



SensibleAI Clustering Analysis Guide

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Overview

SensibleAI Clustering Analysis is a OneStream solution that groups operational entities into peer groups based on behavior, ranks performance within each peer group, and provides finance-native workflow that turn that ranking into a specific business action.

This guide is a technical reference for administrators, power users, and implementation partners. It describes how to set up the solution, configure clusters and workflows, and operate the workflows day-to-day.

Capabilities

Clustering Analysis provides three workflows in the utilization section of the solution. Each workflow addresses a distinct kind of business question:

- **Benchmarking:** Compare an entity's expense or revenue accounts against the top quartile of its peer group. The workflow produces defensible budget targets account by account.
- **Peer Group Analytics:** Produces a scorecard for a single entity that shows how it compares to its cluster on specific metrics. This can be used for performance reviews, coaching plans, and outlier explanation.
- **Drift Analytics:** Run clustering points in time and surface which entities moved between clusters. The workflow classifies movement as positive or negative based on the cluster performance score, and it produces narrative explanations for drift patterns.

How It Works

Every workflow uses the same three-step framework:

- **Cluster:** Group entities by operational behavior using a configurable set of features. The platform selects the appropriate clustering model based on data type and shape, applies feature scaling and encoding automatically, and surfaces interpretability information for each resulting cluster.
- **Rank:** Score every entity within each cluster against a configurable Performance Score. The Performance Score is built from measures that matter to the use case, such as cost efficiency, pipeline health, or customer value.
- **Action:** Execute a workflow that turns the cluster, ranking, and score into a deliverable: a peer-grounded budget plan, an entity scorecard, or a drift insight with a recommended next play.

Audience for This Guide

- OneStream administrators responsible for deploying Clustering Analysis in a customer environment.
- Power users who configure clusters and workflows for specific business use cases.
- Functional leads who consume workflow outputs and need to understand the underlying mechanics.
- Implementation partners scoping engagements that include Clustering Analysis.

Setup and Installation

Clustering Analysis is delivered as part of the SensibleAI Studio framework. Customers running the SensibleAI Studio Standard package already have the foundational dependencies installed. The steps below describe what is required specifically for Clustering Analysis on top of an existing SensibleAI Studio deployment.

Dependencies

Component	Description
OneStream Platform Version 9.3.0 or later	Minimum OneStream Platform version required for this version of Clustering Analysis.
SensibleAI Studio Standard package	Required for Clustering Analysis.
Xperiflow AI Services Version 4.4.0 or later	Minimum version required for this version of Clustering Analysis.

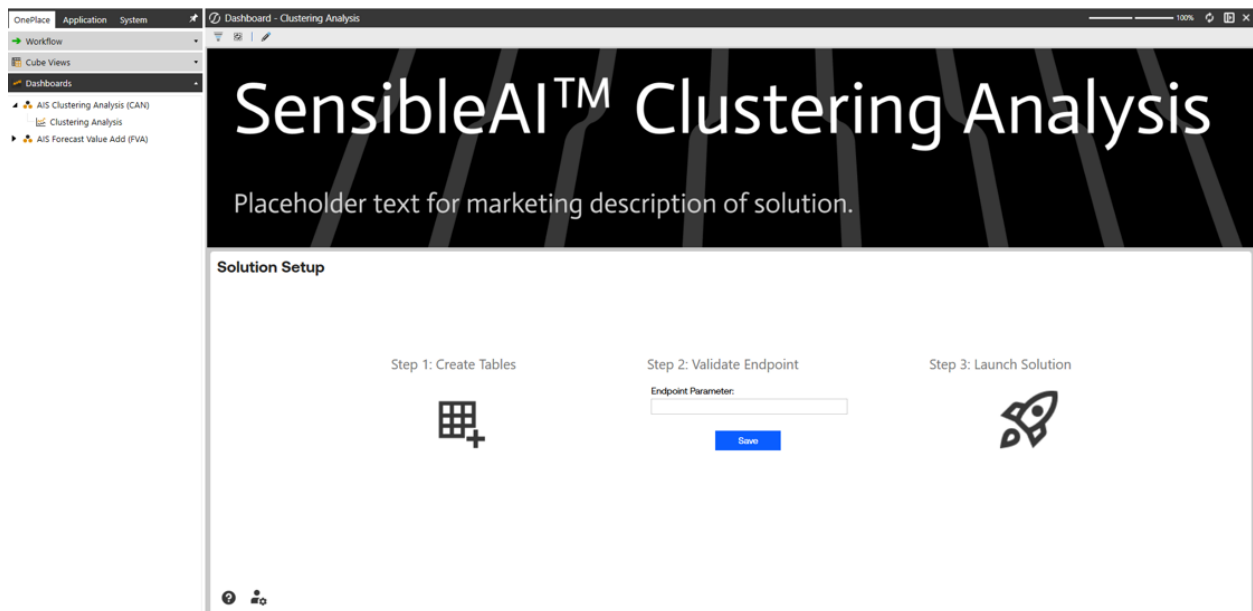
Installation

The *Getting Started with Solutions Guide* provides general instructions to install and configure OneStream Solutions. It also includes the recommended display settings, package file name information, advice for solution database migration, and considerations for modifications to solutions.

See the *Getting Started with Solutions Guide*.

Set Up Clustering Analysis

After installing the requisite dependencies and SensibleAI Clustering Analysis from the Solution Exchange, setup can be completed directly in the solution, launched through the OneStream application.

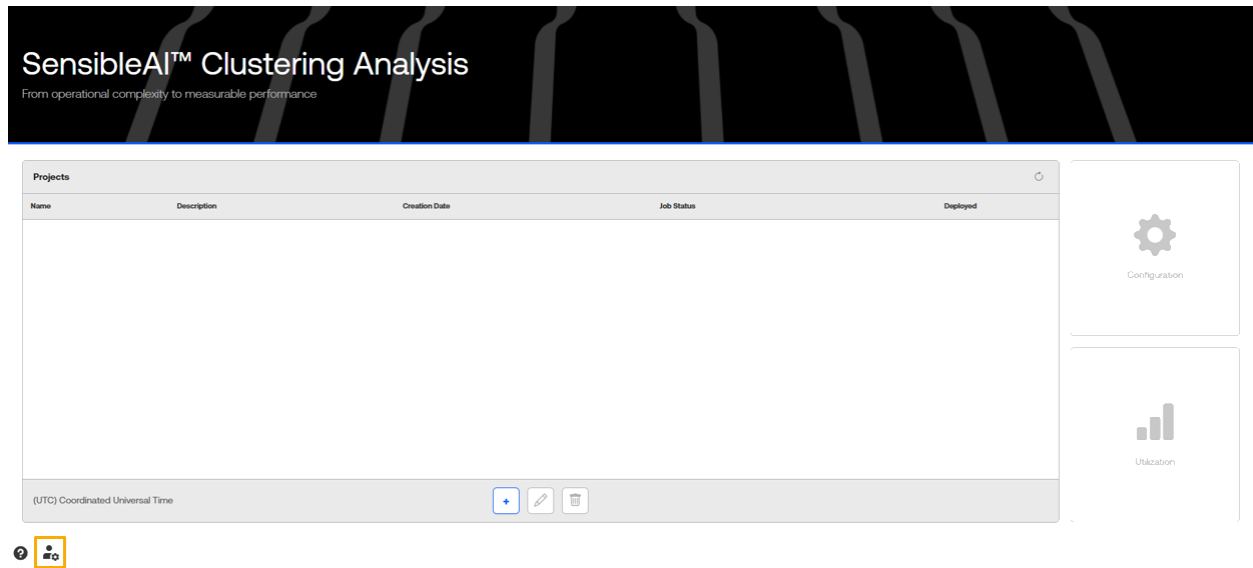


Setup and Installation

To install Clustering Analysis in a target OneStream application, complete the following high-level steps:

1. Launch Clustering Analysis from the OnePlace pane.
2. Create application tables.
3. Input SensibleAI Services endpoint url.
4. Launch the solution.

Settings



Uninstall

- Uninstall UI uninstalls all front-end solution elements (Workspace, dashboard components, etc.) without deleting the underlying data.
- Uninstall Full uninstalls all front-end and back-end solution elements including data. This operation is not reversible.

Solution Info

The Solution Info dialog box reports the installed version of Clustering Analysis.

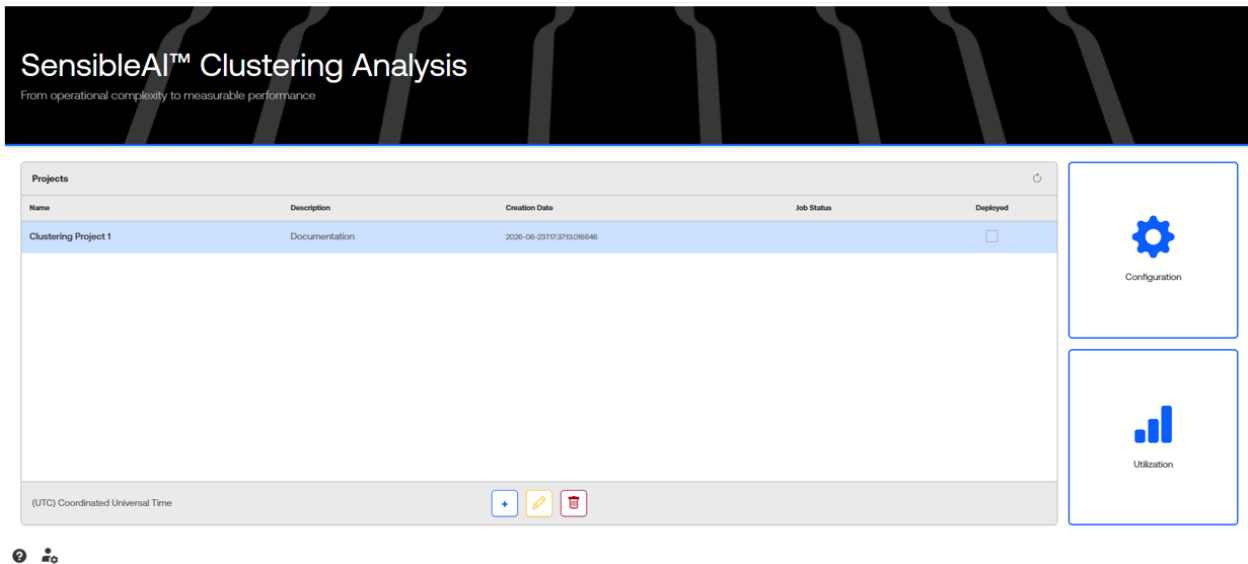
Navigation in Clustering Analysis

The Clustering Analysis solution presents two top-level sections: Configuration and Utilization. Configuration is where the clustering model arena is configured and run, clusters are reviewed, and the project is deployed. Utilization is where deployed projects can create workflows and performance scores, as well as executing and reviewing configured workflows. Review the following sections:

- [Home Page](#)
- [Configuration](#)
- [Utilization](#)

Home Page

The Home page is where you can create new projects. Select the + icon to step through establishing your new project. See [Creating a New Project](#). Once configured, the Clustering Analysis Home page lists existing clustering projects in the current application. It provides quick access to the Configuration and Utilization sections for each project.



Creating a New Project

Project Information

Name your new project and optionally add a detailed description.

Data Source

Configure the data source for your new clustering project. Select one of the following Connection Types:

- **MetaFileSystem**: for data sets that exist in the SensibleAI Storage Account.
- **SQL Server**: for connecting to external databases.
- **OneStream Cube**: for connecting to existing OneStream Cube Views.
- **Partitioned File**: for optionally many different partitioned files stored in a single metafile system directory.

Navigation in Clustering Analysis

Create New Clustering Project

Configure a new clustering analysis project with a data source

Data Source
Select the data source for the clustering project. This should be a dataset containing one row per entity, with identifier columns and feature columns.

Connection Type

MetaFileSystem

SQL Server

OneStream Cube

Partitioned File

Database Resource

RMTHO-D6999

The name of the database resource to connect to.

Database Name

DataSense_DataSources

The name of the database to connect to.

Table Name

Clustering_Demo_Dataset

Connect & Validate Schema

Cancel

Create Project

Once a Connection Type is selected, select the **Connect & Validate Schema** to continue to the next step.

Column Configuration

Review the following selections to be made in this section.

Data Date

The date which the data in the configured data set represents. This is especially useful for drift analysis where the solution finds the time that a drift occurred based on this date input.

Clustering Dimensions

The columns that uniquely identify the items being clustered.

Feature Columns

Feature selection determines which columns from the source data are used as inputs to the clustering model. A well-selected feature set is the most important configuration decision, since features drive what the clusters end up looking like.

The recommended practice is to select features that describe operations behavior rather than financial outcomes. For example, when clustering sales reps, pipeline velocity and deal progression rates are good features. Quota attainment is not. Feeding outcome variables into clustering tends to reproduce existing performance tiers rather than reveal behaviors that produce them.

Measure Columns

The columns that provide data to be used for defining performance scores or other measures. These columns can overlap with Feature Columns, but it is recommended that they be kept separate for better findings from the solution.

Clustering Scopes (Optional)

A subset of Clustering Dimensions that enable the segregation of the source data. Each unique value in these columns deploys a different trained clustering model. This should be used only if the data source contains items that should never be placed in the same cluster.

Email Column (Optional)

The column containing the email address associated with the clustering item in that row. That email will become the default in workflow email generation for the item in question.

Navigation in Clustering Analysis

Create New Clustering Project

Configure a new clustering analysis project with a data source

Column Configuration

Select which columns to use as clustering dimensions, scope, features, and measures.

Clustering Dimensions *

x

Entity

x

Columns that uniquely identify each entity being compared (e.g. Customer ID, Employee ID).

Feature Columns *

Select All

Clear All

x

distance_to_closest_competitor_mi

x

market_density_idx

x

mix_accessories_pct

x

mix_apparel_pct

x

mix_equipment_pct

x

sq_ft

x

tenure_years

x

Columns used to calculate the cluster segments.

Measure Columns

Select All

Clear All

x

measure_acct_50020_usd

x

measure_acct_50100_usd

x

measure_acct_50200_usd

x

measure_acct_51120_usd

x

measure_acct_51140_usd

x

measure_acct_52000_usd

x

measure_acct_52030_usd

x

measure_acct_52200_usd

x

measure_acct_52240_usd

x

measure_acct_53000_usd

x

measure_acct_53020_usd

x

measure_acct_54110_usd

x

measure_acct_54130_usd

x

measure_acct_54160_usd

x

measure_acct_54190_usd

x

measure_acct_54195_usd

x

measure_annual_sga_usd

x

measure_gross_margin_pct

x

measure_revenue_per_sqft

x

measure_revenue_per_visitor

x

sq_ft

x

← Back to Data Source

Cancel

Create Project

- Numeric features are scaled automatically. No pre-processing is required.
- Categorical features are encoded automatically using generative AI to extract meaningful structure from text fields.
- Missing values are filled using strategies appropriate to each feature type. The selected strategy is reported in the configuration view.
- Features can be weighted to emphasize strategic drivers, although the default unweighted configuration is appropriate for most use cases.

Once configured, select the **Create Project** button to set up the project and be taken directly to the Configuration section for your new project.

SensibleAI Clustering Analysis Guide

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Configuration

The Configuration section provides the tools to define clusters. Configuration is typically owned by an implementor, administrator, or power user working alongside the functional lead during initial setup. Cluster configuration is the first half of any deployment. A cluster set defines the entities being clustered, the features that describe their behavior, and the resulting peer groups. The same cluster set can be referenced by multiple workflow downstream.

The section is divided into a three step process: Model, Clusters, and Deploy.

Model

In this tab you can optionally provide additional details about the data being used in your clustering project. The following are good examples of contexts to include:

- Information about the industry
- Entity type being clustered
- Project objectives
- Special considerations about the data

Navigation in Clustering Analysis

Clustering Project 1
Clustering Analysis Engine



Model

>

Clusters

>

Deploy

**Large Language Model Context**
Provide rich context about the dataset to power AI-driven clustering insights

Describe the data

Provide context about the data being used for clustering. This helps ensure the model is configured appropriately for the specific use case...

Example:
This dataset belongs to a retail e-commerce company specializing in outdoor gear and equipment. We're analyzing customer purchase patterns to identify distinct customer segments for targeted marketing campaigns. The dataset contains 2 years of transaction data including customer demographics, purchase history, product categories, seasonal patterns, and customer lifetime value. Key business objectives include increasing customer retention and optimizing inventory allocation across different customer segments.

 **Tips for better results**

 Describe the industry and business domain

 Mention the data collection time period

 Identify the entities being clustered

 State the objective behind running the clustering

 Describe each feature in the Advanced Configuration dialog

 Note any known patterns or seasonality

 Run Model Arena to continue to Clusters

 Advanced Configuration

 Run Model Arena

Advanced Configuration

Advanced Configuration controls the clustering algorithm and its quality parameters. Most deployments can rely on default settings. Advanced Configuration is exposed for cases where the data has unusual characteristics or the implementation team has specific requirements.

Navigation in Clustering Analysis

**Advanced Configuration**✕
Fine-tune preprocessing and feature settings for optimal clustering results

**Missing Value Strategy**
Choose how to replace null values in numeric features before clustering.
Fill Method

Mean ✕ ▼

**Feature Normalization**
Scale all features to a common range so no single feature dominates the clustering. ☒

**Feature Weighting**
Set each feature's influence on cluster formation. Higher weights increase importance. Add descriptions for richer AI insights.

Source Feature Column	Feature Weight	Feature Description
sq_ft	1.00	Description...
distance_to_closest_com...	1.00	Description...
market_density_idx	1.00	Description...
tenure_years	1.00	Description...
mix_apparel_pct	1.00	Description...

Page Size: 100 ▼ ⏪ ⏩ Page 1 of 1 ⏪ ⏩

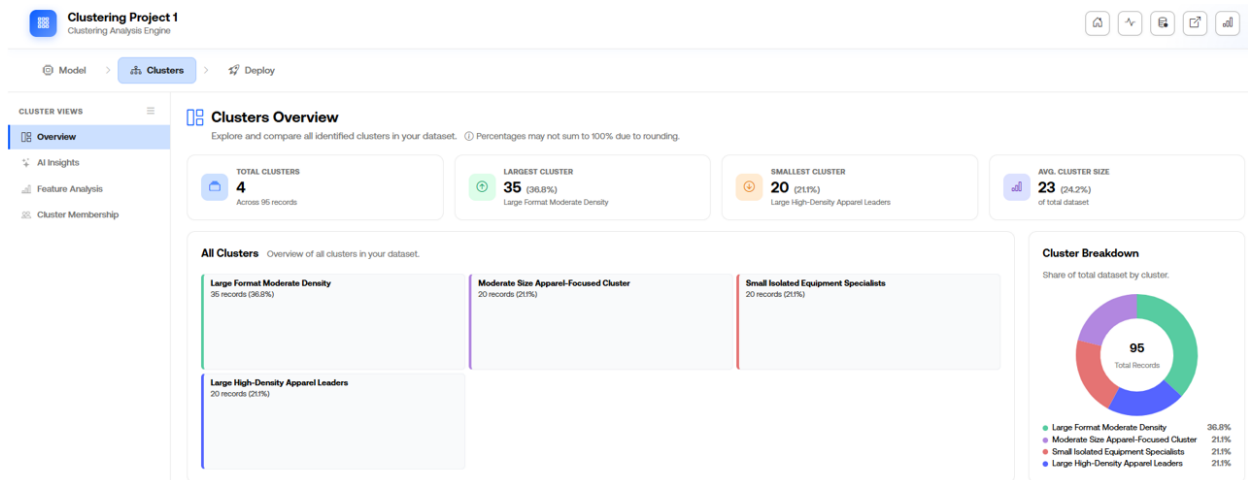
Clusters

The Clusters tab contains four pages needed to analyze cluster quality and interpretability. Once a cluster is generated, all pages are accessible from the Clusters page.

Overview

High-level overview of the generated clusters. This page includes the number of clusters, distribution of entities amongst the generated clusters, and the AI-generated labels of each cluster.

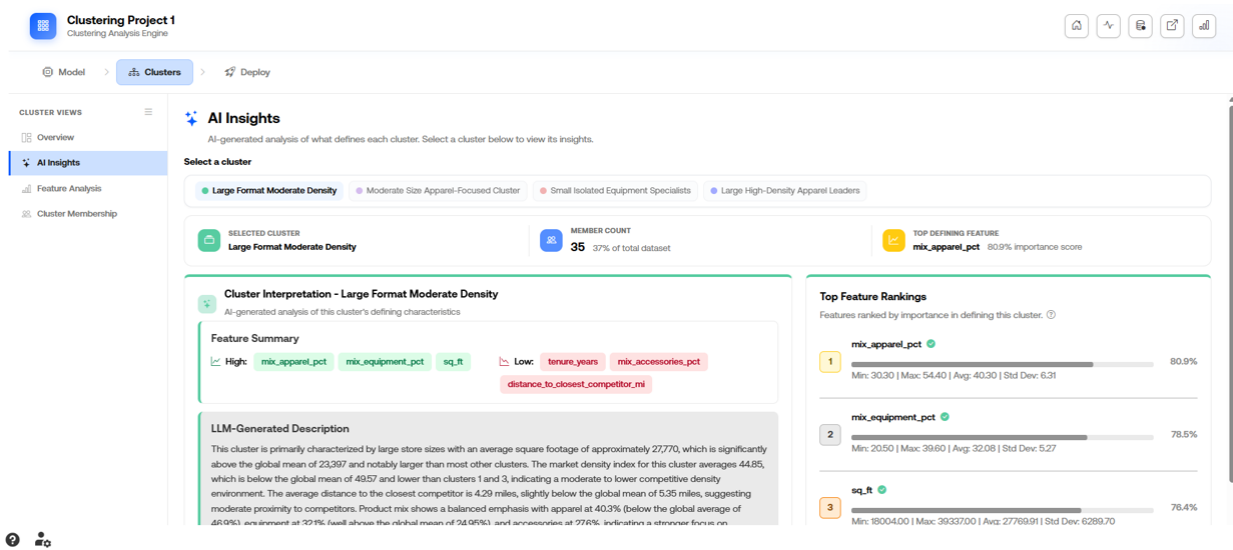
Navigation in Clustering Analysis



AI Insights

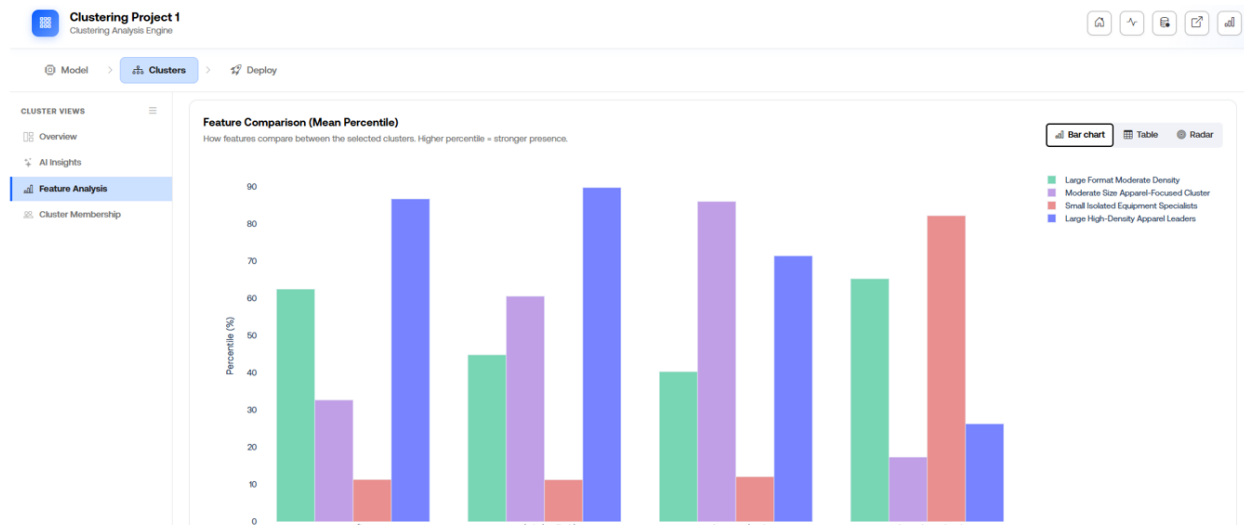
This view highlights the AI-generated description of each cluster and details on the features that proved to be most important in defining that cluster. Feature importance ranks features by how much they contributed to the cluster definitions. Features with high importance are the ones that meaningfully separate one cluster from another. Features with low importance had little effect on the groups and can sometimes be removed to simplify configuration. Feature importance is also a useful audit tool. If a feature with high importance is one the business considers irrelevant or inappropriate, the cluster set should be revised.

Navigation in Clustering Analysis



Feature Analysis

The Feature Analysis view shows the distribution of feature values within each cluster. This is the primary view for understanding what makes each cluster distinct. For example, a cluster of stores might be characterized by high foot traffic, low average order value, and an urban geography distribution. This data can be viewed as a bar chart, a standard table, or a radar chart.



Navigation in Clustering Analysis

Cluster Membership

The Cluster Membership view gives a close to raw data view for the clustering data, enabling the user to select specific clusters and measures/features to analyze. This view can be useful if attempting to export clustering data to analyze in an external system.

Clustering Project 1
Clustering Analysis Engine

Model > Clusters > Deploy

CLUSTER VIEWS

- Overview
- AI Insights
- Feature Analysis
- Cluster Membership

measure_acct_5400_usd measure_acct_5410_usd measure_acct_5420_usd measure_annual_high_usd measure_gross_margin_pct measure_revenue_per_sqft measure_revenue_per_sqft measure_revenue_per_sqft max_accessories_pct

mix_apparel_pct mix_equipment_pct sq_ft tenure_years

Members (95)
Select clusters above to view their members.

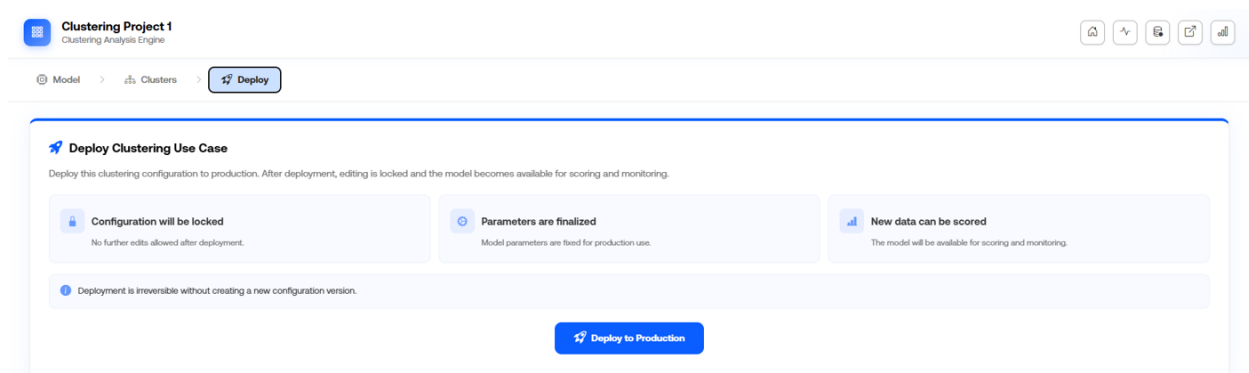
Entity	AssignedClusterName	AssignedClusterNo.	distance_to_closest...	market_density_idx	measure_acct_5002...	measure_acct_5010...	measure_acct_5020...	measure_acct_5120...	measure...
EUS10	Large Format Modera...	0	6.4	46.8	47396	71093	37965	35547	59244
EUS02	Large High-Density A...	3	0.2	86.2	95888	143833	76707	7196	198661
EMX10	Large Format Modera...	0	3.5	45.2	57221	85831	457764	42915	75526
EUS11	Large High-Density A...	3	1.3	90.2	132602	198902	1060813	99451	165765
EUS12	Large Format Modera...	0	3.6	60.9	69191	99286	529528	49643	82739
EUS13	Small Isolated Equipm...	2	6.6	7	13717	20575	109734	10288	17146
EUS14	Moderate Size Appar...	1	1.2	62.7	93757	140636	750058	70318	117197
EUS15	Large Format Modera...	0	7.9	36.7	64684	97026	517474	48613	80866
EUS16	Large High-Density A...	3	0.6	75.3	100453	150680	803624	75340	125561

Page Size: * << Page 1 of 7 >>

Deploy

The Deploy page enables users to mark their clustering configuration as final for a given project. This locks configuration, not allowing any further edits to be made on the Model page. This also enables the Utilization section for the project, allowing performance scores and workflows to be configured. Selecting the Deploy to Production button on the page automatically runs the process and prompts the user to navigate directly to the utilization page.

Navigation in Clustering Analysis



Utilization

The Utilization section is where end users execute and review workflow outputs. Utilization is the day-to-day surface for end users of Clustering Analysis. There are several pages available within this section: Performance Scoring, Workflow Builder, Ranking Analysis, Cluster Membership, and Workflows.

Performance Scoring

Performance scores define good and bad for the data being clustered. This can be as simple as a single profit margin metric if something like stores are being clustered. It can also form a blend of many metrics, such as quota attainment, pipeline size, deal velocity, and so on, when clustering sales reps. See [Creating a Performance Score](#).

Navigation in Clustering Analysis

The screenshot shows the 'Performance Score Definition' page. On the left is a sidebar with navigation links: UTILIZATION, CONFIGURE (with sub-links for Performance Scoring and Workflow Builder), ANALYSIS (with sub-links for Ranking Analysis and Cluster Membership), and WORKFLOWS (showing 'No workflows yet'). The main content area is titled 'Performance Score Definition' with a subtitle 'Create and manage multiple named performance score definitions'. A blue 'Save and Apply Score' button is in the top right. A blue information banner states: 'Performance scores are key to help define what is important when comparing features and clusters against each other. They are necessary when building any type of workflow.' Below this is a 'Select or Create Performance Score' section with a dropdown to 'Create New Score' and a text field for 'Score Name' (containing 'e.g., Overall Financial Performance'). A 'Metric Weights' section allows adjusting the importance of metrics with sliders. Two metrics are shown: 'Measure Annual Sga Usd' and 'Measure Revenue Per Sqft', both at 5% weight with a 'Higher is better' direction. A 'Score Preview' section on the right shows a table of top performers.

RANK	MEMBER	TIER	SCORE
#1	EDE03	Top Performers Top 25%	2,486
#2	EAL04	Top Performers Top 25%	2,300
#3	EMO04	Top Performers Top 25%	2,227

Below the table is a 'Show more' link.

Workflow Builder

The Workflow Builder page provides a simple interface for creating and configuring new workflows. The page also shows the different workflow that have already been created within the current project, if there are any. See [Configuring Workflows](#).

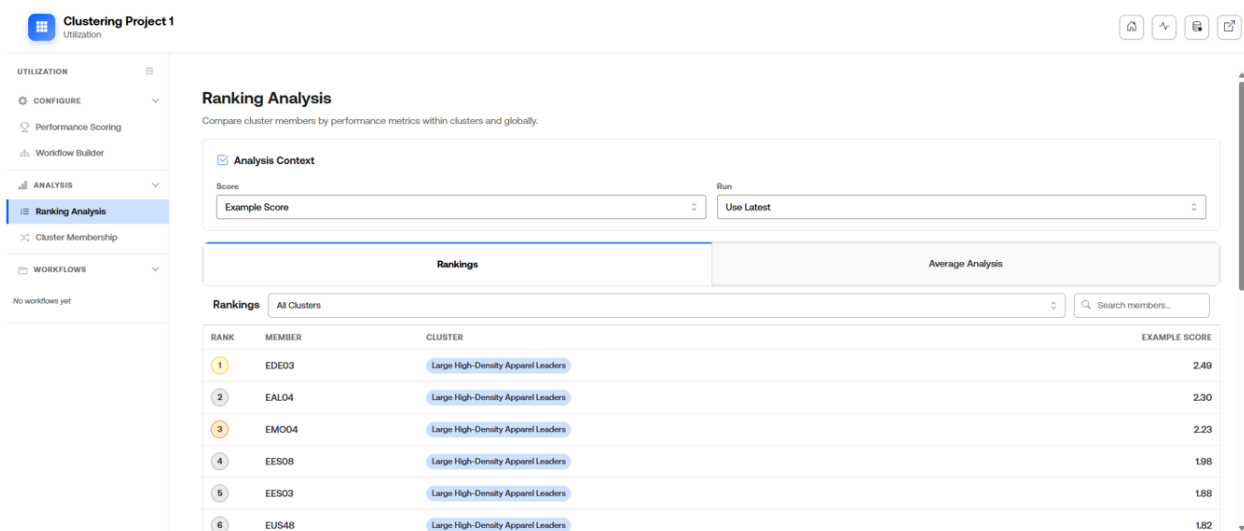
The screenshot shows the 'Create Workflow' page. The sidebar is identical to the previous screenshot. The main content area is titled 'Create Workflow' with a subtitle 'Fill in the steps below, then save from the summary panel.' It consists of four steps: 1. Workflow Basics (Name and Description fields), 2. Analysis Type (three options: Drift Analysis, Peer Group Analytics, and Benchmarking), 3. Workflow Configuration (a placeholder for settings), and a Workflow Summary panel on the right. The Summary panel shows 'ANALYSIS TYPE' and 'PERFORMANCE SCORE' as 'Not selected', lists 'REQUIRED SETUP' (Workflow name, Analysis type, Performance score), and has 'Save Workflow' and 'Cancel' buttons.

Ranking Analysis

A static analysis page that exists outside of the benchmark framework. This page can be used to analyze how individual entities or groupings stack up against each other across different clusters, data updates, performance scores, measures, and so on. This data can be analyzed as static rankings or in an interactive chart.

Rankings

View a static ranking of all members in the selected clusters and their calculated performance score. This page can also display individual measures instead of composite performance scores, or it can be filtered down to a particular cluster as opposed to looking at all members collectively.

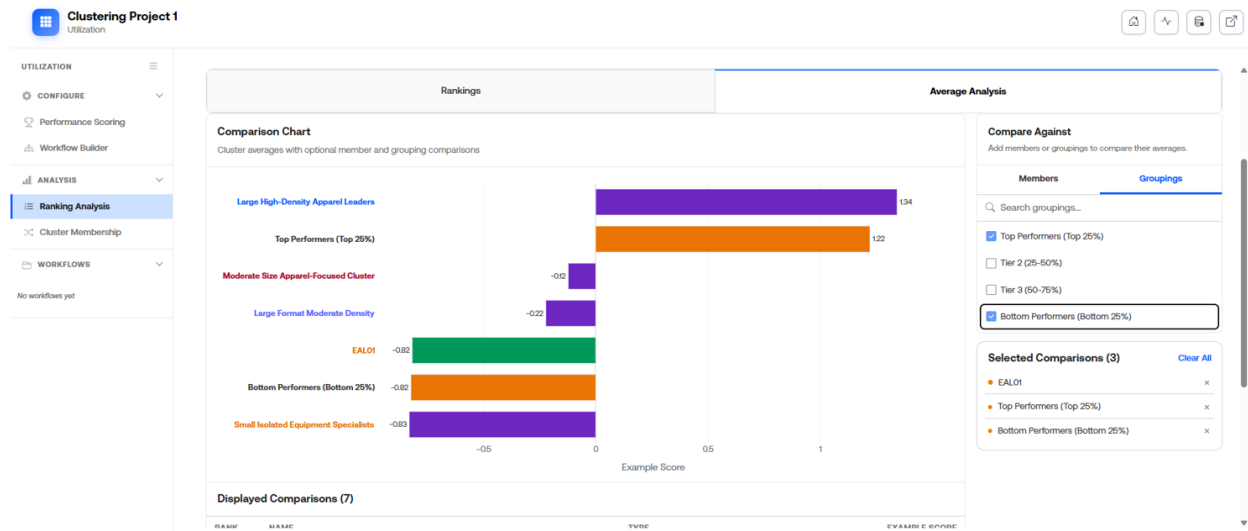


Average Analysis

Interact with the same data in an interactive bar chart. You can compare individual members to all clusters or groupings and analyze the results in an easily-digestible bar chart or tabular list.

Grouping sections are driven by performance score tiers as well as any categorical features in the original data set.

Navigation in Clustering Analysis



Cluster Membership

This is a static analysis page that surfaces the same Cluster Membership tab from the Configuration section. It enables users to select specific clusters and features/measures to analyze in a raw tabular format. This view can be useful if attempting to export clustering data to analyze in an external system.

Workflows

This section contains all configured workflows available within the project. See [Using Workflows](#).

Toolbar

The Clustering Analysis toolbar has four icons that are accessible from any page within the Configuration and Utilization sections.

Navigation in Clustering Analysis



Home

Select this icon to navigate back to the SensibleAI Clustering Analysis home page, enabling the user to interact with different projects' Configuration or Utilization sections.

Activity Log

Select this icon to launch a model containing all tasks that have been run within the current clustering project. This will display details of clustering fits, predicts, performance score creations, workflow executions, and so on, along with their statuses and additional information as appropriate. This table can be filtered to specific timelines, job types, status types, and so on.

Look Back Period

Run Status

Username

Routine Type

Clear

Last 8 Hours

All Statuses

All Users

All Types

Time scope: Last 8 Hours

Runs 73

Search runs by name, method, type...

All Statuses

Clear

Refresh

Run Name	Method	Type	Status	Username	Duration	Created	Modified
Clustering Project 1 - Utilization create_performance_score 2026-06-23 162803-988489	create_performance_score	in-memory	Completed	System	0m 1s	Jun 23, 08:28:04 PM UTC	Jun 23, 08:28:05 PM UTC
Clustering Project 1 deploy 2026-06-23 155935-384920	deploy	in-memory	Completed	System	0m 20s	Jun 23, 07:59:35 PM UTC	Jun 23, 07:59:56 PM UTC
Clustering Project 1 - Utilization create_web_app 2026-06-23 155945-843630	create_web_app	background	Completed	System	0m 1s	Jun 23, 07:59:46 PM UTC	Jun 23, 07:59:47 PM UTC
Clustering Project 1 - Utilization __init__ 2026-06-23 155938-523039	__init__	background	Completed	System	0m 0s	Jun 23, 07:59:38 PM UTC	Jun 23, 07:59:39 PM UTC
kmeans-1-2026-fftyzd-ilm-instance generate_cluster_labels 2026-06-23 151005-543707	generate_cluster_labels	background	Completed	System	0m 2s	Jun 23, 07:10:06 PM UTC	Jun 23, 07:10:08 PM UTC
FeatureEngineeringAnalysis 2026-06-23 145232-861378 inverse_transform 2026-06-23 150943-855211	inverse_transform	background	Completed	System	0m 2s	Jun 23, 07:09:44 PM UTC	Jun 23, 07:09:47 PM UTC
KMeans-1-20260623-145844 fit 2026-06-23 150908-415147	fit	background	Completed	System	0m 3s	Jun 23, 07:09:09 PM UTC	Jun 23, 07:09:12 PM UTC

Data Update

Select this icon to launch a model containing the various options for updating the data used by the current clustering project. Data can be either refreshed or replaced, or a user can choose to review the current data set as it currently stands. Replacing data enables the user to select a new data source, while refresh will maintain the existing configuration as it stands. If a project has already been deployed, the clustering dimensions and feature columns must be identical to the data set that was used for the initial clustering fit. In either case, a new Data Date should be specified.

The screenshot shows a modal window titled "Update Data Source" with a close button (X) in the top right corner. Below the title is a subtitle: "Update the data source for this project. Changes will apply to all use cases." In the top right corner of the modal is a button labeled "View Current Dataset".

The main content area is divided into two sections:

- Data Source Configuration:** This section contains a heading "Select Update Type" and two selectable options:
 - Refresh:** Represented by a blue button with a refresh icon and the text "Pull additional data from the original data source." It is currently selected.
 - Replace:** Represented by a white button with a document icon and the text "Replace with a new data source. Must contain all original dimension and feature columns."
- Data Date:** This section contains a heading "Select the date this data came from. Defaults to today." and a date input field showing "2026-06-23".

Below these sections is a **Current Data Source** section with the subtitle "Refreshing will pull additional data from the existing data source." It contains three fields with icons and labels:

- Database Resource:** RMTHO-D6999
- Database Name:** DataSense_DataSources
- Table Name:** Clustering_Demo_Dataset

Data Export

Select this icon to launch the data export model. From this model, a user can select specific clustering artifacts to export to an external destination. This can be useful if there is detailed analysis or use cases for clustering data outside of the Clustering Analysis solution.

Navigation in Clustering Analysis

Export Configuration

1 Select Run

Select...

2 Select Artifact

Select...

3 Export Type

Select...

4 Connection

5 Destination

Destination File Name

Cluster_Results

Use only letters, numbers, and underscores. Maximum 50 characters.

Export

Creating a Performance Score

The Performance Score is a composite KPI used to rank entities within each cluster and to determine whether drift between clusters is positive or negative. A single Performance Score can be referenced by multiple workflows.

A Performance Score is defined as a weighted combination of available measures. For example, an Efficiency Score for cost benchmarking might combine cost per unit, service level adherence, and risk metric. A Customer Value Score might combine margin contribution, engagement, retention, propensity, and cost-to-serve.

- Measures are selected from the source data.
- Weights and directions are assigned to each measure. The total weight should sum to 100. Direction indicates whether a larger value or smaller value is better for a given measure.
- The resulting score is normalized so that scores are comparable across clusters.

As adjustments are made to include/exclude available measures or weights and directions are edited, the Score Preview card will show a live view of the resultant top or bottom performers as scored by the current Performance Score definition.

Once a Performance Score is assigned to a workflow and used, its configuration is locked. This ensures that historical analyses are not affected by future changes. If a new score is needed for a similar type of analysis, the user should create a new Performance Score.

Creating a Performance Score

UTILIZATION

CONFIGURE

Performance Scoring

Workflow Builder

ANALYSIS

Ranking Analysis

Cluster Membership

WORKFLOWS

No workflows yet

Clustering Project 1

Utilization

Save and Apply Score

Performance Score Definition

Create and manage multiple named performance score definitions

Performance scores are key to help define what is important when comparing features and clusters against each other. They are necessary when building any type of workflow.

Select or Create Performance Score

Choose an existing score to edit or create a new one with a custom name

Performance Score

Score Name

+ Create New Score

Example Score

Metric Weights

Adjust the importance of each performance metric

Normalize

METRIC	WEIGHT	DIRECTION
Measure Annual Spa Used	5%	↑ Higher is better
Measure Revenue Per Sqft	5%	↑ Higher is better
Measure Revenue Per		

Score Preview

Preview top and bottom performers based on current configuration

Top Performers

Bottom Performers

RANK	MEMBER	TIER	SCORE
#1	EDE03	Top Performers Top 25%	2.486
#2	EAL04	Top Performers Top 25%	2.300
#3	EMO04	Top Performers Top 25%	2.227
#4	EES08	Top Performers Top 25%	1.981
#5	EES03	Top Performers Top 25%	1.877
#6	EUS48	Top Performers Top 25%	1.823
#7	EUS20	Top Performers Top 25%	1.632
#8	EUS43	Top Performers	1.606

Configuring Workflows

Once a clustering project is deployed, workflows can be configured. A workflow combines the clustering data set, a Performance Score definition, and a set of workflow-specific settings.

Every workflow in Clustering Analysis follows a consistent configuration pattern. The administrator or power user selects a Performance Score and configures workflow-specific settings, such as the accounts to benchmark, the measures to compare, or the snapshots to use for drift analysis. Once configured, the workflow is ready for end users to execute.

Workflow Builder

The Workflow Builder is the configuration surface for each of the three workflow types. The Workflow Builder is reached from the Configuration section of the Clustering Analysis home page.

Every workflow requires a name, an optional description, and a Performance Score. Each workflow type will have additional pieces of configuration required for that specific workflow.

Draft Analysis Workflow Configuration

A Drift workflow compares multiple snapshots of a deployed cluster set and surfaces the entities that moved between clusters. There are two additional pieces of configuration needed for Drift Analysis beyond a name and Performance Score:

- Earliest Prediction: The earliest data date to consider for the comparison.
- Latest Prediction: The latest data date to consider for the comparison.

Configuring Workflows

Clustering Project 1
Utilization

UTILIZATION
CONFIGURE
Performance Scoring
Workflow Builder
ANALYSIS
Ranking Analysis
Cluster Membership
WORKFLOWS
No workflows yet

Create Workflow

Fill in the steps below, then save from the summary panel.

Workflow Basics

Name *
Drift Example

Description
Enter an optional description

Analysis Type

Drift Analysis
Detect and track changes in entity performance over time.

Peer Group Analytics
Group entities into peer cohorts and rank within each group.

Benchmarking
Benchmark entities against top performers within each cluster to identify savings opportunities.

Drift Analysis Configuration

Earliest Prediction
Jun 01, 2026

Latest Prediction
Jun 30, 2026

Default analysis window. Can be overridden at execution time.

Performance Score
Example Score

The performance score definition used to evaluate drift.

Workflow Summary

ANALYSIS TYPE
Drift Analysis

PERFORMANCE SCORE
Example Score

ANALYSIS WINDOW
Jun 01, 2026 – Jun 30, 2026

REQUIRED SETUP

Workflow name
Analysis type
Performance score

Save Workflow
Cancel
Save and continue editing later.

Peer Group Analytics Workflow Configuration

A Peer Group workflow generates a scorecard for an individual entity, comparing it to the top performers (top 25% as calculated by the selected performance score) within its peer group on a configured set of measures. There are two multi-select options to configure Peer Group Analytics beyond its name and performance score:

- **Acceptable Groupings:** Select from the set of dimension columns that will be treated as alternative groupings for each entity. The entity's assigned cluster will always be an option, and the default selection for the workflow. Examples could include Region, Responsible SVP, Revenue Tier, and so on.
- **Measures for Entity Scorecards:** Select from the set of available measures configured on the project data source to display on the resultant score cards. These will not necessarily be used to calculate performance, but will be what is actually compared on the score cards generated by the workflow.

Configuring Workflows

The screenshot displays the 'Clustering Project 1 Utilization' interface. On the left, a sidebar menu includes 'UTILIZATION', 'CONFIGURE', 'Performance Scoring', 'Workflow Builder' (highlighted), 'ANALYSIS' (with sub-items 'Ranking Analysis' and 'Cluster Membership'), and 'WORKFLOWS' (with the note 'No workflows yet'). The main content area is divided into three sections: 1. 'Workflow Basics' with fields for 'Name' (set to 'Peer Group Example') and 'Description' (placeholder: 'Enter an optional description'). 2. 'Analysis Type' with three options: 'Drift Analysis' (Detect and track changes in entity performance over time.), 'Peer Group Analytics' (Group entities into peer cohorts and rank within each group. - selected), and 'Benchmarking' (Benchmark entities against top performers within each cluster to identify savings opportunities.). 3. 'Workflow Configuration' with 'Acceptable Groupings' (radio button for 'Entity' selected, with instruction: 'Select the dimension columns that entities can be grouped by for peer comparison.') and 'Measures for Entity Scorecards' (checkboxes for 'measure_annual_sga_usd', 'measure_revenue_per_sqft', 'measure_revenue_per_visitor', 'measure_gross_margin_pct' are checked, and 'measure_acct_50200_usd' is unchecked). On the right, a 'Workflow Summary' panel shows 'ANALYSIS TYPE: Peer Group Analytics', 'PERFORMANCE SCORE: Example Score', 'REQUIRED SETUP' (all items checked: 'Workflow name', 'Analysis type', 'Performance score'), and 'Save Workflow'/'Cancel' buttons with a note 'Save and continue editing later.'

Benchmark Workflow Configuration

A Benchmark workflow compares each entity's accounts against the top quartile of its cluster to identify areas of opportunity for cost savings or revenue enhancements. There are five additional pieces of information that must be configured for benchmarking beyond a name and Performance Score:

- **Default Benchmark Method:** Select the default that will be used per-account to determine the benchmarking target. The suggested value is Mean. The other options are Median, First, Quartile, and Third Quartile. This controls how aggressive benchmarking targets will be.
- **Cube:** OneStream cube to use to retrieve account metadata from.
- **Scenario Type:** OneStream scenario type to use to sub-select the appropriate account dimension for metadata selection.
- **Accounts:** Launches a window enabling users to select from the resultant list of accounts to use in benchmarking.

Configuring Workflows

- **Map Accounts to Data Columns:** Choose the measure column that corresponds to the accounts selected in the previous step. This is required to provide the point-in-time comparison needed for clustering workflows. The Auto-Assign button will attempt to automatically map measure columns to configured accounts based on name similarity.

The screenshot displays the 'Clustering Project 1' Workflow Builder interface. On the left, a sidebar lists navigation options: UTILIZATION, CONFIGURE, Performance Scoring, Workflow Builder (selected), ANALYSIS, Ranking Analysis, Cluster Membership, and WORKFLOWS. The main workspace is divided into three sections: 1. Workflow Basics, 2. Analysis Type, and 3. Workflow Configuration. The 'Workflow Basics' section includes fields for 'Name' (containing 'Benchmarking Example') and 'Description' (with a placeholder 'Enter an optional description'). The 'Analysis Type' section offers three options: 'Drift Analysis' (Detect and track changes in entity performance over time), 'Peer Group Analytics' (Group entities into peer cohorts and rank within each group), and 'Benchmarking' (Benchmark entities against top performers within each cluster to identify savings opportunities), which is currently selected. The 'Workflow Configuration' section contains a 'Performance Score' field (with 'Example Score' and a clear button), a 'Default Benchmark Method' dropdown (set to 'Mean'), and a 'Cube' field. A note states: 'Select the OneStream accounts to include in benchmarking. Choose a cube and scenario type -- account options load automatically.' On the right, a 'Workflow Summary' panel shows the 'ANALYSIS TYPE' as 'Benchmarking', the 'PERFORMANCE SCORE' as 'Example Score', and a 'REQUIRED SETUP' section with three checked items: 'Workflow name', 'Analysis type', and 'Performance score'. At the bottom of this panel are 'Save Workflow' and 'Cancel' buttons, with a note 'Save and continue editing later.'

Using Workflows

This section describes the end-user experience for each of the three workflows. Workflows are executed from the Utilization section of the Clustering Analysis home page.

Workflow Execution Overview

Each workflow follows a three-step execution pattern. The user selects a configured workflow, reviews and optionally adjust the workflow inputs, and executes the workflow. The results are then available for review, distribution, and follow-up action. Workflow runs are retained in the run history for audit and comparison.

Drift Analytics

Drift analytics surfaces movement between clusters over time. The output is a set of drift patterns, each describing how a group of entities moved between specific clusters, with an explanation of why. The user can highlight selected drift patterns, making them available within the Drift Action and Drift History tabs.

Drift Overview

The Drift Overview tab is the main workflow tab that walks users through findings for each drift pattern.

Using Workflows

Drift Analysis — GolfStream Strategy Drift

Track member drift across clusters and identify actionable patterns.

Drift Overview

Drift Patterns (2) Auto Highlight

- Low-Spend High-Promotion Segment → High-Value Digital Shoppers Positive
Alt: 2 Recent: 2 Avg: +0.2
- High-Value Digital Shoppers → Low-Spend High-Promotion Segment Negative
Alt: 1 Recent: 1 Avg: -0.1

Drift Overview

Select a drift pattern to explore detailed insights.

About This Tab

The Drift Overview tab shows the most common drift patterns observed across the lifetime of this workflow. The sidebar on the left lists all detected drift patterns — a drift pattern is the movement of an entity from one cluster to another. Selecting a pattern reveals three levels of detail: the clusters involved, the individual members who moved, and analytical insights about what drove the movement.

Highlight Pattern Functionality

The highlight feature marks drift patterns that the business believes it can influence. Use the star button on each pattern card, or click 'Auto Highlight' to automatically select the top positive and negative patterns.

Important: Any highlighted pattern will appear on the Drift Actions tab with targeted recommendations on how to encourage or discourage that movement depending on its performance direction.

Getting Started

- Select a drift pattern from the left sidebar to view detailed cluster insights.
- Explore the three sub-tabs: Cluster Insights, Member Drift, and Drift Insights.
- Highlight patterns to track and act on via the Drift Actions tab.

Cluster Insights

The first view in Drift Analytics summarizes movement across all snapshots for the selected drift pattern. It also includes information about whether the selected drift pattern is positive or negative.

Drift Analysis — GolfStream Strategy Drift

Track member drift across clusters and identify actionable patterns.

Drift Overview

Drift Patterns (2) Auto Highlight

- Low-Spend High-Promotion Segment → High-Value Digital Shoppers Positive
Alt: 2 Recent: 2 Avg: +0.2
- High-Value Digital Shoppers → Low-Spend High-Promotion Segment Negative
Alt: 1 Recent: 1 Avg: -0.1

Low-Spend High-Promotion Segment → High-Value Digital Shoppers

Positive drift pattern — 2 total movements

1. Cluster Insights

FROM Low-Spend High-Promotion Segment

PERFORMANCE RANK	TOTAL MEMBERS	AVG PERFORMANCE
2 of 2	67	-0.03

TO High-Value Digital Shoppers

PERFORMANCE RANK	TOTAL MEMBERS	AVG PERFORMANCE
1 of 2	28	0.14

Direction: Positive — 2 members moved with avg performance delta of 0.173

Member Drift

The Member Drift view drills into a selected drift pattern and lists the specific entities that experienced the movement. For each entity, the view shows the source cluster, the target cluster, and which features changed most.

Drift Patterns (2) Auto Highlight

Low-Spend High-Promotion Segment Positive

→ High-Value Digital Shoppers

All: 2 Recent: 2 Avg: +0.2

High-Value Digital Shoppers Negative

→ Low-Spend High-Promotion Segment

All: 1 Recent: 1 Avg: -0.1

Save Selections

Low-Spend High-Promotion Segment → High-Value Digital Shoppers

Positive drift pattern — 2 total movements

1. Cluster Insights

2. Member Drift

3. Drift Insights

Member Name	Date	Performance Δ
EUS24	2026-06-23	+1.168
EMX13	2026-06-23	+1.206

EUS24

Low-Spend High-Promotion Segment → High-Value Digital Shoppers

Performance Change

+1.168

Cluster Dimension Changes

measure_revenue_per_sqft

+40.3%

Before: 144.00 → After: 202.00

measure_annual_rev_usd

+40.0%

Before: 4160330.00 → After: 5824462.00

Drift Insights

The Drift Insights view synthesizes the findings of the previous two steps, highlighting what changed when the drift occurred on average, enabling users to draw further conclusions about the drift pattern being positive or negative.

Using Workflows

Drift Patterns (2) ⚡ Auto Highlight

Low-Spend High-Promotion Segment Positive

→ High-Value Digital Shoppers ☆

All: 2 Recent: 2 Avg: +0.2

High-Value Digital Shoppers Negative

→ Low-Spend High-Promotion Segment ☆

All: 1 Recent: 1 Avg: -0.1

Save Selections

Low-Spend High-Promotion Segment → High-Value Digital Shoppers

Positive drift pattern — 2 total movements

1. Cluster Insights

2. Member Drift

3. Drift Insights

Highlight This Pattern

Highlight drift patterns that the business could influence for future focus.

↕ Drift Direction: Positive

This drift pattern represents an improvement in member value and performance metrics.

What Changed

Average feature changes for members that drifted from Low-Spend High-Promotion Segment to High-Value Digital Shoppers.

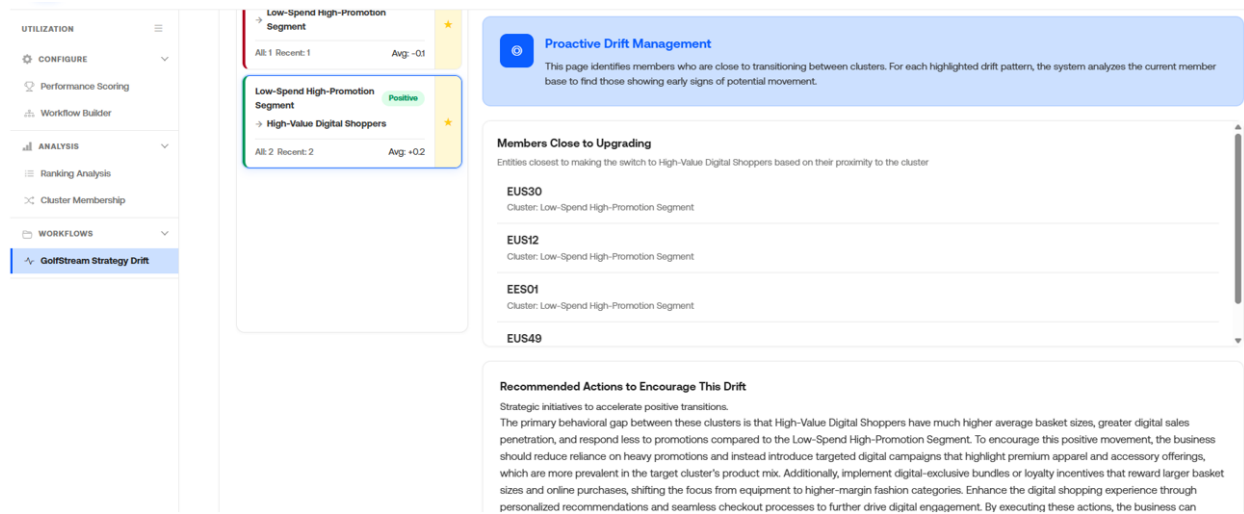
measure_revenue_per_sqft	149.50	→ 209.50	↗ +40.1%
measure_annual_rev_usd	4921327.50	→ 6889858.50	↗ +40.0%
measure_revenue_per_visitor	1.93	→ 2.46	↗ +27.5%

After reviewing each drift pattern's screens, users should highlight those patterns that they feel they could learn from in future and save those selections. This enables the other two tabs of the workflow.

Drift Actions

This page identifies entities that are close to experiencing the selected drift pattern. These are entities that could be influenced to continue evolving in a positive direction, or be a direct signal of need for intervention to avoid a negative evolution. In addition to identifying members to focus on, the solution also produces real, actionable advice about how to encourage/discourage the movement through an AI-powered analysis of the previous tab.

Using Workflows



Drift History

This tab keeps track of previous entities that were called out as close to upgrading/degrading on the Drift Actions tab, and then records whether the entity did or did not eventually experience that drift. In the case of a positive drift pattern, an entity eventually experiencing the selected drift pattern would be classified as a successful intervention, while a regression towards the original cluster would be classified as an unsuccessful intervention. The inverse would be true in the case of a negative drift pattern.

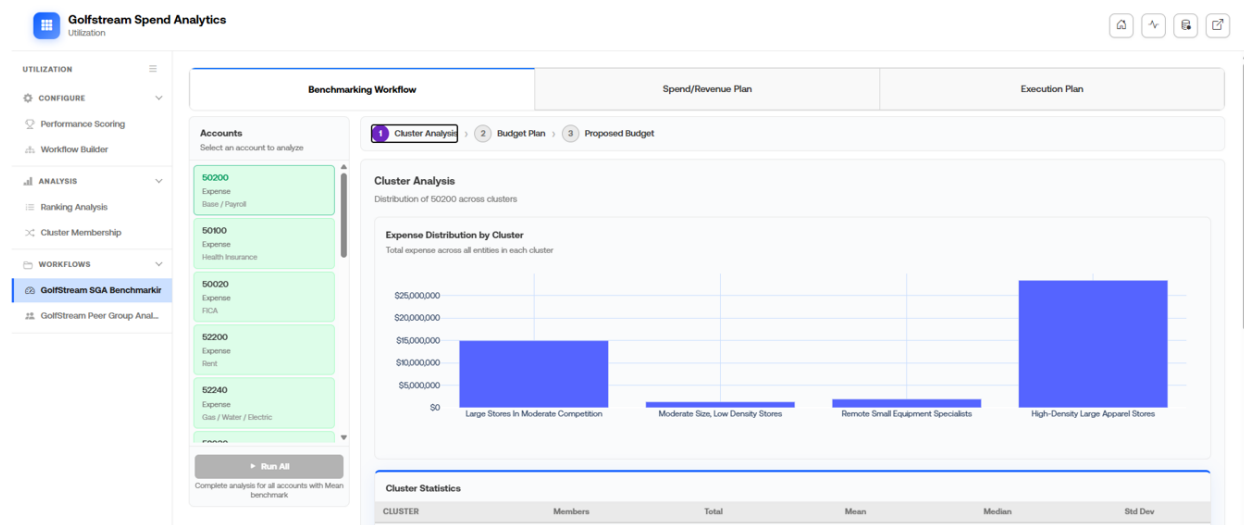
Benchmarking

The Benchmarking workflow turns peer-group analysis into a defensible budget plan. The output is an entity-by-entity, account-by-account opportunity report.

Benchmarking Workflow

Cluster Analysis

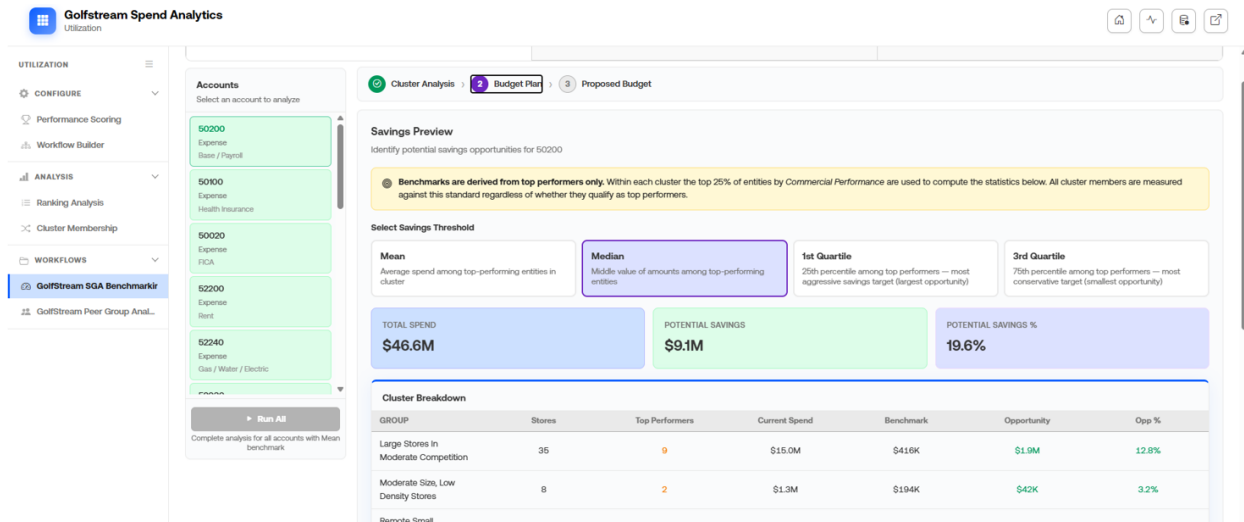
The first view shows cluster-level statistics for the selected accounts. For each cluster, it summarizes the distribution of spending or revenue across the accounts being benchmarked. This is the view that establishes what good looks like for each peer group.



Budget Plan

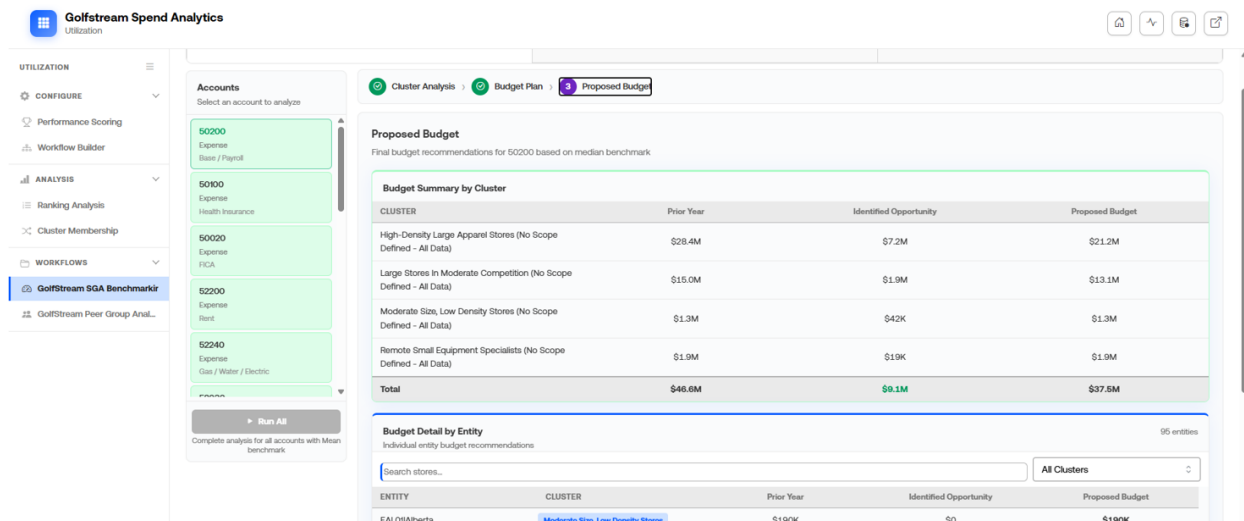
The Budget Plan view configures the level of improvement the user wants to apply. Options include matching the cluster mean, median, top quartile, or a custom percentile. The user can apply the same target to all accounts or vary the target by account.

Using Workflows



Proposed Budget

The Proposed Budget view produces the final opportunity report for the selected account, summarized both by cluster and by entity.



Completing the workflow for at least one account enables the other two tabs within the Benchmarking workflow.

Spend/Revenue Plan

This tab summarizes all the findings from the workflow tab. It shows savings opportunities both by account and by entity, enabling a quick and easy review of how the configured budget will affect the entire data set.

Golfstream Spend Analytics

Utilization

UTILIZATION

CONFIGURE

Performance Scoring

Workflow Builder

ANALYSIS

Ranking Analysis

Cluster Membership

WORKFLOWS

GolfStream SGA Benchmarking

GolfStream Peer Group Analysis

Benchmarking Workflow

Spend/Revenue Plan

Execution Plan

Spend/Revenue Plan Summary

Overview of potential cost savings and revenue opportunities across all completed accounts.

Summary by Account

ACCOUNT	Total Prior Year	Identified Opportunity	Proposed Budget	% Change
50200 Base / Payroll	\$46.6M	\$9.1M	\$37.5M	19.6%
50100 Health Insurance	\$8.7M	\$1.7M	\$7.0M	19.6%
50020 FICA	\$5.8M	\$1.1M	\$4.7M	19.6%
52200 Rent	\$21.9M	\$4.3M	\$17.6M	19.6%
52240 Gas / Water / Electric	\$7.3M	\$1.4M	\$5.9M	19.6%
52030 Advertising	\$11.7M	\$2.3M	\$9.4M	19.6%
52000 Promotions	\$5.8M	\$1.1M	\$4.7M	19.6%
51140 IT Services Expense	\$7.3M	\$1.4M	\$5.9M	19.6%
51120 Management Consulting Fees	\$4.4M	\$858K	\$3.5M	19.6%
53020	\$2.9M	\$572K	\$2.3M	19.6%

Execution Plan

The execution plan helps guide users from the budget plan agreed upon to actionable insights. On this page, the user can review particular entities' top opportunities, generate explanations for those opportunities, send emails summarizing those opportunities, and even write the results directly back to the OneStream cube.

Using Workflows

The screenshot displays the 'Golfstream Spend Analytics' interface. The left sidebar shows a navigation menu with sections: UTILIZATION, CONFIGURE (Performance Scoring, Workflow Builder), ANALYSIS (Ranking Analysis, Cluster Membership), and WORKFLOWS (GolfStream SGA Benchmarking, GolfStream Peer Group Analysis). The main content area has three tabs: Benchmarking Workflow, Spend/Revenue Plan, and Execution Plan. The Execution Plan tab is active, showing a search bar, a dropdown for 'All Clusters', and buttons for 'Generate Explanations', 'Write to OneStream', and 'Send Email'. Below this, the 'Execution Plan' section provides a summary: 'EUS10|Texas', 'Large Stores In Moderate Competition', and 'Total Opportunity: \$92K'. A 'TOP OPPORTUNITIES' table lists three items:

Item ID	Description	Prior	Current	Target
50200	Bonus / Payroll	\$445K	\$29K	\$419K
52200	Rent	\$209K	\$14K	\$195K
52030	Advertising	\$11K	\$7K	\$195K

Peer Group Analytics

Peer Group Analytics produces a scorecard for an individual entity. The scorecard is the primary output that goes to functional leaders for performance discussions, coaching plans, or business reviews.

Peer Group Analytics Workflow

This tab enables users to step through each entity, assign it to a peer group, and review its scorecard when compared against the configured peer group.

Using Workflows

The screenshot shows the 'Peer Group Analysis Workflow' interface in the 'Golfstream Spend Analytics' application. The left sidebar contains navigation options: UTILIZATION, CONFIGURE, Performance Scoring, Workflow Builder, ANALYSIS (selected), Ranking Analysis, Cluster Membership, WORKFLOWS, and Golfstream SGA Benchmarking. The main panel is titled 'Peer Group Analysis — Golfstream Peer Group Analytics' and includes a subtitle 'Compare entities against peer groups and identify improvement opportunities.' The workflow is divided into three tabs: 'Peer Group Analytics Workflow' (active), 'Score Cards', and 'Execution Plan'. The 'Peer Group Analytics Workflow' tab shows an 'Entity Explorer' on the left with a 'Grouping Type' dropdown set to 'Cluster'. Below this, a list of groups and entities is shown, including 'High-Density Large Apparel Stores' (40), 'Large Stores in Moderate Competition' (35), 'Moderate Size, Low Density Stores' (8), and 'Remote Small Equipment Specialists' (12). A green button labeled 'Save all Selections' is at the bottom. The main area on the right has a large blue arrow pointing right with the text 'Select something to get started'. Below this, there are two buttons: 'Analyze a Group' and 'Analyze an Entity'. At the bottom, a '3-step entity workflow' is shown: 1. Rankings (See how the entity ranks within its cluster and overall), 2. Peer Group (Accept the default cluster or choose a custom comparison group), and 3. Scorecard (Review performance gaps against peer group averages).

Rankings

The Rankings view shows where the selected entity sits relative to its cluster on the configured measures.

The screenshot shows the 'Rankings' view in the 'Golfstream Spend Analytics' application. The left sidebar is the same as in the previous screenshot. The main panel is titled 'Peer Group Analytics Workflow' and includes a subtitle 'Compare entities against peer groups and identify improvement opportunities.' The workflow is divided into three tabs: 'Peer Group Analytics Workflow' (active), 'Score Cards', and 'Execution Plan'. The 'Peer Group Analytics Workflow' tab shows an 'Entity Explorer' on the left with a 'Grouping Type' dropdown set to 'Cluster'. Below this, a list of groups and entities is shown, including 'High-Density Large Apparel Stores' (40), 'Large Stores in Moderate Competition' (35), 'Moderate Size, Low Density Stores' (8), and 'Remote Small Equipment Specialists' (12). A green button labeled 'Save all Selections' is at the bottom. The main area on the right shows the 'Rankings' view for the selected entity 'EUS02|Texas'. The view is divided into three sections: 'Rankings' (1. See where this entity ranks), 'Peer Group' (2. Choose a comparison group), and 'Scorecard' (3. Review performance gaps). The 'Rankings' section shows a 'Ranking Analysis' for 'EUS02|Texas' across different perspectives. It includes a 'Within Cluster' ranking of #8 of 40 and an 'Overall Ranking' of #22 of 95. Below this, a 'Top Performers in Cluster' table is shown:

Rank	Entity	Score
#1 🏆	EUS19 North Carolina	176
#2	ENL01 North Holland	121

Peer Group

The Peer Group view confirms which cluster the entity belongs to and exposes the option to compare it against an alternative grouping, such as region or business unit.

Using Workflows

The screenshot displays the 'Golfstream Spend Analytics' interface. On the left, a sidebar menu includes 'UTILIZATION', 'CONFIGURE', 'Performance Scoring', 'Workflow Builder', 'ANALYSIS', 'Ranking Analysis', 'Cluster Membership', 'WORKFLOWS', 'GolfStream SGA Benchmark...', and 'GolfStream Peer Group Ana...'. The main area is titled 'EUS02|Texas' and 'High-Density Large Apparel Stores'. It features a 'Selected Entity' button and a 'Review the 3-step analysis for this entity' link. The workflow steps are 'Rankings', 'Peer Group', and 'Scorecard'. The 'Peer Group' step is active, showing a 'Select Peer Group' section with 'Cluster (default)' and 'Region' options. Below this, a 'Peer Group Comparison' section shows 'Peer Group Size' as 40, 'Selected Grouping' as 'Cluster (default)', and 'Measures Tracked' as 4. The 'Entity vs. Peer Group Average' table compares EUS02|Texas to the peer group average across key measures.

Measure	EUS02 Texas	Peer Avg	Variance	% Variance
measure_gross_margin_pct	41.70	40.93	+0.77	+1.88%
measure_annual_rev_usd	15,559,776.00	10,313,757.70	+5,246,018.30	+50.86%
measure_annual_sga_usd	2,442,885.00	1,900,823.90	+542,061.10	+28.52%

Scorecard

The Scorecard view produces the final deliverable. The scorecard shows the entity's variance against peer benchmarks across the selected measures.

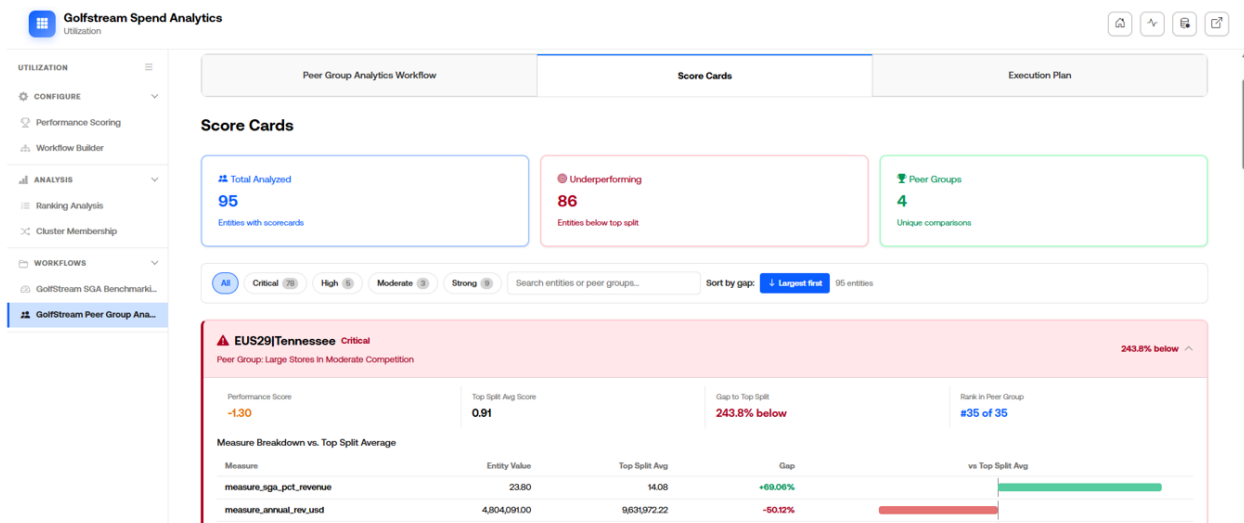
The screenshot displays the 'Golfstream Spend Analytics' interface, now in the 'Scorecard' view. The sidebar menu is the same. The main area is titled 'EUS02|Texas' and 'High-Density Large Apparel Stores'. The workflow steps are 'Rankings', 'Peer Group', and 'Scorecard'. The 'Scorecard' step is active, showing a 'Performance Scorecard' section with 'Performance Score' as 0.43, 'Top Split Avg' as 0.73, and 'Gap to Top Split' as 41.5% below. The 'Variance Analysis vs. Top Split Average' table compares EUS02|Texas to the top split average in the peer group.

Measure	Entity Value	Top Split Avg	Variance	% Variance
measure_gross_margin_pct	41.70	40.93	+0.77	+1.88%
measure_annual_rev_usd	15,559,776.00	10,313,757.70	+5,246,018.30	+50.86%
measure_annual_sga_usd	2,442,885.00	1,900,823.90	+542,061.10	+28.52%
measure_sga_pct_revenue	15.70	19.12	-3.42	-17.89%

Once all desired selections are made, select Save All Selections to enable the other workflow tabs. This will assign any un-reviewed entities to the peer group of their own cluster without overwriting any changes the users has made.

Score Cards

The Score Cards tab summarizes the findings of the workflow tab, enabling the user to review how all their entities stack up against their configured peer group at once. Users can choose to sort and filter this page, enabling them to more easily review all the workflow results at once.



Execution Plan

The Execution Plan tab takes the insights generated by the workflow and summarized on the Score Cards tab to action items. If used as part of the MBR or QBR process, this tab can enable a centralized power user or team to send out automated emails containing relevant score cards to users not within OneStream, should they so choose. In addition, for each entity, the solution will highlight other entities which are particularly similar to the chosen entity across the clustering feature set, drawing out additional learning opportunities for a given entity to take and implement in their own business.

Using Workflows

UTILIZATION

CONFIGURE

Performance Scoring

Workflow Builder

ANALYSIS

Ranking Analysis

Cluster Membership

WORKFLOWS

GolfStream SGA Benchmark...

GolfStream Peer Group Ana...

Golfstream Spend Analytics

Utilization

Peer Group Analytics Workflow

Score Cards

Execution Plan

Execution Plan

Targeted improvement plans for each entity based on their performance gap to the top percentile

Entities Reviewed
95

Underperforming
86

Above Benchmark
9 (9.5%)

Avg Improvement Opportunity
+119.5%

Search by dimension(s)

Search by Entity, region

Peer Group
All Peer Groups

Status
All Statuses

Sort by
Gap to Top Split (High to Low)

EUS29|Tennessee

Peer Group: Large Stores in Moderate Competition

Performance Score
-1.30

Top Split Avg Score
0.91

Gap to Top Split
243.8% below

Key Improvement Areas

measure_sga_pct_revenue: Entity value is 24 vs. top performers at 14 (+69.06%). This is a strength — maintain this advantage.
+69.06%

measure_annual_rev_usd: Entity value is 4,804,091 vs. top performers at 9,631,972 (-50.12%). Focus on strategies to close this 4,827,881 gap.
-50.12%

SensibleAI Clustering Analysis Guide

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Definitions

The terms below carry specific meaning within Clustering Analysis.

Cluster

A peer group identified by the clustering engine. A cluster contains entities that share similar feature values.

Cluster Set

The complete collection of clusters produced by one configuration of source data, features, and algorithm settings. A cluster set is the unit that is deployed and referenced by workflows.

Cluster Snapshot

A specific instance of a cluster set produced by running the clustering engine at a particular point in time. Drift Analytics compares two snapshots.

Drift

The movement of an entity from one cluster to another between two snapshots. Drift is classified as positive, neutral, or negative based on the Performance Score of the source and destination clusters.

Drift Analytics

The workflow that surfaces and explains drift between two cluster snapshots.

Entity

The unit being clustered. Examples include a store, plant, customer, sales rep, vendor, or product.

Feature

A column of the source data used as an input to the clustering engine. Features describe operational behavior.

Definitions

Feature Importance

A measure of how much each feature contributed to the separation between clusters. Used for validation and interpretability.

Performance Score

A configurable composite KPI used to rank entities within a cluster and to classify drift between clusters. Defined as a weighted combination of measures.

Peer Group

A synonym for cluster, emphasizing the fact that members are similar enough to compare against one another.

Peer Group Analytics

The workflow that produces a scorecard comparing a single entity to its cluster on a set of configured measures.

Benchmarking

The workflow that compares an entity's accounts against the top quartile of its peer group and produces a defensible budget plan.

Workflow

A configured combination of cluster set, Performance Score, and workflow-specific settings that produce a specific business deliverable when executed.