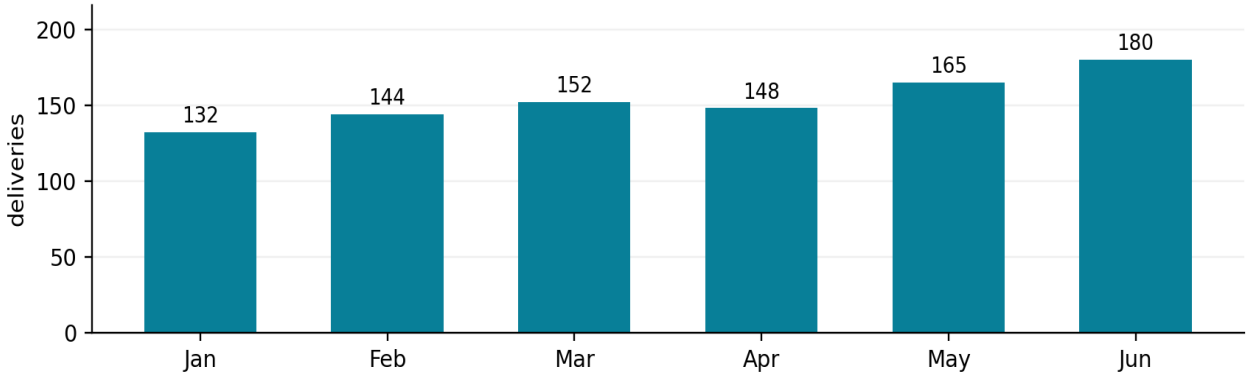
Management overview

Review

Management readout | May-June comparison with January-June context | Synthetic sample, not a customer result.

What the evidence says

Revenue is above the illustrative target and workload increases. Delivery reliability is below its example target, so growth should be reviewed alongside service performance and collections.



Completed deliveries - historical context

Measure	May / comparison	June / actual	Movement
Revenue	Target EUR 82,000	Actual EUR 83,517	+1.9% vs target
On-time deliveries	93.9%	93.3%	-0.61 pp vs May
Tickets closed	Target 85	Actual 89	+4 vs target
Open backlog	Limit 20	Actual 16	Within illustrative limit

Changes are descriptive. Proposed actions below require the specified source checks before implementation.

Findings & supporting evidence

Service performance weakens slightly

Completed deliveries rise from 165 to 180, while on-time completions rise from 155 to 168. Reliability falls from 93.9% to 93.3%. Late deliveries rise from 10 to 12. This does not prove rising volume caused delays.

Targets are illustrative, not benchmarks

The 95% reliability target, 85 closed-ticket target and backlog limit of 20 come from the synthetic sample. They are not industry standards. At June volume, 171 on-time deliveries would meet 95%; actual is 168.

A scorecard needs supporting detail

Revenue, gross margin and operating profit reconcile to the sales and finance reports. Receivables, inventory and workload use distinct units and do not combine into one overall performance score.

Supporting calculations / breakdown

June operating check	Actual	Basis
Deliveries completed	180	Includes 168 on time and 12 late
Delivery target gap	3 deliveries	171 on time needed for 95% of 180
Operating profit	EUR 7,165	Same finance basis as detailed report
Receivables	EUR 36,500	Ageing exposure; not cash available
Stock value	EUR 184,200	Valuation, not stock quantity

Reported figures are rounded for display; calculations use the underlying synthetic values. Definitions and source limits are stated on page 3.

Actions, definitions & limits

Proposed action register

Suggested owner	Investigation / action	Evidence needed to close
Operations	Review late deliveries by promised-date rule and exception reason.	Service gap explained from delivery-level evidence.
Finance	Review overdue receivables separately from profit.	Collection exposure and payment allocations reconciled.
Management	Agree owners and definitions for scorecard exceptions.	Each action has evidence, an owner and a next review date.

Owners are suggested roles, not assigned people. Set a review date when the scope is agreed; these samples do not assert that any action has been completed.

Calculation definitions

On-time rate = on-time / completed deliveries. Target gap = 171 - 168 on-time deliveries at June volume. Currency, rates and counts are kept separate.

Source and checks

ReTriev dashboard sample data: related sales, finance and operating datasets

The six monthly periods are present and numeric. KPI totals and ratios are recomputed from the supplied sample inputs. These checks do not establish transaction completeness, correct real-world accounting policy or causal validity.

Evidence limitations

The source does not include historical backlog, delay causes or a delivery-level log. No backlog improvement or capacity cause can be inferred. Targets apply only to this example.

This sample illustrates an expanded written Review. Brief package findings and the included minor-adjustment review round are distinct; confirm deliverable coverage in the written scope.