



Integrating people, process and IT.

## Planning Health Check



### Optimize the Power of Planning

#### Challenge

Every organization needs to be able to formulate financial plans, communicate them clearly, and evaluate results. Planning provides a holistic process for accomplishing these goals. As a tool for planning across channels and different product groups with a unified set of key performance indicators, Planning is that “one version of the truth” every company needs. Keeping this system functioning efficiently is critical to effective Planning. But how can you be certain your system is firing on all cylinders?

#### Solution

A Planning Health Check from RPE will give you the feedback you need to understand system and process effectiveness. Is your system configured appropriately? Do you have access to all the data you need to make your plans? Do your planners understand the process and the tools at their disposal? RPE will evaluate all of these factors and develop a detailed recommendation for improvement.

#### What's Involved

- An RPE consultant meets and interviews the planning team to understand practices, strategies and challenges
- RPE compares the results of the assessment to best practices in the industry and identifies opportunities for improvement
- RPE will provide a detailed Planning Health Check Report, highlighting priority issues and recommendations
- The scope of a Planning Health Check can be scaled to meet your needs, from a quick one week review to a month-long deep dive

#### The Planning Process

Planning gives an organization the ability to focus planners' tasks in a clearly defined process, from Top Down through Bottom Up plans. There are a variety of additional planning activities that can be incorporated, including Key Item Planning, Middle Out Planning, Alternate Hierarchies, etc. RPE consultants will review the overall current process and help determine what improvements can be made. Should more steps be added to deepen the plans, should steps be removed to streamline, or some combination of both? The goal is a balance between completeness and efficiency.

#### How you will benefit from an RPE Planning Health Check:

- Insight into industry leading technology and enhancements
- Identification of user training opportunities
- More effective plans for every part of the organization
- Improved system sustainability and efficiency

## Improved Configuration

In an RPE Health Check, consultants will review the configuration of the system to look for areas of improvement. The planning team shouldn't have to work around an incompletely configured system to get their job done.

When evaluating Planning, we take into consideration these questions:

- Do the planners have to reinterpret the numbers on their screen because they know "what's really happening"? This implies either that the feeds from the host are inaccurate or unstable, or the planners have an incomplete understanding of the data.
- Are there one-off plans managed apart from the rest of the organization because "they don't fit"? This could mean there are plans or plan versions defined inappropriately.
- Do the planners have to wade through options that don't apply to them? The user setup should provide each planner with a clear picture of their responsibilities. They shouldn't be tripping over unused plans or the work of others.
- Are there opportunities for improved automation? Planners or system administrators may be executing steps manually that can be automated to save them time and effort.

## The Importance of Training

We all know that training is critical to the functioning of any intricate system. We also know that time is a precious commodity and new employees are often trained on the job. Even planners who have been through formal training may not have retained everything they learned. Processes and systems change, making original training at best out of date and at worst counterproductive. RPE will take a careful look at the education level of the planning team and recommend additional training that might be indicated, whether to fill in gaps in knowledge or merely as a refresher.

## Exploring New Frontiers

An initial installation of Planning is often designed to meet known, existing needs. But with time, a planning organization may find additional benefits to be gained from expanding the scope of the data being reviewed.

A Health Check will help answer these questions:

- Would Sales Planning be more effective with access to demand forecast data?
- Is there benefit to reviewing the data used for Assortment Planning?
- Is there enough store-level data available to support Store Planning?
- Are there product attributes singular enough to justify Attribute Planning?

Leveraging the wealth of an organization's data can seem daunting, but with the right guidance from RPE, unexpected avenues of analysis can be discovered and exploited.

## The Final Analysis

Having completed a Health Check on Planning, RPE professionals will make detailed recommendations on system configuration, process improvement and training opportunities. They will evaluate your current version and make a recommendation on whether an upgrade should be pursued.



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