

COMMON TERMS AND REPORTS USED BY WALMART OPERATIONS MANAGERS TO MAKE DECISIONS

Following is list of common terms used by Walmart’s operations managers. These business terms make it easier for managers to communicate specifically and quickly about metrics and other business factors that are important to the decision-making process.

- **CGS or COGS** – cost of goods sold
- **Margin** – the difference between the cost of goods sold and the selling price: also known as “profit”
- **OSCA** – on-shelf customer availability

OSCA Report Example: showing OSCA Score and Lost Sales

AVAILABILITY									
On Shelf Customer Availability (OSCA) gives you visibility to items customers came to buy but could not find or did not meet their expectations.									
OSCA is like an advanced, no item movement report. It points you to items that should be on the shelf but are not selling.									
OSCA does this by creating a sales pattern for basic freight in food and consumables.									
If the item has zero sales for a period of time, the item is flagged as having an availability issue.									
Either the customer could not find it or did not want to buy it.									
<ul style="list-style-type: none"> • OSCA data updates daily • Only stores open more than 6 months will have a score • QTD is Quarter to Date based on Walmart Fiscal Year • For more detail information, please see the Availability Mobile App • Currently Only NHM sites will have OSCA store specific goal • Goal/ % met Goal: At store level, the number is OSCA Goal for the current quarter • Goal/ % met Goal: At Market and above, the number is percent of stores met goal 									
RGN	OSCA SCORE					LOST SALES			
	YESTERDAY	WTD	MTD	QTD	GOAL% MET GOAL	YESTERDAY	WTD	MTD	QTD
64	96.14%	96.39%	96.26%	96.28%	17.78%	\$196,691	\$1,049,919	\$618,161	\$12,924,278
58	95.90%	96.10%	95.95%	95.67%	5.56%	\$23,888	\$127,172	\$75,408	\$1,631,805
504	96.50%	96.89%	96.75%	96.57%	23.53%	\$15,906	\$84,006	\$49,345	\$1,073,821
507	96.00%	96.47%	96.38%	96.72%	28.57%	\$16,341	\$89,303	\$50,910	\$1,010,985
526	96.02%	96.08%	95.98%	95.86%	21.05%	\$24,028	\$133,712	\$79,226	\$1,649,536

- **Comp Sales** – year-over-year sales for stores that have been open for longer than 13 months

Comp Sales Example: showing daily, weekly, and monthly comps; include comps vs. plan

SALES						
*Non Comp locations will only show plan information below.						
*Sales data is pulled from Performance Center, updates daily. May not match reporting from Finance.						
RGN	DAILY COMP %	WTD COMP %	WTD vs. PLAN	MTD COMP %	MTD vs. PLAN	
64	8.8%	2.4%	103.4%	(4.7%)	102.7%	
58	5.7%	(0.3%)	100.6%	(8.4%)	100.2%	
504	8.3%	2.7%	106.5%	(6.7%)	106.1%	
507	20.3%	5.4%	103.0%	(4.5%)	104.0%	
526	4.3%	(1.2%)	100.8%	(7.4%)	100.1%	
528	10.5%	5.0%	107.2%	(0.9%)	97.2%	
533	19.2%	5.9%	105.2%	2.1%	109.2%	
541	4.0%	0.8%	108.6%	(6.7%)	107.1%	
542	10.7%	2.4%	101.0%	(1.6%)	102.3%	
543	10.1%	6.8%	103.9%	(1.0%)	101.4%	
561	5.5%	0.4%	103.0%	(9.0%)	102.4%	

- **Comp Units** – year-over-year growth in the number of items (or pounds) sold
- **Comp Traffic** – year-over-year growth in the number of transactions
- **Comp Units per Basket (U/B)** – year-over-year growth in the number of items in each basket
- **Comp Average Unit Retail (AUR)** – the average retail selling price of an item
- **Comp Ticket** – growth in the retail value of each transaction
- **Waste** – damaged or unsellable goods
- **YOY** – year-over-year
- **TY** – this year
- **LY** – last year
- **On-hand** – items readily available for sale
- **Out-of-stock** – items not available for sale
- **Inventory** – total goods available for sale
- **Vendor** – outside provider of goods or services (example: Mrs. Baird’s bread)

- **MTD** – month-to-date
- **YTD** – year-to-date
- **WTD** – week-to-date
- **QTD** – quarter-to-date
- **Q1-Q4** – Quarter 1 or 1st Quarter; Quarter 2 or 2nd Quarter; etc.
- **Leveraged/deleveraged** – when stores are spending more in wages than they are generating in sales, they are considered “deleveraged”

Leveraged/Deleveraged Report Example: numbers in red indicate “deleveraged” status for the store

Store	WTD Sales %	WTD Wage %	Diff	MTD Sales %	MTD Wage %	Diff
	116.1%	102.1%	-14.0%	106.7%	102.3%	-4.4%
	91.4%	94.3%	2.9%	88.5%	97.5%	9.0%
	99.3%	94.3%	-5.0%	98.5%	101.7%	3.2%
	96.8%	100.4%	3.6%	93.5%	101.9%	8.4%
	89.1%	101.0%	11.9%	88.8%	100.5%	11.7%
	110.4%	102.7%	-7.7%	107.3%	98.6%	-8.7%
	112.6%	123.2%	10.6%	110.2%	122.9%	12.7%
	107.3%	105.1%	-2.2%	105.3%	101.8%	-3.5%
	102.0%	94.7%	-7.3%	100.0%	95.8%	-4.2%
	100.0%	100.1%	0.1%	97.4%	102.0%	4.6%
	92.3%	84.7%	-7.6%	88.1%	78.0%	-10.1%
	102.1%	98.1%	-4.0%	104.7%	95.5%	-9.2%
	98.7%	102.0%	3.3%	100.6%	99.7%	-0.9%
	100.5%	105.2%	4.7%	98.7%	106.1%	7.4%
	105.4%	101.9%	-3.5%	105.9%	105.0%	-0.9%
	100.7%	99.8%	-0.9%	98.7%	99.6%	0.9%

- **Sales vs. forecast** – a comparison between forecasted sales and actual sales
- **OT** – overtime
- **Shrink** – items lost due to theft, damage, spoilage, or administrative error

Waste Report Example: showing managers data on one type of shrink

WASTE (RETAIL ONLY)				
RON	WTD TY \$	WTD % CHANGE	MTD TY \$	MTD % CHANGE
64	\$264,695	(23.4%)	\$184,706	(27.1%)
58	\$31,135	(15.4%)	\$24,097	(15.2%)
504	\$18,468	(36.9%)	\$12,092	(44.1%)
507	\$11,694	(40.5%)	\$7,934	(44.7%)
526	\$23,315	(46.9%)	\$16,564	(52.4%)
528	\$27,619	(7.1%)	\$18,997	(10.0%)
533	\$34,087	46.4%	\$23,760	38.4%
541	\$22,373	(27.6%)	\$15,424	(21.0%)
542	\$22,198	(32.1%)	\$16,029	(31.4%)
543	\$30,160	(5.3%)	\$21,993	(9.0%)
561	\$22,614	(36.3%)	\$14,912	(35.6%)
562	\$21,033	(34.6%)	\$12,906	(49.8%)

*Store Damages (Non-Fresh) include Damaged To \$0, Charitable Contributions, Throwaways, Reductions, Pets and Fabric Remnants, All financials are at Retail.

Store Markdown Reporting
GM CVP Report

- **Performance dashboards** – tools that show managers how specific areas are performing

Performance Dashboard Example: operating costs report used by managers to assess weekly and monthly wage indexes

OPERATING COSTS						
WAGES						
*Wage Data pulled from Performance Center, updates daily. May not match reporting from Finance.						
RGN	WTD TY %	WTD LY %	WAGE INDEX WTD %	MTD TY %	MTD LY %	WAGE INDEX MTD %
64	6.7%	6.6%	101.0%	7.2%	7.5%	103.6%
58	6.4%	6.6%	100.2%	7.1%	7.7%	104.6%
504	6.8%	6.8%	98.5%	7.5%	7.8%	100.9%
507	6.6%	7.0%	99.7%	7.1%	7.9%	99.7%
526	6.4%	6.1%	99.2%	7.1%	6.9%	100.7%
528	7.0%	7.9%	99.9%	8.4%	8.8%	103.1%
533	6.4%	6.6%	105.2%	6.6%	7.4%	107.1%
541	6.7%	6.7%	104.7%	7.3%	7.4%	109.1%
542	6.6%	6.3%	99.8%	7.1%	7.0%	104.7%
543	6.4%	6.3%	102.2%	7.1%	7.0%	105.4%
561	6.6%	6.4%	101.6%	7.3%	7.3%	105.1%
562	7.6%	7.1%	99.8%	8.1%	7.8%	99.6%

- **Comp Shop** – shopping competitors’ stores to ensure Walmart is offering the lowest prices in the area
- **P&L** – profit-and-loss statement (also known as the Income Statement)
- **KPI** – key performance indicator