CASE STUDY: FROM WEEKLY SPREADSHEETS TO A LIVE SHOP FLOOR PLAN-VS-ACTUAL DASHBOARD

CLEAR TARGETS. FASTER CORRECTIONS. ONE NUMBER EVERYONE TRUSTS.

At a glance

A manufacturer tracked production against forecast with a manually built weekly spreadsheet, so shop floor teams often didn't know where a product line stood until days after the fact. True Blue Technologies built a Tableau dashboard that refreshes automatically from the ERP every morning and displays actual-versus-forecast performance, by product, directly on the shop floor.

KEY METRICS

DAILY REFRESH REPLACES WEEKLY MANUAL REPORT

SAME-DAY VISIBILITY INTO EVERY PRODUCT LINE

RED / YELLOW / GREEN STATUS AT A GLANCE

ONE SHARED NUMBER ACROSS EVERY SHIFT AND PLANT

TrueBlueTechnologies

- Sales Operations Redefined
- www.truebluetechnologies.com
- Indianapolis, IN

CHALLENGES

- **Lagging visibility:** Actual-versus-forecast performance lived in a spreadsheet that was manually assembled once a week, so the shop floor was often reacting to problems days after they started.
- **No shared standard for "on track":** Whether a product line was ahead of or behind plan came down to a supervisor's judgment call rather than a consistent threshold.
- **Disconnected systems:** Actual production data lived in the ERP, forecasts lived in a separate submission process, and nothing brought the two together where the floor could see them.
- **Conflicting numbers across shifts:** Different shifts and plants worked from different versions of the report, leading to debates about whose numbers were right instead of what to do next.

SOLUTION

- True Blue built an automated Tableau dashboard that pulls actual invoiced units and dollars directly from the ERP and compares them against the submitted forecast, month to date and year to date.
- Automatic color-coded status thresholds (red under 75% of forecast, yellow 75–99%, green at or above 100%) so a line's status is obvious without interpretation.
- Product-level detail rolls up to plant and grand totals, with variance shown in both units and dollars so a small percentage gap on a large product doesn't get lost.
- Refreshed every morning and displayed on shop floor screens, tied to the production calendar so everyone can see exactly how many production days have elapsed in the period.

Selected Period **2026 P09 — Aug** | Plant Name **All** | As Of Date **8/21/2026**

2026 P09 — Aug | Day 15 of 20 — Showing through 2026-08-21 — **Red** <75% **Yellow** >=75% and <100% **Green** >=100%

MTD by Product

Row	Report Product	Act Units As Of	Fcst Units Full Pd	Fcst Units El.	Diff. Units	Act $ As Of	Fcst $ Full Pd	Fcst $ Elapsed	Pct of Fcst $	Difference $
Kit	PROD 01 – KIT A	2	2	2	0		$5,200	$0	0.0%	($5,200)
Kit	PROD 02 – KIT B	30	48	36	-6	$512,000	$650,000	$487,500	105.0%	$24,500
Kit	PROD 03 – KIT C	245	440	330	-85	$340,000	$610,000	$457,500	74.3%	($117,500)
Kit	PROD 04 – KIT D	285	690	518	-233	$68,500	$73,000	$54,750	125.1%	$13,750
Kit	PROD 05 – KIT E	7	54	40	-33	$8,800	$55,000	$41,250	21.3%	($32,450)
Kit	PROD 06 – KIT F	490	630	472	+18	$415,000	$420,000	$315,000	131.7%	$100,000
Kit	PROD 07 – KIT G	12	14	11	+1	$25,500	$48,500	$36,375	70.1%	($10,875)
Kit	PROD 08 – KIT H	45	54	40	+5	$138,000	$139,500	$104,625	131.9%	$33,375
Kit	PROD 09 – KIT I	72	108	81	-9	$139,000	$219,000	$164,250	84.6%	($25,250)
Kit	PROD 10 – KIT J	29	34	26	+3	$145,000	$129,500	$97,125	149.3%	$47,875
Kit	**Total**	**1,180**	**1,940**	**1,455**	**-275**	**$1,742,900**	**$2,398,000**	**$1,798,500**	**96.9%**	**($55,600)**
Parts	Parts & Service	0		0	0	$1,048,000	$1,631,000	$1,223,250	85.7%	($175,250)
	Grand Total	**1,180**	**1,940**	**1,455**	**-275**	**$2,790,900**	**$4,029,000**	**$3,021,750**	**92.4%**	**($230,850)**

YTD by Product

Row Class	Report Product	Act Units YTD	Fcst Units YTD	Pct of Fcst Units YTD	Diff. Units YTD	Fcst Units Full Yr	Act $ YTD	Fcst $ YTD	Pct of Fcst $ YTD
Kit	Product A	14	19	73.7%	-5	19	$61,200	$63,900	95.8%
	Product B	421	388	108.5%	33	399	$6,910,300	$7,041,600	98.1%
	Product C	470	402	116.9%	68	418	$958,400	$867,300	110.5%
	Product D	4,220	3,910	107.9%	310	4,010	$6,144,900	$5,320,500	115.5%

Illustrative dashboard mockup — figures shown are for demonstration only.

BENEFITS

1 **Faster course correction**

Supervisors see which product lines are behind plan first thing in the morning instead of at month end, so they can rebalance the day's schedule while there's still time to act.

2 **One shared source of truth**

Every shift and every plant looks at the same actual-versus-forecast numbers, removing the back-and-forth over whose report is correct.

3 **Less manual reporting**

The plant no longer waits on a manually assembled spreadsheet each week, freeing analyst time for the exceptions that actually need attention.

4 **Built-in accountability**

Objective color-coded thresholds keep conversations focused on the plan and the path forward, not on who's numbers are right.