

INTEGRATED BUSINESS PLANNING

Configurable, Long-Range Collaborative Planning

Praveen Padman

Rod Daugherty

Santhosh Srirambhatla



BLUEPRINT 2019
PLANNING FOR A FLEXIBLE FUTURE

WHAT IS IBP?

Integrated Business Planning

- A formal process led by senior management that on a monthly basis, evaluates time-phased projections for new products, demands and resulting financials
- Is a decision-making process to ensure the tactical plans in all business functions and geographies are aligned and in support of the companies' strategy
- A Process to reach consensus on a single operating plan, which allocates critical resources to most effectively and profitably meet customer's needs
- Cross functional involving Top Management, Sales, Supply and Purchasing



WHAT DOES IBP DO FOR YOU?

ONE PLAN ONE COMPANY

Provides a singular view and visibility across the company.

COORDINATES ALL DEPARTMENTS

Conveys plans horizontally across functions and vertically by department

DELIVERS A REALISTIC PLAN

Cross-functional involvement provides a reality check, what we can and cannot do
Interactive process results in individual ownership of the plan

LINKS STRATEGIC BUSINESS PLAN AND OPERATING PLAN

Shows areas where the Operating Plan has deviated from the Business Plan
Verifies the Business Plan in common units and in dollars



INTEGRATED BUSINESS PLANNING – LEVEL SETTING

PART OF BLUE RIDGE SCP

TRUE TO OUR DNA AS:

Cloud native solution

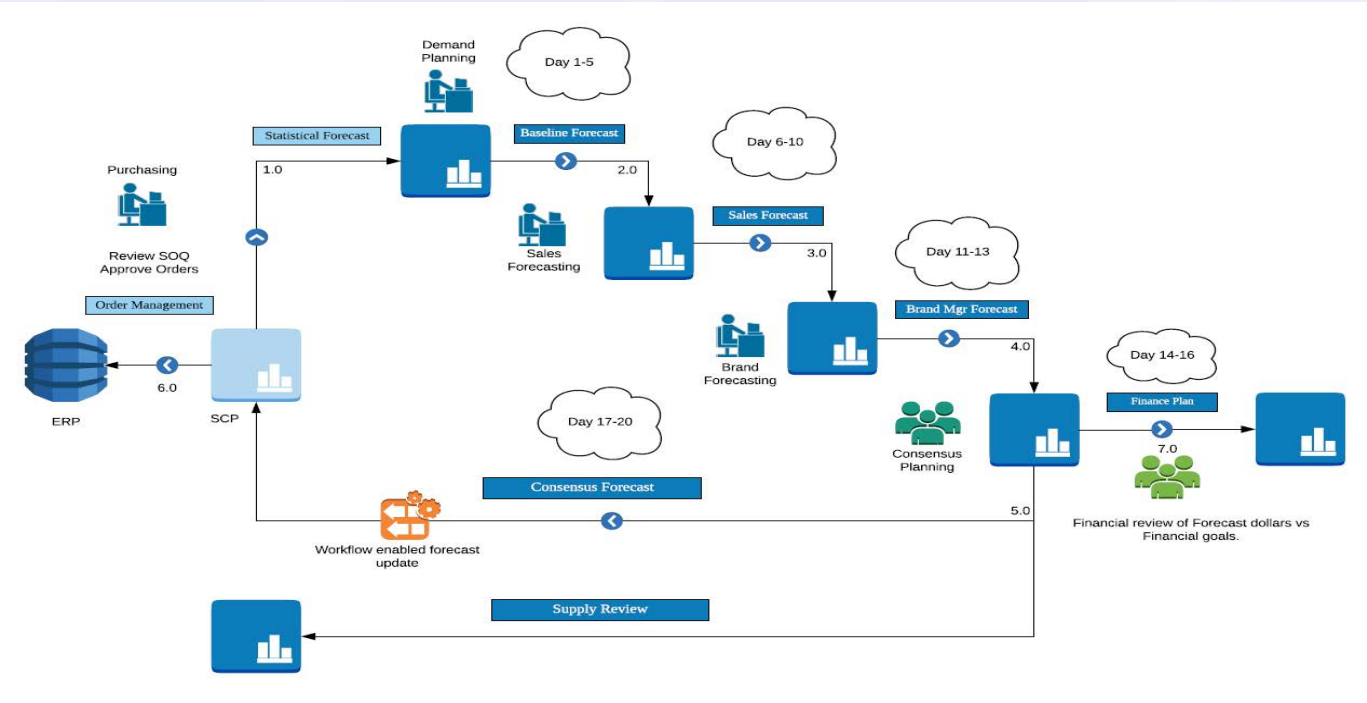
“App-like” simplicity

Quick to implement
(compared to traditional competitors)

Embedded into a single platform.

**DESIGNED AND BUILT TO
LEVERAGE SCP DATA**

TYPICAL IBP PROCESS FLOW



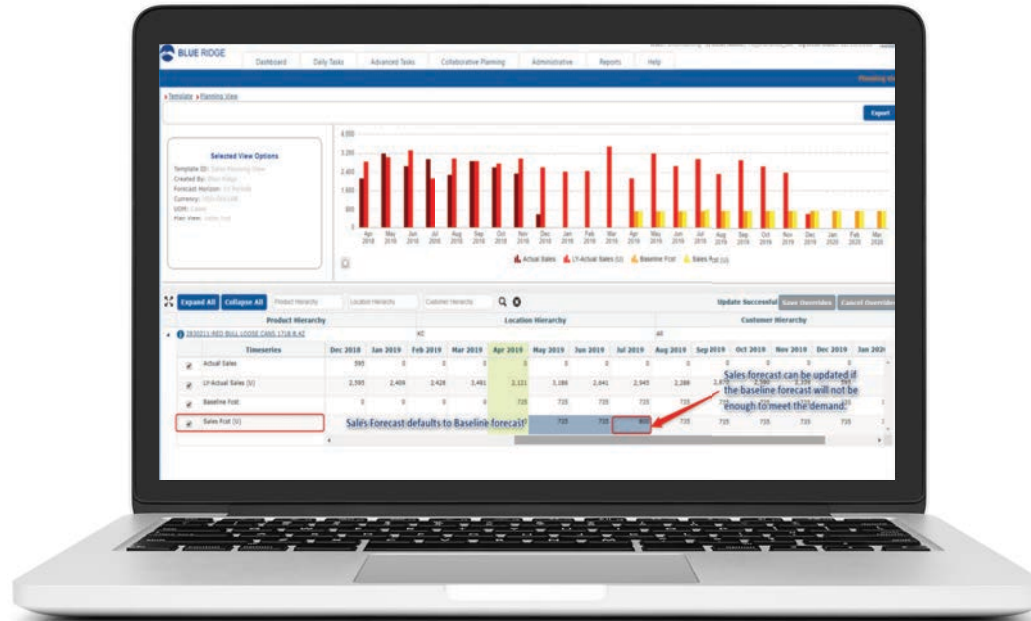
BLUE RIDGE IBP PROCESS FLOW – BREAKDOWN

Demand Planning / Baseline Planning – This is SCP activity where the Demand Planners would perform the ‘Demand Cleansing’ to ensure the system generates the proper forecast which in IBP terms would be called as ‘Baseline Forecast’

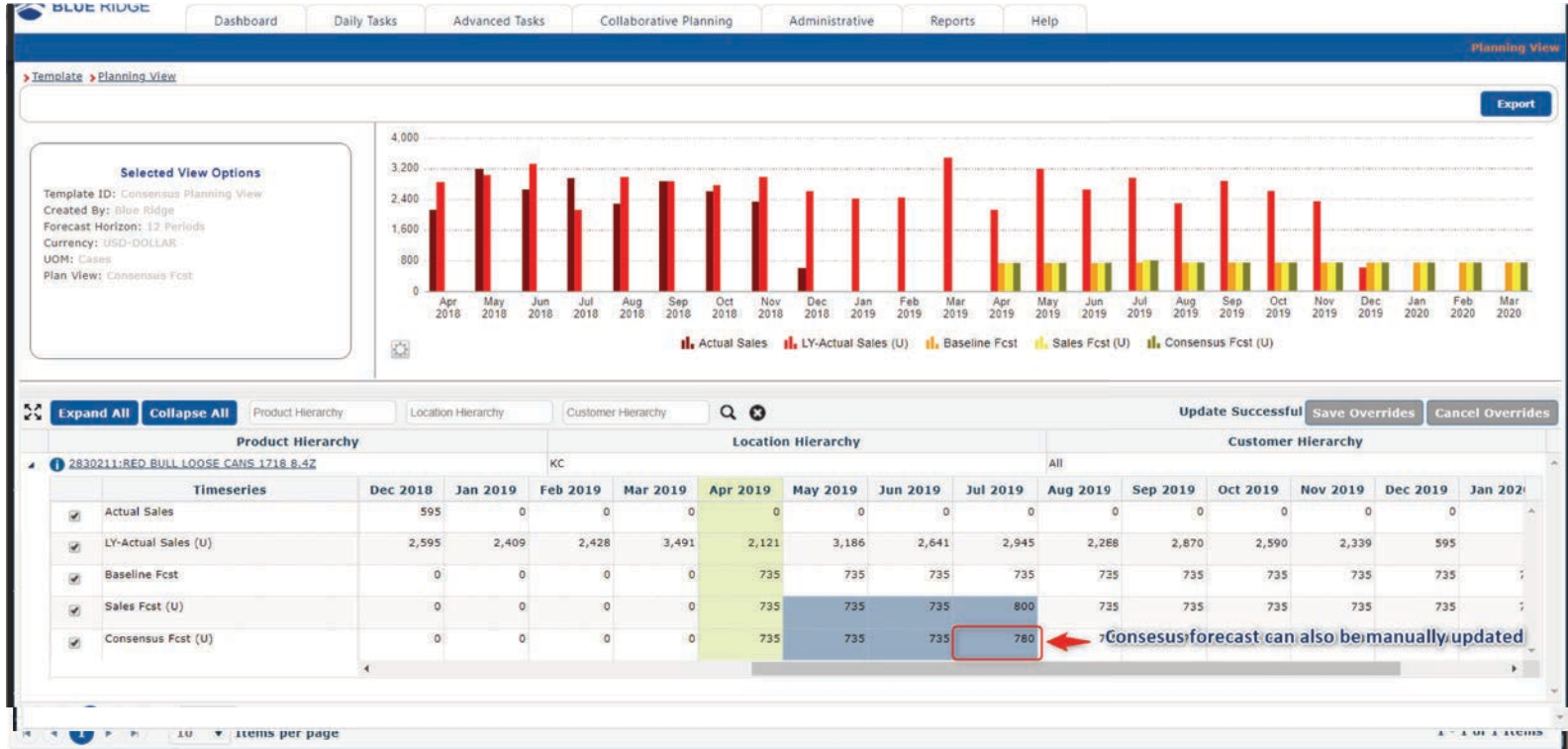


SALES FORECASTING:

Sales team will have the ability to input their forecast without disturbing/updating the baseline forecast. Forecasting can be done in Volume (Units) or Value (\$).



CONSENSUS FORECAST



IBP TO SCP FORECAST UPDATE:



FUNDAMENTALS OF IBP (COLLABORATIVE PLANNING)

HIERARCHIES

Hierarchies are a structure by which to categorize, change, aggregate and dis-aggregate planning information.

TIME SERIES

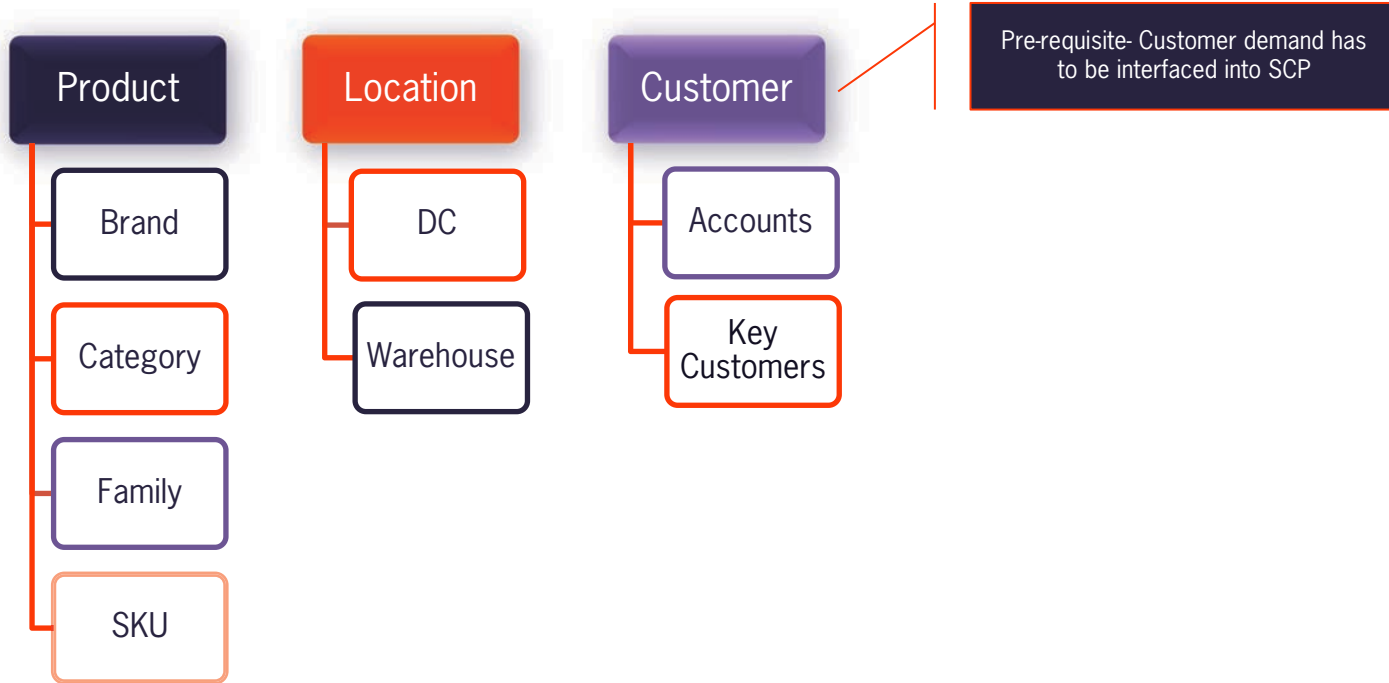
A time series is a time phased set of values or data points.

PLANNING VIEWS

Planning Views allow users to view information and submit Forecasts.

HIERARCHIES

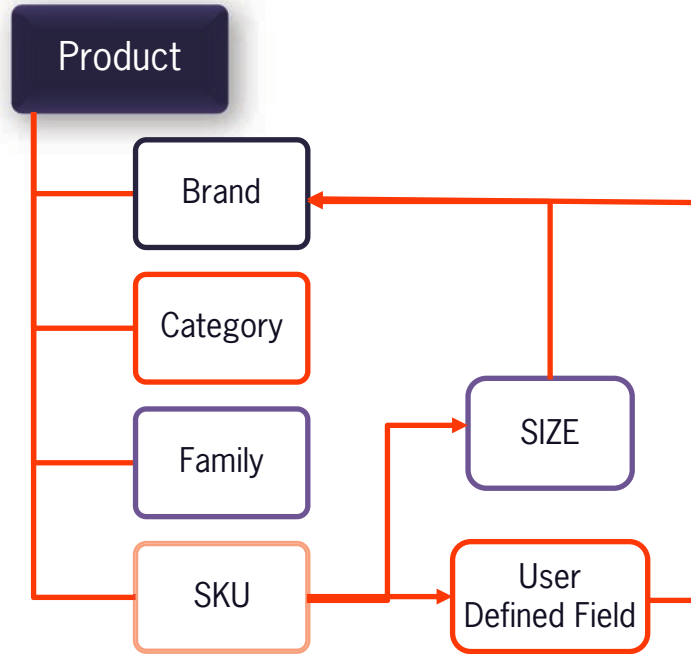
ALL "DATA" IS ANCHORED IN THE HIERARCHIES



HIERARCHIES

Blue Ridge Hierarchies can be setup as non linear if needed.

There is no constraint as long as the level is applicable to forecasting.



TIME SERIES

A structured way to summarize data which enables storing values over time intervals or periods

Types of Time Series



Loaded ▶

Data is either loaded as a interface or interfaced through SCP. ▶

- ✓ Actual Sales
- ✓ Demand History
- ✓ Open orders
- ✓ Baseline Forecast



Calculated ▶

Data is calculated using simple business rules. ▶

- ✓ Last Year Actuals
- ✓ Forecast accuracy

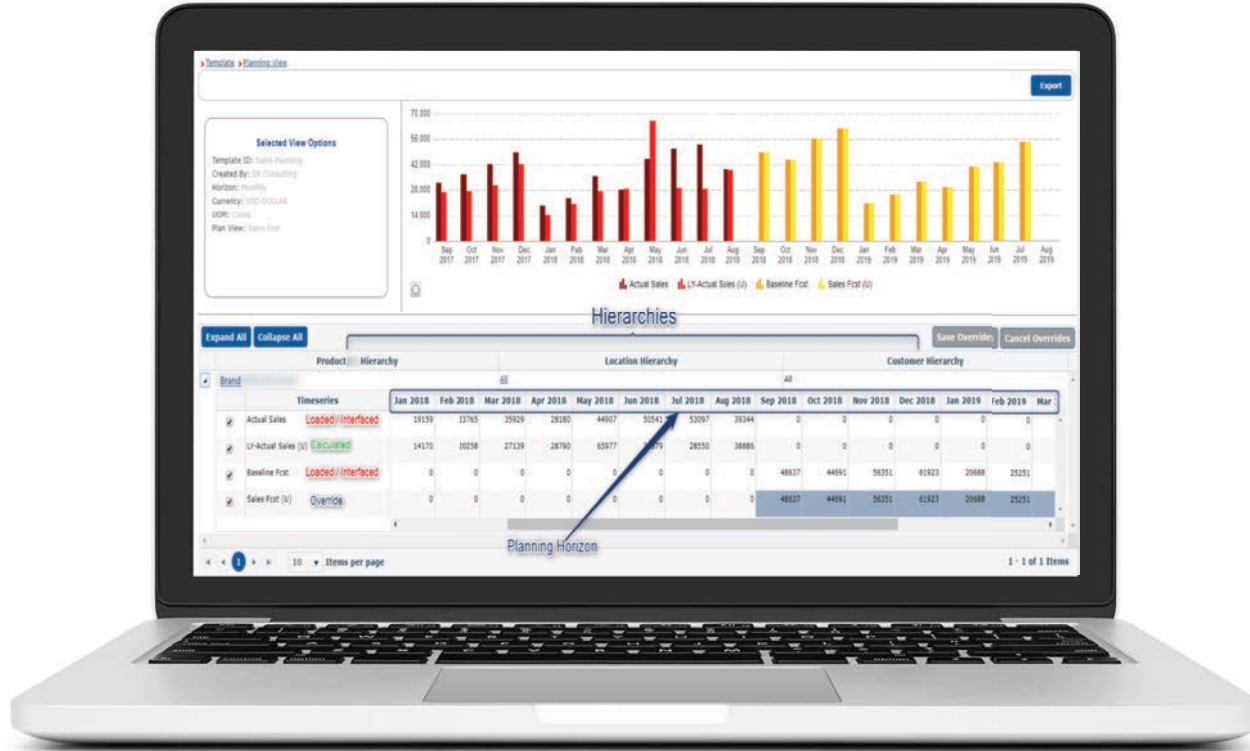


Override ▶

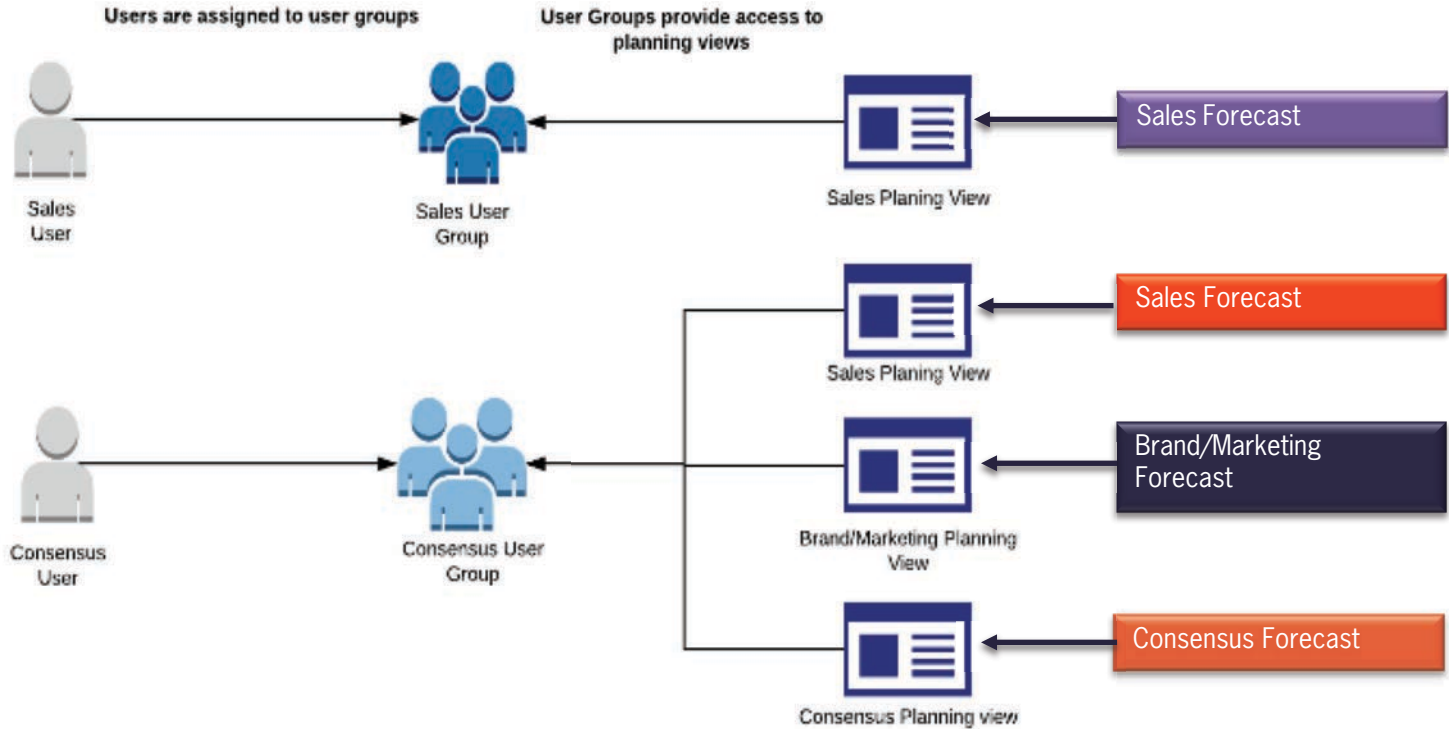
Manually updated data set. Can default to a time series or can be 0 to start with. ▶

- ✓ Sales Forecast
- ✓ Demand Planner Forecast
- ✓ Consensus Forecast

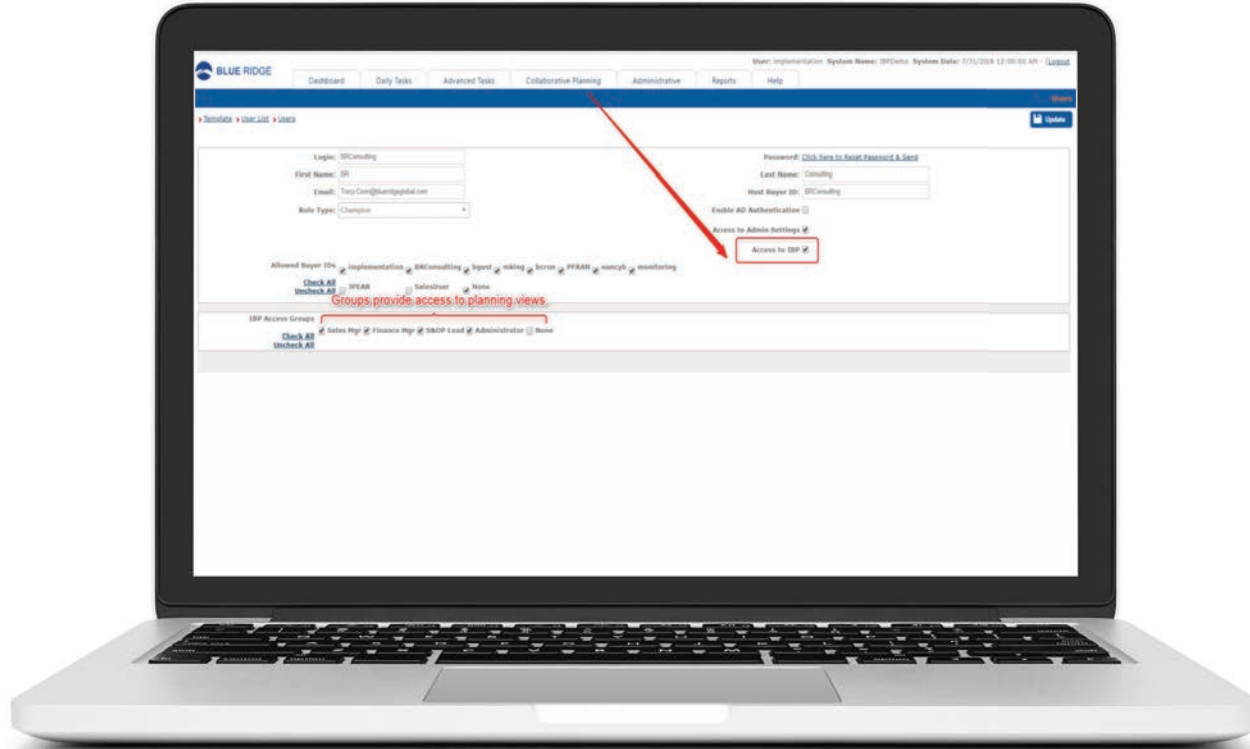
PLANNING VIEW



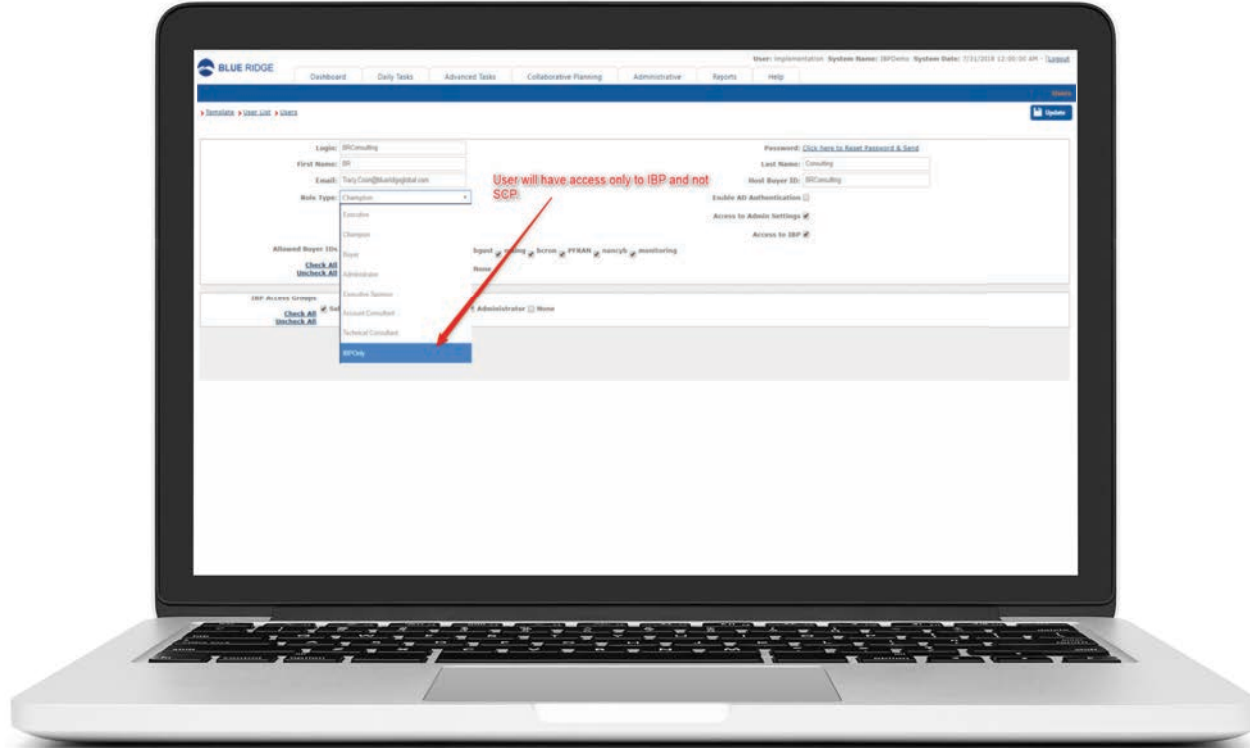
USER ADMINISTRATION



USER PERMISSIONS



USER PERMISSIONS - CONTD



USERS WITH SCP & IBP ACCESS

BLUE RIDGE User: Implementation System Name: IBPDemo System Date: 7/31/2018 12:00:00 AM - [Logout]

Dashboard Daily Tasks **Collaborative Planning** Administrative Reports Help

Template Template

+ Add New Template

No Filters Selected

Template ID	Description	Product Level	Location Level	Channel Level	Last Updated	Currency	UOM	Horizon	User Name
Sales Planning	Sales Planning	Brand	All	All	09/05/2018	USD-DOLLAR	Cases	Monthly	Sales King
Demand Planning	Demand Planning	Brand	All	All	08/08/2018	USD-DOLLAR	Cases	Monthly	Blue Ridge
Finance Review	Finance Review	Brand	All	All	09/14/2018	USD-DOLLAR	Cases	Monthly	Blue Ridge
Consensus View	Consensus View	Brand	All	All	09/14/2018	USD-DOLLAR	Cases	Monthly	Blue Ridge

USERS WITH ACCESS TO IBP ONLY

BLUE RIDGE User: ppadman System Name: IBPDemo System Date: 7/31/2018 12:00:00 AM - [Logout]

Collaborative Planning

Template Template

+ Add New Template

No Filters Selected

Template ID	Description	Product Level	Location Level	Channel Level	Last Updated	Currency	UOM	Horizon	User Name
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TEMPLATE MANAGEMENT

BLUE RIDGE User: implementation System Name: IBPDemo System Date: 7/31/2018 12:00:00 AM - [Logout]

Dashboard Daily Tasks Advanced Tasks Collaborative Planning Administrative Reports Help

Template Template

+ Add New Template

No Filters Selected

Template Manager

Cancel Update

Template > Template Manager

Template Details

Template ID:	Sales Planning	Assign To:	Select user...	Created Date:	07/08/2018
Description:	Sales Planning	Sales Channel:	All	Modified Date:	27/09/2018
Plan View:	Sales Fcst	UOM:	Cases	Remarks:	
Product Hierarchy:	Brand	Currency:	USD-DOLLAR		
Location Hierarchy:	All	Created By:	Sales King		

Template Defaults

- Sales Fcst
 - Select option...
 - Demand Planning
 - Sales Fcst**
 - Consensus Fcst
 - Finance
- Brand
 - Select option...
 - Brand**
 - Item Id
- All
 - Select option...
 - All**
 - Warehouse
- Channel
 - Select option...
 - All**
 - Channel
- Select user...
 - Blue Ridge
 - BR Consulting
 - Praveen Padman
 - Sales King**
 - Tracy Coon

TEMPLATE MANAGER – CONTD...

Template Defaults

Product Hierarchy Section

Activity Code:

Velocity Code:

Supplier ID:

Item Id:

Buyer:

POG:

Merchandise Class:

Buyer ID:

Brand:

Country Origin:

Vendor Name:

Source Group 1:

Source Group 2:

Source Group 3:

Location Hierarchy Section

All:

Warehouse:

Channel Hierarchy Section

Channel Name:

Group 1:

Group 2:

Group 3:

Group 4:

Group 5:

Group 6:

Attributes interfaced from SCP with multi attribute search option

Users/Admins can filter data that needs to displayed in the planning views.

Exception Based Planning

WORKFLOWS

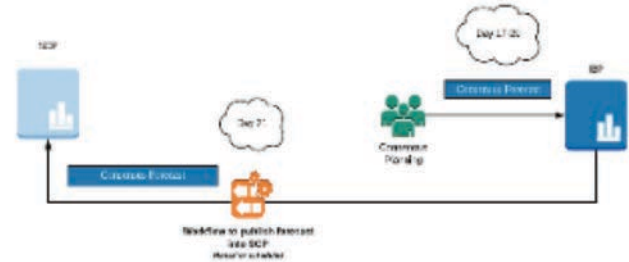
Interface Sync :
Baseline forecast sync from SCP to IBP



Forecast cadence controlled via



Forecast : Forecast cadence controlled via workflow



THANK YOU

