

# **Sales proposal: weekly shop dashboards, Fenwick & Dale Stores**

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# Weekly Shop Dashboards and Head-Office Comparison View

## Cover Page

**Prepared for:** Fenwick & Dale Stores

**Prepared by:** Larkfield Analytics Ltd

**Proposal purpose:** Sales proposal for weekly shop dashboards, a head-office comparison view, and supplier-owned connections to till, stock and loyalty systems.

### WORKED-EXAMPLE NOTICE:

Fenwick & Dale Stores and Larkfield Analytics Ltd are fictional, and this proposal is a worked example.

**Proposal validity:** 60 days from the date of issue.

**First-year investment:** £55,240 excluding VAT.

**Delivery commitment:** The first dashboards will be in shop managers' hands within 14 weeks of contract start.

## Executive Summary

Fenwick & Dale Stores needs a practical way to help its nine shops manage availability and enable head office to compare performance across the estate. Today, shop managers order stock from their own spreadsheets, while head office receives sales totals only once a month. Till, stock and loyalty-card data sit in separate systems that do not communicate with one another.

The immediate consequence is limited visibility of what sold, what ran out and what is on order at shop level. Fenwick & Dale's finance team estimates that out-of-stock lines cost between 5% and 7% of weekly sales in its three busiest shops. This is Fenwick & Dale's own untested estimate, but it indicates the potential value of faster, more consistent availability insight.

We will connect the till, stock and loyalty systems into one reporting store and own the data connections so Fenwick & Dale's two-person IT team does not need to maintain them. We will deliver a weekly dashboard for each shop manager and a single head-office comparison view across all nine shops. The dashboards will provide the requested visibility of sales, stock-outs and stock on order, with daily dashboard refreshes supported by the reporting platform.

Our approach begins with a two-week discovery phase, followed by connection design, dashboard build, testing, training and launch. Delivery will run through fortnightly sprints, with written progress reporting and a risk register reviewed at each steering meeting. We will place the first dashboards in shop managers' hands within 14 weeks of contract start.

The first-year investment is **£55,240 excluding VAT**, including implementation, dashboard development, data-engineering delivery, and 12 months of hosting and dashboard-platform licence for up to 40 named users. This sits within Fenwick & Dale's stated first-year budget of £45,000 to £65,000 excluding VAT, including hosting.

Acceptance will be straightforward: we will demonstrate each deliverable to Fenwick & Dale's nominated approver. Fenwick & Dale may confirm acceptance in writing against criteria agreed during discovery, or provide a written list of material issues for correction.

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## Understanding Your Needs

### The current challenge

Fenwick & Dale operates nine shops, yet the information required to manage stock availability is fragmented. Shop managers currently use their own spreadsheets to order stock, and head office sees sales totals only monthly. This makes it difficult to identify quickly:

- Which products sold in each shop;
- Which lines ran out;
- What stock is already on order; and
- Which shops and product lines have the greatest availability issues.

The underlying challenge is not simply reporting frequency. Till, stock and loyalty-card data are held in three separate systems that do not talk to one another. Fenwick & Dale needs a supplier that can take ownership of the data connections, relieving pressure on its two-person IT team while creating a consistent reporting foundation.

### The cost of delayed action

Fenwick & Dale's finance team estimates that out-of-stock lines cost approximately 5% to 7% of weekly sales in its three busiest shops. This is the buyer's own untested estimate, not a validated loss calculation. Even so, it highlights the operational importance of giving managers timely visibility of sales, stock-outs and stock on order, and enabling head office to compare the nine shops consistently.

## Requirements response

| Buyer requirement                                                                      | Our response                                                                                                           | Status   |
|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|----------|
| A weekly dashboard for each shop manager.                                              | We will provide one dashboard for each shop manager, supported by daily dashboard refreshes.                           | Included |
| Each shop dashboard must show what sold, what ran out and what is on order.            | We will configure the shop dashboards to present sales, stock-outs and stock on order from the connected data sources. | Included |
| One head-office view comparing the nine shops.                                         | We will provide a head-office comparison dashboard covering all nine shops.                                            | Included |
| Connections to till, stock and loyalty-card data held in three separate systems.       | We will connect the three systems into one reporting store using the available standard export or interface.           | Included |
| The supplier must own the data connections so the two-person IT team does not have to. | Larkfield will own the data connections for the service.                                                               | Included |
| First dashboards in shop managers' hands before the spring season starts in 14 weeks.  | We will place the first dashboards in shop managers' hands within 14 weeks of contract start.                          | Included |

## Proposed Solution

### Outcome-focused dashboard service

We will create a single reporting foundation from Fenwick & Dale's till, stock and loyalty-card systems, then use it to deliver two connected dashboard experiences:

- **Shop-manager dashboards:** a weekly view for each of the nine shops, showing what sold, what ran out and what is on order.
- **Head-office comparison view:** one dashboard enabling head office to compare the nine shops.

This solution is designed to replace fragmented, spreadsheet-led visibility with a consistent view of the information Fenwick & Dale needs to manage availability and compare shop performance.

### Key benefits

- **Earlier operational visibility:** shop managers receive weekly dashboards, with daily dashboard refreshes, rather than relying solely on locally maintained spreadsheets.
- **Comparable management information:** head office can review the same dashboard foundation across all nine shops rather than waiting for monthly sales totals alone.

- **Connected data:** till, stock and loyalty data are brought into one reporting store in a common layout agreed during discovery.
- **Reduced IT maintenance burden:** Larkfield owns the data connections, as requested.
- **Practical launch support:** dashboard walkthroughs and manager training support adoption at launch.

## Data connection and reporting method

We will connect to each client system through its standard export or interface, using a scheduled file export, database view or API as available. Where a system has no standard export or interface, we will build a read-only export during discovery at no extra charge.

All sources will be loaded into a reporting store in a common layout agreed during discovery. We will document this layout in a data dictionary that Fenwick & Dale keeps. The resulting dashboards will refresh daily and will be available through a browser-based platform with named-user access.

## Data protection, access and quality assurance

Before any personal data moves, we will complete a two-week discovery phase that includes a data inventory and a written data protection impact assessment for Fenwick & Dale's sign-off. We host client data in a UK data centre, encrypted at rest and in transit, with named-user access and quarterly access review.

We collect and retain only the personal data required for the agreed project purpose. If we confirm a personal-data breach, we will notify Fenwick & Dale within 24 hours, stating what we know at that time, including what happened, which data is affected and what action we are taking.

Dashboards are built to WCAG 2.2 level AA and tested against that standard before launch and at each major release. We record accessibility defects identified through testing and fix them before a dashboard goes live.

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## Implementation Approach

### Phase 1: Discovery and mobilisation

We will begin with a two-week discovery phase. This will establish the operational questions the dashboards must answer, confirm the available till, stock and loyalty data, agree the reporting-store layout, and document the data dictionary.

Discovery will include stakeholder interviews, a data inventory and a written data protection impact assessment. Fenwick & Dale will sign off the impact assessment before any personal data moves.

## Phase 2: Data connection and reporting–store build

Our Lead Data Engineer will establish the data connections to the till, stock and loyalty systems and create the common reporting-store layout. Larkfield will own the data connections throughout the service. We will work with the system access that Fenwick & Dale has offered and use the agreed connection method for each source.

## Phase 3: Dashboard design and development

Our Dashboard Developer will build the shop-manager dashboards and the head-office comparison view. The design will focus first on the buyer's requested information: sales, stock-outs and stock on order at shop level, and comparison across all nine shops for head office.

We will demonstrate deliverables to Fenwick & Dale's nominated approver as they are completed. This allows the project team to confirm that the dashboards reflect the agreed discovery criteria before launch.

## Phase 4: Testing, training and launch

We will test dashboards against WCAG 2.2 level AA before launch. We will provide a recorded walkthrough of every dashboard and conduct the first of two half-day training sessions for service managers at launch. The second half-day training session will take place at month six.

Delivery will follow fortnightly sprints. We will provide a written progress report and maintain a risk register reviewed at every steering meeting. Escalations will be managed through Imogen Farrow, Engagement Director, and then Larkfield's managing director if required.

## Timeline & Milestones

The implementation plan is structured to place the first dashboards in shop managers' hands within 14 weeks of contract start.

| Timing      | Milestone                         | Key output                                                                                                                                                                           |
|-------------|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Weeks 1-2   | Discovery and mobilisation        | Stakeholder interviews, data inventory, agreed reporting-store layout, data dictionary and written data protection impact assessment for client sign-off before personal data moves. |
| Weeks 3-6   | Data connection build             | Connections to till, stock and loyalty systems; common reporting-store foundation.                                                                                                   |
| Weeks 7-10  | Dashboard development             | Shop-manager dashboard design and head-office comparison view development.                                                                                                           |
| Weeks 11-12 | Testing and review                | Dashboard demonstration, accessibility testing against WCAG 2.2 level AA, and correction of identified accessibility defects before go-live.                                         |
| Weeks 13-14 | Launch and first manager training | First dashboards in shop managers' hands, recorded dashboard walkthroughs and half-day service-manager training session.                                                             |

| Timing  | Milestone          | Key output                                             |
|---------|--------------------|--------------------------------------------------------|
| Month 6 | Follow-up training | Second half-day training session for service managers. |

Fenwick & Dale has indicated that its Head of Retail Operations can provide a half-day each week and that access to all three systems will be available. We will use this availability to maintain decision-making pace through discovery, connection work and dashboard review.

## Investment

The following first-year investment is based solely on Larkfield Analytics' standard rates and includes 12 months of hosting and dashboard-platform licence for up to 40 named users. All amounts exclude VAT.

| Component                                                                 | Basis     | Rate             | Amount         |
|---------------------------------------------------------------------------|-----------|------------------|----------------|
| Engagement direction, discovery, governance and acceptance management     | 8 days    | £1,150 per day   | £9,200         |
| Data connection and reporting-store delivery                              | 16 days   | £950 per day     | £15,200        |
| Dashboard design, development, testing, walkthroughs and training support | 18 days   | £780 per day     | £14,040        |
| Hosting and dashboard-platform licence for up to 40 named users           | 12 months | £1,400 per month | £16,800        |
| <b>Total first-year investment excluding VAT</b>                          |           |                  | <b>£55,240</b> |

The total falls within Fenwick & Dale's stated first-year budget range of £45,000 to £65,000 excluding VAT, including hosting.

Rates are fixed for the whole term of the contract, including any extension. No expenses will be charged unless Fenwick & Dale agrees them in writing in advance. Any agreed travel and out-of-pocket costs will be charged at cost.

**Payment terms:** invoiced monthly in arrears and payable within 30 days.

## Why Choose Us

Larkfield Analytics combines data engineering and decision-dashboard capability within one delivery team. This is directly relevant to Fenwick & Dale's requirement to connect separate operational systems and turn the resulting data into usable management information.

- **Relevant retail delivery:** Larkfield has delivered sales dashboards for an eleven-shop regional retailer, connecting till, stock and loyalty data and providing a weekly dashboard for each shop manager.

- **Supplier-owned connections:** our data-engineering practice connects client systems into a reporting store and will own the data connections for this service.
- **Structured, transparent delivery:** fortnightly sprints, written progress reports and a risk register reviewed at each steering meeting provide a clear delivery rhythm.
- **Accessible dashboard practice:** dashboards are built and tested against WCAG 2.2 level AA before launch and at major releases.
- **Clear accountability:** Imogen Farrow will lead the engagement, sign off reports, and provide the named first escalation route.
- **Assurance:** Larkfield is a registered data controller and processor, holds the Clearfield Data Practice assurance mark, and maintains public liability insurance of £5 million and professional indemnity insurance of £2 million.

## Case Studies

### WORKED-EXAMPLE NOTICE:

The organisations, projects, people, results and references in this section are fictional and are included as part of this worked example.

### Hollin & Rye Stores: weekly sales dashboards for eleven shops

In 2025, Larkfield connected till, stock and loyalty data for Hollin & Rye Stores, a regional retailer with eleven shops, and delivered a weekly dashboard for each shop manager. Stock-outs reported by shop managers fell from an average of 14 per shop per month to 6 within four months. The contract value was £58,000.

**Reference:** Perrin Hale, Operations Manager, [perrin.hale@hollinrye.example](mailto:perrin.hale@hollinrye.example), 01000 555 0104.

### Ardmoor Borough Council: three data sources joined into one management dashboard

From 2023 to 2024, Larkfield joined three complaints and compliments data sources into one dashboard for 14 service managers. The median time to produce the quarterly complaints report fell from 11 working days to 3. The £148,000 contract was delivered on time.

**Reference:** Elspeth Rowan, Head of Corporate Performance, [elspeth.rowan@ardmoor-council.example](mailto:elspeth.rowan@ardmoor-council.example), 01000 555 0102.

### Tavistone Housing Association: rapid dashboard delivery

In 2024, Larkfield redesigned an annual tenant survey around required measures and built a quarterly dashboard for the board. The first quarterly dashboard reached the board six weeks after contract start. The contract value was £96,500.

**Reference:** Maren Ostby, Director of Operations, [maren.ostby@tavistone-housing.example](mailto:maren.ostby@tavistone-housing.example), 01000 555 0103.

## Team

| Team member   | Role on this engagement | Relevant experience and responsibility                                                                                                                            |
|---------------|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Imogen Farrow | Engagement Director     | 16 years in public-sector research. Leads every contract and signs off every report. Imogen will lead the engagement and act as the named first escalation route. |
| Dev Okonkwo   | Lead Data Engineer      | 11 years building reporting stores. Dev will lead data connection and reporting-store work and owns data protection impact assessments for Larkfield projects.    |
| Tomasz Wren   | Dashboard Developer     | 7 years building dashboards. Tomasz will develop the dashboards and owns accessibility testing against WCAG 2.2 level AA.                                         |

## Terms & Conditions

### Commercial terms

- All prices are excluding VAT.
- The first-year investment is £55,240 excluding VAT.
- Invoices will be issued monthly in arrears and are payable within 30 days.
- Standard rates are fixed for the whole term of the contract, including any extension.
- No expenses will be charged without Fenwick & Dale's prior written agreement. Agreed travel and out-of-pocket costs will be charged at cost.
- This proposal remains valid for 60 days from the date of issue.

### Acceptance

At each delivery stage, Larkfield will demonstrate the relevant deliverable to Fenwick & Dale's nominated approver. Acceptance criteria will be agreed during discovery. Fenwick & Dale will then either:

1. confirm acceptance in writing against the agreed criteria; or
2. provide a written list of material issues for Larkfield to correct.

Larkfield will address material issues identified through this mechanism and re-demonstrate the relevant deliverable for acceptance.

## Data handling and security

- A written data protection impact assessment will be completed during discovery and signed off by Fenwick & Dale before any personal data moves.
- Client data will be hosted in a UK data centre, encrypted at rest and in transit.
- Access will be managed through named-user access, with quarterly access review.
- Larkfield will notify Fenwick & Dale of a confirmed personal-data breach within 24 hours of confirmation.
- Larkfield will collect and retain only the personal data needed for the agreed project purpose.

## Governing law

This proposal and any resulting contract are governed by the law of England and Wales. Disputes will be referred to the courts of England and Wales.

## Declarations

Larkfield declares that it has not colluded with any other bidder, offers no gift or inducement to any officer of Fenwick & Dale, accepts the buyer's standard terms and conditions, and lists no clarifications. Larkfield holds a current tax clearance certificate and will make its modern slavery statement available on request. These declarations are signed for Larkfield by Imogen Farrow, Engagement Director.

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## Next Steps

We welcome the opportunity to help Fenwick & Dale establish timely, connected visibility of sales, stock-outs and stock on order across its nine shops.

To proceed, Fenwick & Dale should provide written acceptance of this proposal within its 60-day validity period. Following acceptance, we will arrange a kickoff meeting and begin the two-week discovery phase. At kickoff, we will confirm the nominated approver, stakeholder attendance, system-access arrangements and the delivery calendar needed to place the first dashboards in shop managers' hands within 14 weeks of contract start.

**Call to action:** Please confirm written acceptance to authorise mobilisation and secure the 14-week dashboard delivery plan.

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## References

1. [brief-fenwick-dale.md](#)
2. [Company.txt](#)
3. [Services.txt](#)

4. Delivery team (all invented).txt
5. Past performance (all invented).txt
6. Standard rates (invented, excluding VAT).txt
7. Implementation approach and training.txt
8. Method and assurance.txt
9. Forms and declarations (invented).txt