Making Sense of Joined Up Planning

WHAT IS JOINED UP PLANNING?

Most retail businesses have a variety of plans and budgets.


In traditional retail businesses these plans are often created in discrete planning environments, resulting in several versions of the same data existing at one time.

Joined up planning is a strategy that says that plans should be created and maintained by those best placed to make the forecasts.

Plan data should then be integrated, so that, for example, the sales and margin forecasts in the financial budgets would be sourced from the merchandise plan.

Version control allows departments to accept reforecasts as required.

The result is an integrated, real-time planning process that allows the corporate strategy to be translated consistently into tactical action across different functional areas.

WHO IS DOING IT?

The Planning Factory have implemented Joined Up Planning solutions in retailers as diverse as Thresher Group, Kurt Geiger and Jewson.

“This is a powerful business asset, and its implementation has saved Thresher Group manpower and, as a result, increased revenue.”


HOW CAN YOU DO IT?

Joined Up Planning is a strategy, not a system.

However, we have found that by using a common tool set across the different planning areas we can eliminate many of the issues that otherwise impede integration.

We recommend the use of the Applix TM1 multi-dimensional database, as used by over 50% of the US Fortune 500 companies. This allows fast, flexible and cost effective implementations.

The Joined Up Planning concept can be applied to any plans within the business that share common data elements and levels.

For most retailers the starting point is financial budgeting.

A logical next step is to move towards merchandise planning or human resources planning.

From both of these plans links can be created to other areas like logistics, retail operations and IT planning.

You may be surprised to discover that you can create robust but flexible joined up plans that you can develop and maintain yourselves.
# Making Sense of Joined Up Planning

## WHAT ARE THE BENEFITS?

- Single version of the truth across your business
- Planning completed by the most appropriate people
- Reduction in planning effort resulting from greater efficiency
- Common systems approach requires less maintenance
- Planning skills are transferable across the business
- End-user maintenance reduces costs and increases flexibility
- The flexible planning environment means process changes are easily built in
- Easy integration with tools like Excel results in increased productivity and reduced training requirements.
- Increased ROI resulting from fast implementation and low cost of ownership

## WHERE CAN IT BE USED?

Joined Up Planning can be used in any area of the business.

The only requirement is that there is shared data at a common level.

It can also be used to bring together and consolidate plans from companies within the same group.

## TECHNOLOGY REQUIREMENTS

- Jedox Palo Multi-dimensional database
- Microsoft Excel spreadsheet
- Internet Browser (optional)
- NT / Unix Server
- PC clients running Windows 32 bit

## CONTACT DETAILS

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