



Integrating people, process and IT

CASE STUDY

From Excel to Excellence: Revolutionizing Merchandise Planning and Data Management for a National Automotive Retailer

This national automotive retailer is one of the largest independent automotive retailers in the nation. With a strong commitment to customer satisfaction, the company has focused on expanding its automotive services and acquisitions and developing a growing mobile distribution channel. To support these efforts, the company recognized the need to upgrade from Excel to more integrated tools, processes and technology. This shift empowered Planners to work more effectively and efficiently, enabling improved collaboration and strategic forecasting to meet the demands of their evolving business.

Specialty retailers rely on a data-driven actionable approach, seeking insights and opportunities to steer the business towards continuous improvement, expansion and long-term success. Focus was placed on areas such as:

- Strategic Brand Planning
- Attribute/Seasonal Planning
- Store Planning
- Custom Sales Variables and Metrics

RPE developed a future process with detailed, customized meeting charters, planning calendars per associate role, and industry best practice pre-season and in-season planning processes to leverage today's business needs and elevate tomorrow's opportunities.

Forming an Achievable Project Vision

Without a doubt this automotive giant was diligent in defining their needs and requirements with a multi-year journey to support their Financial, Assortment and Demand Planning goals. Merchandise Planning would be

KEY FACTS

Client: National Automotive Retailer
Number of Stores: 1,200+ US,
wholesale (fleet)
Project Duration: 15 months

OBJECTIVE

Give Planners the tools necessary to move from Excel to a Merchandise Planning solution that seamlessly integrates with existing Demand and Data Management solutions and allows Forecasting by Channel and Brand.

SOLUTIONS

- Planning
- Data Management

SERVICES

- Project Management
- Software Design
- Implementation
- SIT and UAT Execution
- Change Management
- Process Improvement
- Documentation and Training

“Thank you for getting us off Excel. One more death to Excel. You will make our lives much easier as we are sharing out plans for the business.”

Senior Manager of Sales and Assortment

defined as the foundational lynch pin of their Planning solution architectural suite, with Demand Planning already in place.

RPE collaboratively spent several weeks addressing those requirements highlighting what could and could not be delivered within budget and on time. RPE, along with many cross functional partners, spent the time necessary defining the Future Process, Gaps and Customizations needed to support the design and build of the solution. This included “live” system demonstrations of “to-be” customized flexing calculations before signing off on the build.

To quote one of the Project Leads, “Thank you for the dedication and work effort that RPE has shown to make our vision a reality. We asked for something that conceptually made sense, but systematically wouldn’t work. RPE was able to level set our big dreaming into realistic dreaming to build a solution that checks all our boxes. You laid the foundation for the next steps which is critical to us to make more dreams come true.”

“I feel what truly separated this team from most was the level of care. It was so evident and was translated into going the extra mile. Thank you. It wasn’t just a matter of dedication it was the care element that truly created the difference.”

Lead Project Manager

The Quest for Data Excellence

With a complex, multi-channel business, data will always be a challenge. Ensuring everyone is working with the “cleanest” information becomes a top priority. The team understood all too well the expression “Garbage In, Garbage Out”, and it became the mission to address the data.

This data cleansing process utilized advanced filtering techniques and data normalization methods to retain only relevant, high-quality data points. Furthermore, a comprehensive data redefinition strategy was employed to establish clear criteria for what constituted “good” data versus “company managed” data. This redefinition was essential for improving the quality of the data used for Forecasting, enabling more accurate and timely updates to predictive models.

Benefits of this approach:

- User experience significantly improved allowing Users to more easily navigate the system as well as have more time for performance analysis
- Data load times significantly reduced, allowing Planners to forecast at a more accurate lower level
- Storage requirements optimized to provide improved system responsiveness and performance

This ultimately streamlined the Forecasting process, providing more reliable and actionable insights for decision-making.

The Project Sponsor summed it up this way, “We have a high standard in our quest for excellence and you helped us get there. It wasn’t always easy. You pushed us a little out of our comfort zone, which isn’t a bad thing. It was good to have different thoughts and approaches. Thank you for pushing our buttons and for your diligence to make the pointed conversational efforts.”

Change is the Only Constant

Together RPE and America’s largest automotive retailer established a comprehensive framework to guide the change process, starting with the creation of Meeting Charters. These charters were designed to define key

objectives, set expectations and assign responsibilities clearly. RPE identified who was accountable for driving specific tasks, who was responsible for executing them, and who needed to be informed of progress but not actively involved in the day-to-day execution. This structure ensured that everyone understood their role in the process, fostering alignment and promoting a sense of ownership and accountability across the organization. As a result, the Change Management process remained organized, transparent, and efficient, ultimately leading to successful outcomes.

To quote the Director of Change Management, “The highest compliment we can give is to say it won’t matter which vendor we go with for our next solution. RPE will be the Change Management resource we bring back to lead us.”

Instructor Led Training

The on-site detailed training for both User, Admin and read-only Users helped them envision how to take advantage of the new Planning solution and to fully understand and maximize features. This 300+ page customized training manual, along with weeks of RPE’s “Tell Me, Show Me, Let Me Try” teaching methodology teaching is the gold standard that sets RPE apart from other cookie cutter vendors.

A quote from RPE Senior Functional Lead, “There was heavy value in training with pre-identified ‘areas in the hierarchy’ where data or assortment expansion was a large portion of the plan and accomplishing thoughtfully constructed financial plans with either sparse data, little to no history, or store expansion loaded into the strategic intent.”

Accelerating Success

RPE was brought in to help optimize the Financial Planning potential for a company looking to improve its overall operations. The team at RPE worked hand-in-hand with the organization, taking the time to truly understand specific needs, challenges and goals. This collaborative approach led to the development and implementation of a tailored Merchandise Planning system designed to support their vision and drive success.

With Planning in place, the company gained greater visibility into its inventory, more accurate sales and margin forecasting, and a future-proof planning process. This will allow the organization to respond quickly and confidently in an ever-evolving market, helping them to stay ahead and achieve their goals with greater ease and efficiency.



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