged on 9 of 10 stockouts in a 200-order sample	Ready
A baseline to measure against	Branch min/max levels, set in spreadsheets once a year	Ready
A reliable daily inventory feed	Inventory extract failed or ran late on 6 of the last 90 days (page 8)	Fix first

PILOT SCOPE

2,000

SKUs, 64% of revenue

3 branches, 10 weeks

Target: 10% less inventory at the same fill rate

Product data blocks the assistant: 31% of SKUs lack searchable attributes

31%

of 48,000 active SKUs miss size, material or spec attributes

2,900

likely duplicates: one part number under two item records

3

description formats, left over from two acquisitions

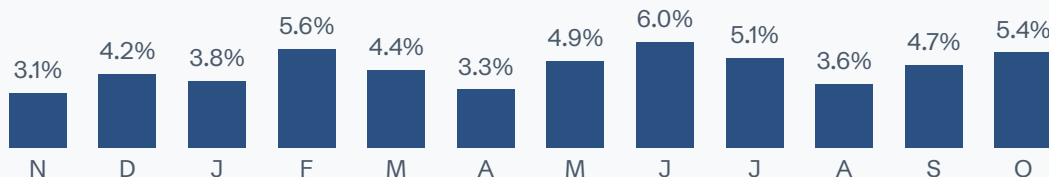
Why it matters

- Reps estimate a quarter of their time goes to product lookups. That is the time the assistant was meant to save.
- An assistant working from incomplete records gives wrong answers, and reps stop trusting it.
- The 9,000 most-searched SKUs account for 85% of lookups, so the cleanup can start there.

Revenue is defined three ways, so reports disagree by 3-6% a month

Team	Revenue means	Used in
Finance	Invoiced, net of rebates and returns	Board pack, P&L
Sales	Booked orders, at order date	Sales dashboards, commissions
Branches	Invoiced, excluding freight	Branch scorecards

Gap between finance and sales revenue, last 12 months

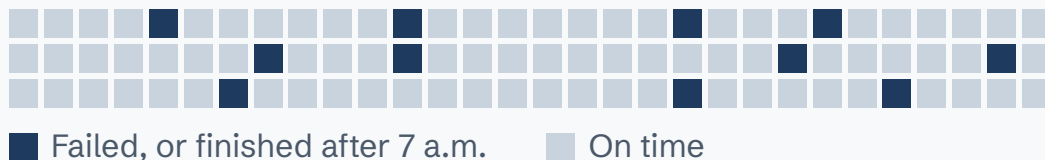


Why it matters

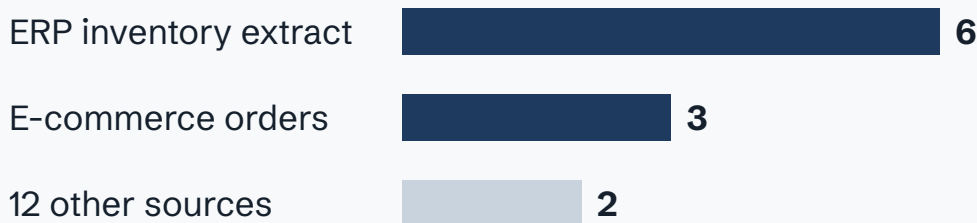
- Analysts spend about two days a month reconciling the board pack by hand.
- Margin has two definitions as well: 4 of 14 branches change rank depending on which one is used.
- Without one agreed definition, finance and sales will disagree on whether the forecasting pilot worked.

The nightly load failed or ran late on 11 of 90 days, with no alerts

Last 90 nightly runs



Bad nights by source



Why it matters

- Users spotted stale data before the data team did on 8 of the 11 days.
- A forecast run on a missed inventory load would reorder stock that is already on the shelf.
- Two sources caused 9 of the 11 bad nights, so the fix is narrow.

Nobody owns product data, so fixes don't stick

Who edits it

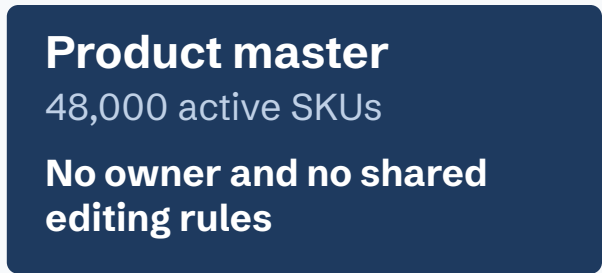
Purchasing



E-commerce team



Branch staff



Who depends on it

Dashboards and reports



E-commerce site



Sales assistant (planned)



40%

of the 6,000 items fixed in a 2024 catalog cleanup have drifted back

140

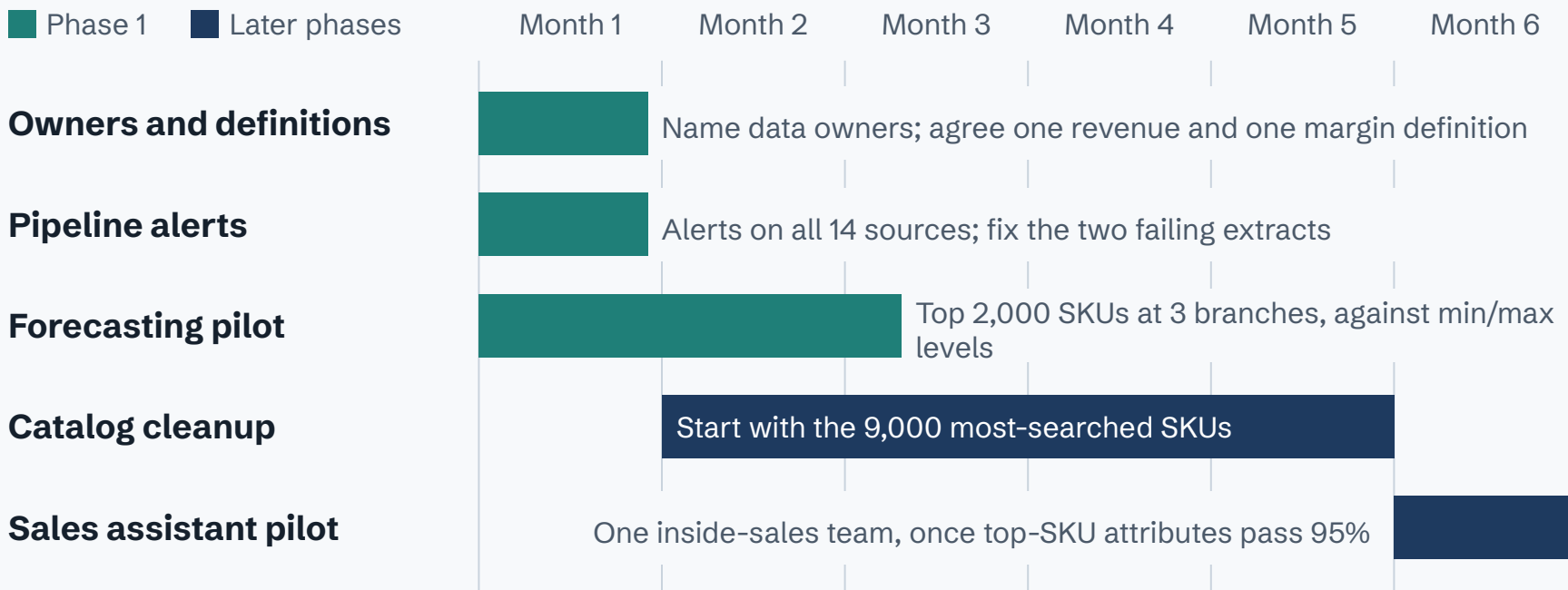
ad hoc requests to the three-person data team last quarter, about 60% of its time

Three ways forward: B delivers a result in 10 weeks with the least risk

Option	What it means	First result	Effort	Main risk
A. Assistant first	Clean the catalog, then build the sales assistant	5–6 months	High	Long wait for a result; cleanup drifts back without owners
B. Forecast pilot plus foundations Recommended	Forecasting pilot now; owners, definitions, alerts and catalog cleanup in parallel	10 weeks	Medium	Needs a named data owner by week 2
C. Platform rebuild first	Replace the warehouse and pipelines before any AI work	9–12 months	High	Leaves ownership and definitions, the real blockers, unfixed

Effort counts Arvelle staff time plus outside help.

Forecasting results arrive in week 10; the assistant pilot starts in month 6



Next steps

Decisions needed by the end of next week

- 1 Approve Option B.
- 2 Name an owner for product data.
- 3 Choose the three pilot branches.

First two weeks after approval

- Ownership and definitions workshop with finance, sales and purchasing
- Alerts switched on for all 14 pipeline sources
- Pilot data pulled and the current baseline measured

Sample report. Arvelle Industrial Supply is fictional; all figures are illustrative.

PHASE 1 • FIXED QUOTE

10 weeks

- Forecasting pilot: top 2,000 SKUs at 3 branches
- Data owners named; one revenue and one margin definition
- Pipeline alerts on; two failing extracts fixed

Fixed price: \$80,000

Catalog cleanup runs in parallel from month 2 and is quoted separately.

Appendix: interviews and data reviewed

Interview	Length	Data reviewed	Scope
CFO (sponsor)	60 min	Warehouse	312 tables from 14 sources
VP Sales	45 min	Pipeline runs	Last 90 nights
VP Purchasing	45 min	Dashboards	Top 20 of 140, 80% of views
Inside sales manager	45 min	Product master	48,000 active SKUs profiled
Customer service lead	45 min	Order history	5 years of order lines
Branch manager, largest branch	45 min	Item search logs	90 days, e-commerce and ERP
IT director	45 min	Data team tickets	Last quarter, 140 requests
Data engineer	60 min		
Senior analyst	45 min		