

Common Table Co-op — “Trade”

Member-owned grocery, single store · 3,142 member-owners · Bloomington, Indiana

COMPLETED BY	Marisol Reyes, General manager
ALSO IN THE ROOM	Board finance committee, 2 June 2026
DATE	9 June 2026

1 · The decision

In one sentence, what decision does this dashboard exist to get made?

Which departments Monday morning's meeting spends its hour on, and which ones it leaves alone.

Who opens it, and when?

Me, Monday at about eight, and then it is on the screen in the room at nine with all eleven department heads. The board sees a version of it monthly.

How does that decision get made today, without it?

A sales report sorted by sales. Which means the meeting is about Produce and Grocery every single week, because they are always the biggest, and a bad week in Cheese never comes up until the quarter closes.

What should it rank by instead?

How much each department moved gross margin, in dollars. Not percent — dollars. A department can lose three points of margin and it barely matters, or lose one and it is two thousand dollars.

How many departments should be flagged in a normal week?

Two or three. And in a genuinely quiet week it should flag none and we should have a short meeting. Do not give me a top five that always finds five.

What has to sit next to every number?

Last week and the same week last year, always both. We are a grocery in a college town — half our year is students arriving and leaving, and the other half is the growing season. A single week's figure on its own is meaningless here.

Where does the explanation come from?

From whoever knows, in their own words, typed in afterwards. If nobody has offered a reason leave it blank. Do not put a generated sentence there — an explanation nobody wrote ends the conversation the meeting exists to have.

Anything you specifically do not want on it?

Nothing per person. No cashier figures, no ranking of staff, nothing that turns Monday into a scoreboard. This is a co-op and eleven department heads have to keep talking to each other afterwards.

Anything the board keeps quoting that you would like handled carefully?

The member basket. It is nearly twice a non-member basket and it gets quoted as proof that membership works. People who already do their whole shop here are the ones who join. If you print those two numbers side by side, print why they are not an argument.

Where does the data come from, and how fresh does it need to be?

The till export, posted Monday morning about six. It is a closed week — nothing about it should look live.

2 · Screens requested

SCREEN	WHAT IT IS FOR	WHAT IT MUST SHOW
The week	Departments ranked by what they did to gross margin.	Sales against both baselines, margin rate and its change in points, margin dollars, and the change in those dollars.
Departments	Eight weeks of each department, so a run gets caught that a week does not.	A weekly line, share of store, this week against the same week last year.
Members	Whether ownership is growing in share of the till, not only in headcount.	Member share against last year, sign-ups by route, and owners who have stopped shopping.

3 · Figures, and the comparison each one carries

FIGURE	MUST APPEAR AGAINST
Sales	Last week and the same week last year
Gross margin dollars	Last week
Margin rate	Last week, in percentage points
Member share of sales	Last week and the same week last year

No figure appears on this dashboard without the comparison beside it. A number with nothing to compare it against is not information, and the component that renders these will not accept one.

4 • What this must not do

- 1. No per-person or per-till figures of any kind.
- 2. No pie chart of department mix. We have eleven departments and a table already shows it.
- 3. No 'top five' that always finds five.
- 4. No invented explanations in the reason column.

Treated as binding rather than as a preference. Every item above is checked again before the tool is handed over.

CONFIRMATION

The answers above are mine and may be used to build the tool described. Common Table Co-op is a fictional business profile supplied for demonstration and testing; every figure appearing in the delivered dashboard is sample data.

SIGNED — MARISOL REYES

DATE