

Fox Collaborative Planning

An overview of how the Fox Modules work together to create a true Collaborative Planning System.

Account Planning

This is the heart of the system and is where the annual plan for an account is created, approved and managed. In addition to providing individual plans, it provides multiple aggregations of all the account plans in a "bottom-up" view of the business. Conversely, the system can take a company or channel target and drive it down to account level delivering individual account targets that can be based on channel or retailer growth. This "top-down" approach completes a tightly linked process, which ensures that everyone is working to the same plan and same set of known targets.

The tools for Account Planning are, in a business process sequence:

- **Non-Promoted Planning** – The base for any plan starts with the non-promoted sales, which is then combined with Promotional Event Planning.
- **Event Planning** – The next stage is overlaying the Promotional Events, where individual events are defined in terms of sales, spending, tactics and accruals needed to support them. These combine with the base to complete the sales and spending picture.
- **Promotional Simulation & Evaluation** - Using a history of promotions and the uplifts achieved through various tactics; each Promotional Simulation is scorecarded at total and sku level helping to build a profitable event by using the right mix of tactics and spending levels. Post-Promotional Evaluation then compares actual performance and ROI to those planned.

- **Reporting** – From customer P&L's to Gap analysis and volume tracking the reporting menu provides all levels of detail to the whole business. The sales team has the information on a daily basis to drive the most profitable sales and deliver versus very visible targets. Sector Managers can drill down to Individual team members and Accounts to help manage their performance. Management have a compiled set of numbers providing the Sales and Profit outlook for the rest of the year.
- **Daily Sales** – Displaying invoiced sales and open orders by customer down to sku level allows you to project where you will close the month. Under and over performance is easily found allowing contingency plans to be put in place to ensure targets are met.
- **Invoice Matching** – When invoices are received to be coded the system delivers a simple, paperless invoicing tool that allows you to manage payments and hence accruals helping to reduce aged debt. It provides easy interrogation of coded invoices in the event of audits and removing miss-coding issues.
- **Product Catalogue** – The final piece to the jigsaw is a database that stores all of your product information from barcodes, dimensions and waste packaging to pallet specs and images. The system can then output the data to retailer new line forms, error free at the touch of a button saving hours of work. Finally delivering 'One' single source and access point for all product information.

Fox brings state-of-the-art business process but does not require major system change. It's a simple to use solution that can be mastered in a day working at the heart of every area of your business providing great information that allows you to make better decisions.

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