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Operational Intelligence:

Turn Your Data into Confident Decisions

Practical Steps to Improve Visibility,
Understand What Matters and Act Confidently.

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Introduction

Every business generates lots of operational data. Orders, inventory, sales, purchasing, finance and customer activity all create information that can help teams understand how the business is performing.

The challenge is turning that information into something people can actually use.

When data sits across different systems, reports and spreadsheets, teams can spend valuable time gathering and checking information before they can begin to understand what it means. And when information arrives too late, businesses are left reacting to what has already happened.

Operational intelligence is about closing that gap.

By bringing relevant information together, making it easier to access and focusing attention on what matters, businesses can move from simply reporting performance to making better-informed decisions.

This guide explores five practical steps (and the questions to ask yourself) to help turn everyday operational data into action.

Step 1:

Bring the Right Information Together

Better decisions start with seeing an accurate view of the entire business.

Different areas provide different parts of that picture:

+ **Sales** shows what customers are buying.
+ **Inventory** shows what's available.
+ **Purchasing** provides insight into demand and supply.
+ **Finance** shows the impact on costs, margins and cash flow.

Looking at any one of these in isolation can make it harder to understand what's really happening. Connecting relevant operational information helps teams see the relationships between different areas of the business.

For example, falling sales could be caused by changing customer demand, but they could also be linked to stock availability. Growing revenue may look positive until rising costs reveal that margins are being squeezed.

The aim is to connect the information needed to understand the decisions you're trying to make.

Ask yourself:

Can you see how activity in one part of your business is affecting another?

Step 2:
Make Information Easier to Access

If teams regularly wait for someone to produce a report, search through spreadsheets or ask another department for figures, decision-making inevitably slows down.

Different roles will also need different information.

+ A managing director may want an overall view of performance.
+ Purchasing needs to understand demand and availability.
+ Finance may focus on costs, margins and cash flow.
+ Operational teams need visibility into the activity affecting customers today.

Making relevant information easier to access helps people answer everyday questions without unnecessary delays.

It also reduces dependence on individuals who know where information is stored or how a particular spreadsheet works.

Ask yourself:
Can the people making decisions easily access the information they need?

Step 3:
Focus on What Needs Attention

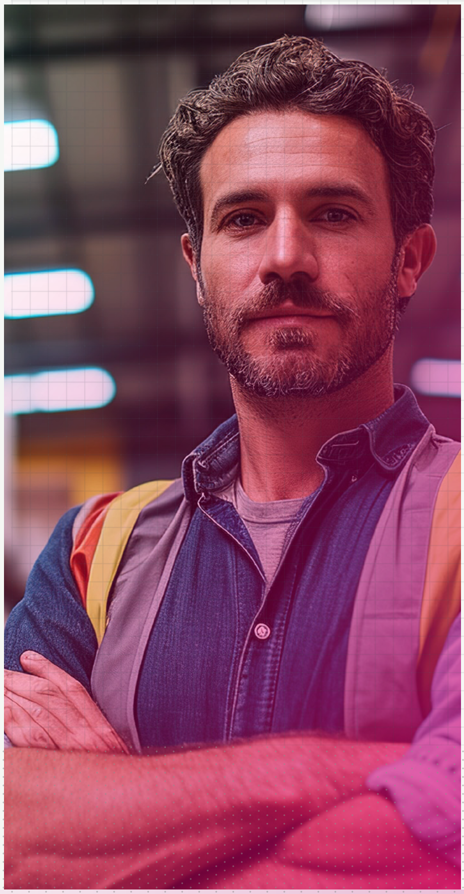
When every number, report and metric receives the same attention, the things that actually matter can be difficult to spot. Operational intelligence should help teams identify changes, exceptions and emerging issues.

This might mean noticing that margins are beginning to fall, inventory is building up, demand for a product is changing or orders are taking longer to fulfil.

Rather than repeatedly checking everything, teams can focus their attention where something has changed or where action may be required.

This is particularly valuable when people are managing busy operations and don't have time to investigate every measure every day.

Ask yourself:
Does your information show you what needs attention, or simply give you more to look at?



Step 4:
Understand What the Data is Telling You

Identifying a change is only the beginning. If margins fall, knowing the percentage tells you what happened. It doesn't necessarily tell you why.

To make an informed decision, teams need to understand what is driving the change.

+ Is the change affecting particular products, customers or locations?
+ Have supplier costs increased?
+ Has the sales mix changed?
+ Is discounting affecting profitability?

The same principle applies elsewhere.

If inventory is increasing, is demand slowing or has the business deliberately increased stock to protect availability? If fulfilment performance changes, is the problem occurring across the business or within a particular location or process?

Understanding the context behind the number helps teams avoid reacting to the wrong thing.

Ask yourself:
When an important measure changes, can you understand what's driving it?

Step 5:
Turn Insight into Action

Information only creates value when it helps someone decide what to do. Once teams can see what's happening and understand why, the next step is turning that insight into action.

This could mean adjusting purchasing because demand is changing, reviewing pricing where margins are under pressure, moving inventory between locations, addressing an operational bottleneck or contacting customers whose buying behaviour has changed.

The action itself will depend on the situation, but what matters is creating a clear link between what the business can see and what it does next.

And once action has been taken, teams should be able to see whether it delivered the intended result.

This creates a simple cycle:

1. See What's happening
2. Understand Why
3. Decide What to do
4. Measure the outcome

Ask yourself: Does your operational information regularly lead to clear action?

Turn Outdated Reporting into Better Decision-making

Traditional reporting remains an important part of understanding business performance. But businesses increasingly need more than a retrospective view of what happened last week, last month or last quarter.

Greater operational visibility helps teams understand what's happening now, identify where attention is needed and investigate the reasons behind change.

This can support better decisions across many of the areas we've explored throughout Weather the Storm:

+ Protecting margins.
+ Improving operational efficiency.
+ Controlling costs.
+ Managing inventory and supply.
+ Responding to changing customer demand.

Whatever the challenge, greater control starts with understanding what's happening and knowing where to act.

Your Operational Intelligence Health Check

How effectively is your business turning operational information into action?

Consider whether you can answer Yes to the following:

+ Can you connect information from different areas of the business when making important decisions?
+ Can teams easily access the information relevant to their roles?
+ Can you quickly identify changes or issues that need attention?
+ Can you investigate what's driving a change in performance?
+ Can you see whether the actions you've taken have delivered the intended result?

If the answer to any of these is **No** or **Not always**, this is a perfect opportunity to improve the way operational information supports decision-making across your business.

See What's Happening and Know What to Do Next.

Better decisions come from making relevant information easier to see, understand and act on.

By connecting operational information across the business, teams can spend less time gathering and checking data and more time understanding what it means, identifying what needs attention and deciding what to do next.

Ready to Make More Confident Decisions?

Discover how greater operational visibility can help your teams turn everyday business data into clearer insight and more informed action.

Book a demo today.