Analytics | Contractor Scorecard

Content

1   General

The Contractor Scorecard is a performance evaluation tool that measures the cooperation with ALDI SOUTH with the ServiceChannel platform over the last 365 days (although the period can also be adjusted). Reliability, punctuality, quality and service costs are assessed against KPIs for repairs and planned maintenance. Data can be filtered according to other criteria.

The contractor scorecard can be found on the top right side of the ServiceChannel home page.
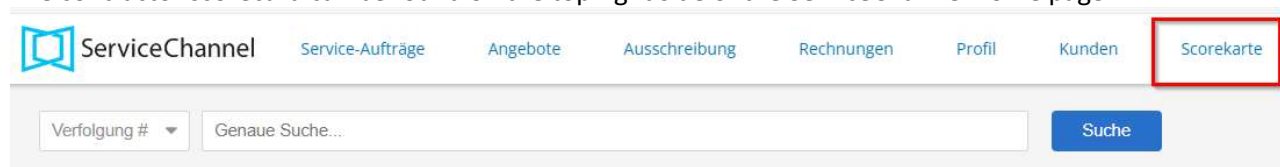
2   Reports in the scorecard

The scorecard contains six different reports that can be switched between. Set Filters are retained when changing.

The following 6 sections offer different viewing options:

- **Summary**: ServiceChannel Analytics

  Displays a performance summary for repair and maintenance work, and also provides a clear graphical representation of service order volume and average invoice amount, location feedback, spend by priority, and check-in sources.

- **Repair KPIs**: ServiceChannel Analytics

  Displays the score and grade for repair KPIs, as well as a 12-month trend for key performance indicators.

- **Repair KPI Comparison:** ServiceChannel Analytics

  Only relevant for you if you serve other customers with SC in addition to ALDI SOUTH.
- **Wartung KPIs**: ServiceChannel Analytics

  Displays the score and grade for maintenance KPIs, as well as a 12-month trend for key performance indicators.
- **Maintenance KPIs Comparison:** ServiceChannel Analytics

  Only relevant for you if you serve other customers with SC in addition to ALDI SOUTH.
- **Operational Metrics**: ServiceChannel Analytics

  Displays operational metrics grouped by service order status and allows comparison between any two date ranges of the last 365 days.

3   Calculation of the KPI score

Each section can be rated in the form of a letter, which is calculated on the basis of percentage points achieved.
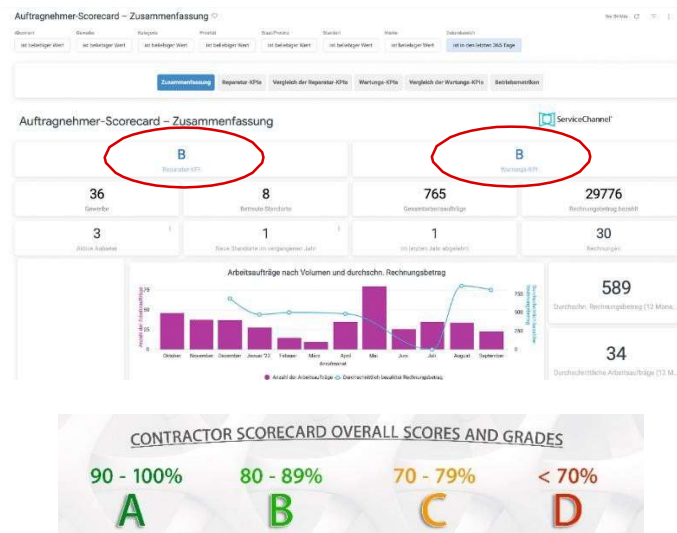
The sum of all percentage KPI ratings results in an overall rating divided into repair and Maintenance: **Overall Rating =   Sum of all KPI scores / Total number of eligible KPIs**

3.1   Filtering the scorecard

At the top of the scorecard are filters that make it possible to filter out relevant data. In some cases, these filters are preset to show the most recent data within a limited period of time. The data can be filtered to show the information you need without affecting other users.

If you serve other customers in addition to ALDI SOUTH, such as HOFER KG, with ServiceChannel, the Filter "Subscriber" can be an important one, as it allows you to separate the data of the customers.

Include criteria:
1. Select Equals, Contains, Starts With, or Ends With.

2. Start by entering the criteria in the drop-down list.

3. Select the desired criterion from the drop-down list once it has been found.

4. Several criteria from the selection list can be selected.

Exclusion of criteria:
1. Select "is not the same," "does not contain," "does not start with," or "does not end with."

Applying the filters:
1. After selecting all criteria, click on "Update" in the upper right corner.

2. The dashboard report is updated with the selected criteria.

3. Tip: If errors loaded, refresh the page again
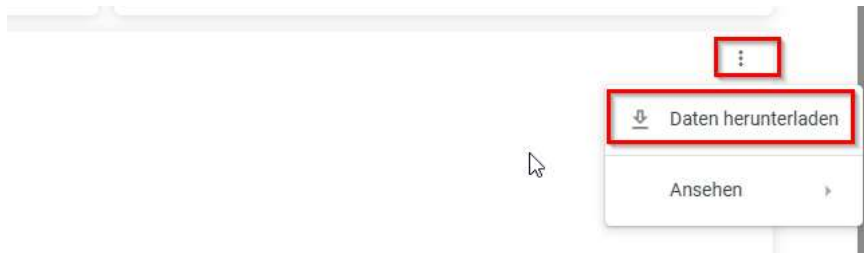

The filters are reset to the default value when the page is reloaded.
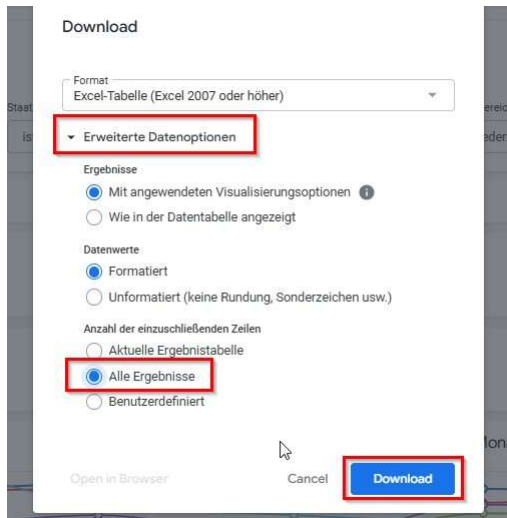
3.2   Export data

There is an option to download data.

Download data:

1. For the desired evaluation, select the three dots and "Download data".

2. Expand advanced data options and select "All results"

3.3 Key Performance Indicators (KPIs) for Repair Orders

A matrix of repair KPIs and the overall performance of service providers over the last **90 days**, **180 days**, **365 days**, or a **custom date range** below 365 days.

There are 6 repair KPIs:

- **Order confirmation**: the percentage of service orders - with an EAZ of up to 48 hours or less - that have been responded to in a timely manner*.

  For P1 (24h) orders, prompt means a reaction (order acceptance) within 4 hours. For P2 (48h) orders, a response (order acceptance) within 8 hours

- **Check-in compliance**: The percentage of completed service orders that have both a check-in and a check-out entry.

- **On-time Arrival Date Date**: the percentage of service orders for which the Service Provider was on-site before the original date/time generated by the system.

- **On-time arrival - updated EAZ:** the percentage of on-time arrival for service orders with an updated date.

- **First-time completion**: the percentage of service orders completed on the first visit with only one check-in and one check-out on the same day (or within 24 hours for night orders).

- **Invoice Submission (within 30 days):** the percentage of service orders for which the invoice is received within 30 days of the order being marked as "completed / ..." was submitted.

In short, each KPI has a calculated **score** that indicates the percentage of work orders that meet the criteria for that KPI:

Individual KPI score (%) = $\dfrac{\textbf{Number of compliant service orders}}{\textbf{Total number of service orders}}$

(rounded to the next highest integer)

The sum of all KPI scores results in an **overall rating**:

Overall assessment = $\dfrac{\textbf{Sum of all KPI scores}}{\textbf{Total number of eligible KPIs}}$

The overall score is then converted into a grade that represents the overall performance.

CONTRACTOR SCORECARD OVERALL SCORES AND GRADES

| 90 - 100% | 80 - 89% | 70 - 79% | < 70% |
| A | B | C | D |

3.4 Maintenance Performance Counters

A matrix of maintenance KPIs is mapped out, as well as total performance over the last **90 days, 180 days, 365 days**, or a **custom date range** below 365 days.

There are 3 KPIs for maintenance:

- **Check-in compliance**: The percentage of completed service orders that have both a check-in and a check-out entry.

- **Appointment Entry Confirmation**: The percentage of work orders where the scheduled date has been updated by you to indicate when the work will be performed (applies only to planned maintenance work orders that are created in bulk and have an expiration date)

- **Scheduled Service Orders Completed**: The percentage of service orders completed before the expiration date.

Each KPI has a calculated **score** that indicates the percentage of service orders that meet the criteria for that KPI:

Individual KPI score (%) = $\dfrac{\textbf{Number of compliant service orders}}{\textbf{Total number of service orders}}$

(rounded to the nearest whole number)

In other words, ***for how many of the service orders assigned to the service provider did the service provider exhibit "positive" behavior*** (e.g., checking in and out, or completing maintenance orders before the expiration date).

3.5 Contractor Scorecard Operational Metrics

The Operational Metrics tab allows you to compare the **metrics for open/incomplete, completed, and billed service orders** of a specified period of time over two time periods.

The date range can be filtered to show the operational metrics for a specific time period by using the Previous Period and Current Period filters.

Metriken für sich in Bearbeitung befindliche Arbeitsaufträge	Metriken für abgeschlossene Arbeitsaufträge	Metriken für in Rechnung gestellte Arbeitsaufträge
Dispatch To On Site (days) 9.12 ↓-5.22 3.90	**Arbeitsaufträge abgeschlossen** 19.047 ↓-9.218 9.829	**Fakturierte Arbeitsaufträge** 8.758 ↓-4.800 3.958
Offen bis Versandbestätigung (Tage) 5.24 ↓-3.08 2.15	**Durchschnittliche Zeit vor Ort (Stunden)** 1.61 ↓-0.14 1.47	**Durchschnittlicher-Rechnungsbetrag** 377 ↓-33 345
Arbeitsaufträge mit ETA-Änderung 10% ↑1% 11%	**Durchschn. Res.-Zeit ohne Angebote (Tage)** 9.94 ↓-5.41 4.52	**Durchschnittliche Zeit zum Senden der Rechnung (Tage)** 7.97 ↓-2.71 5.26
Arbeitsaufträge zurückgerufen 5 ↑3 8	**Durchschn. Res. mit Angeboten (Tage)** 12.99 ↓-6.30 6.69	**Genehmigter Rechnungsprozentsatz** 95% ↓-8% 87%
	Durchschn. Angebotsbearbeitungszeit (Tage) 4.31 ↓-2.29 2.02	**Durchschnittliche Zeit bis zur Genehmigung der Rechnung (Tage)** 1.83 ↓-1.03 0.80

- Metrics with **green trend arrows** indicate a **positive trend**, whether up or down.

  - For example, the **ship-to-site trend is** positive when the benchmark is _decreasing_, while the average **on-site time** is negative when the metric is _increasing_.

- Metrics with **red trend arrows** indicates a **negative trend**, whether up or down.

  - For example, the **average processing time with quotation is negative** when the numbers _increase, while the average invoice amount_ is negative when the numbers decrease. values.

By clicking on the name of each metric, it can be broken down to reveal the corresponding tracking numbers. When the value of a measure is broken down, the list of service orders that belong to this measure appears. When you drill down into the associated visualization, the data is listed.