EXECUTIVE BUSINESS BRIEF

Retail Sales Performance Diagnostic

Executive diagnosis, KPI assurance, and a 30-day decision plan

BUSINESS ANALYSIS | QUANTITATIVE RESEARCH | DECISION SUPPORT

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PORTFOLIO SAMPLE · NOT CLIENT RESULTS

THE MANAGEMENT QUESTION

Reported revenue change

-14.8%

Unit volume

+48.3%

Why did revenue and profit fall while volume rose?

Executive readout

Volume improved, but value realization and profit weakened. Treat the driver story as provisional until KPIs reconcile.

Revenue change

-14.8% reported H1→H2 movement. Confirm period, net/gross definition, returns and filters.

Unit volume

+48.3% reported H1→H2 movement. Increased volume did not translate into stronger value realization.

Average selling price

-33.1% reported movement. Definition and weighting need validation before attributing drivers.

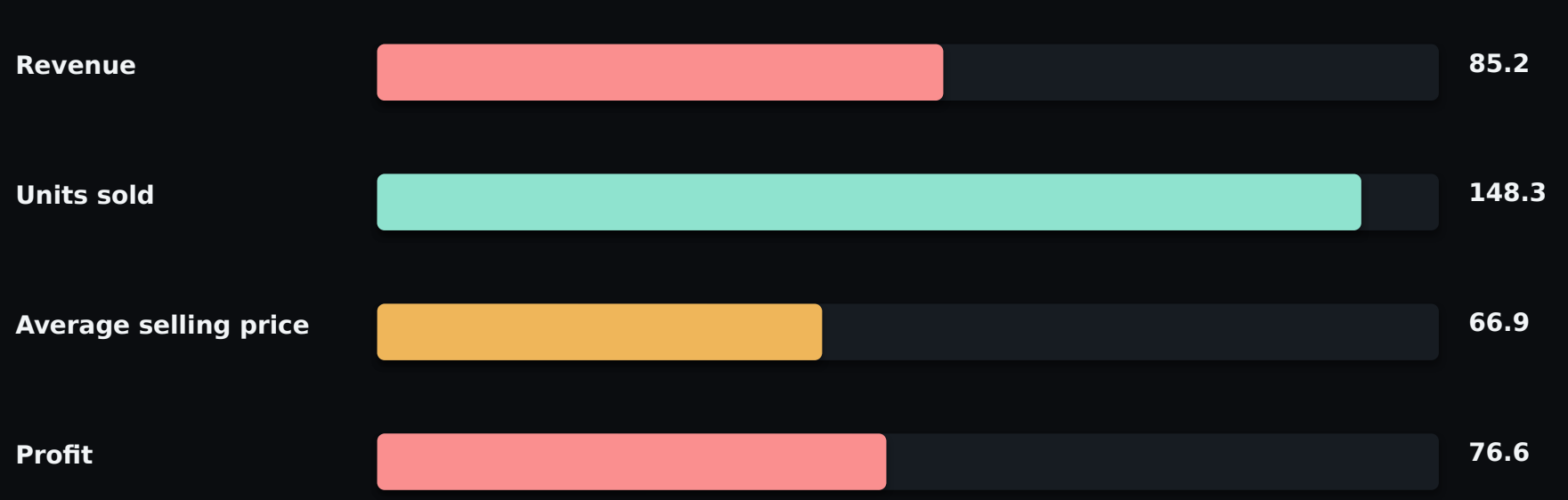
Management action

Reconcile revenue, units and ASP first; then investigate dimensions and test interventions with profit-aware guardrails.

What the reported KPIs say

H1 = 100 index. The chart is an executive screen for where to investigate, not causal evidence.

H2 INDEX (H1 = 100)



Signal

More units did not translate into stronger reported revenue or profit. Check price/discount pressure, mix shifts, and inconsistent definitions.

Source figures describe a synthetic portfolio case. Validate before using the narrative externally.

KPI assurance gate: reconcile before explaining

Under Revenue = Units × weighted ASP, the published headline changes do not reconcile.

Units index

148.3 (H1 = 100). Use consistent period and included transactions.

ASP index

66.9. Recalculate as net revenue / units with consistent weights.

Implied revenue index

148.3 × 66.9 / 100 = 99.2, or about -0.8%.

Reported revenue index

85.2, or -14.8%. The 14.0-point gap is a definition / weighting / calculation exception until proven otherwise.

Driver hypotheses to test after reconciliation

These are hypotheses, not findings. Quantify each driver and distinguish correlation from causal evidence.

Price & discount leakage

Test realized price vs list price, discount rate, promotion exposure and price bands. Evidence: line-item price, discount and units.

Product / customer mix

Check whether volume shifted toward lower-ticket products, bundles or segments. Evidence: SKU, category, basket and cohort.

Channel / regional mix

Compare unit economics across regions, store/digital channels, fulfillment and fee fields.

Returns, costs & metric logic

Validate returns, cancellations, cost allocation, timing, currency and gross/net definitions. Evidence: return ledger and metric lineage.

30-day decision plan

Sequence the work from conflicting KPIs to a defensible, testable management decision.

WEEK 1 · RECONCILE

Metric dictionary; source-to-report trace; tie out revenue, units, ASP and profit.

WEEK 2 · DIAGNOSE

Price-volume-mix bridge; product, segment and channel cuts; anomaly review.

WEEK 3 · TEST

Design a controlled price / discount or mix intervention with explicit guardrails.

WEEK 4 · DECIDE

Executive readout comparing lift, downside, confidence and operating cost.

Executive dashboard: signal, quality, action

Leadership needs to know what changed, whether the numbers are trusted, and what decision comes next.

OUTCOME

Net revenue · gross profit · contribution margin. Report value outcomes, not volume alone.

DRIVERS

Units · weighted ASP · discount rate. Drill down by product, region, segment and channel.

RISK / QUALITY

Returns rate · KPI reconciliation · data completeness. Flag definition mismatches before publication.

DECISION

Pilot lift · guardrail breaches · next action / owner. Name the reviewer and review date.

THE DECISION

Approve the reconciliation sprint.

Hold broad pricing changes until the KPI bridge is defensible.

REQUEST FROM FINANCE / DATA

Transaction-level net revenue, units and selling price. Discounts, returns, cancellations, costs, periods, definitions and report filters.

APPROVAL TO MOVE FORWARD

Name Finance and Commercial owners. Agree metric definitions and success thresholds. Review a reconciled driver bridge before test launch.