

# Fox Collaborative Planning

## Forecasting and Planning

An overview of the Forecasting and Planning tools and how they make planning, managing and tracking your sales simple.

## The Planning Process

Planning is the starting point for any business in understanding what it wants to achieve and how to go about achieving it. Every business has a slightly different process and implementing systems can sometimes fundamentally change long standing methods. The Fox system allows businesses to plan their sales in multiple ways ensuring those processes need not change, although where companies want to add process the system can help to do this.

## Bottom Up Sales Planning

Bottom Up planning is the most commonly used method as it is deemed to be the one most likely to deliver a realistic plan. There are drawbacks though in allowing a Sales team that is usually bonused on delivering a plan to create that plan. However, as long as guidance is given, a steer is taken from prior years and Management push the number to be 'challenging' then you will deliver a realistic plan for the business.

- **Non-Promoted Planning** – The base for any plan starts with the non-promoted sales. The systems tools allow you to use a prior year volumes and pricing by Sku and Account to give a sound starting point. Account Managers can review 3 prior years monthly volumes along with current base rates to build the plan.
- **Event Planning** – The next stage is overlaying the Promotional Events, where events are defined in terms of sales, spending, tactics and accruals needed to support them. The system tools allow you to allocate budgets by brand and sku to each Account. The Account

Managers have the ability to build their promotional plan at event level. Where the budgets are exceeded they can receive warnings or be blocked from spending over their limits. These events combine with the base to complete the sales and spending picture.

## Bottom Up Marketing Planning

A Bottom Up method but one that is built by the Marketing team who have an expectation level of growth in the market through their knowledge of product launches and competitor activity.

- **Non-Promoted Planning** – The difference to the Sales team building the base is to allow Marketing to use the allocation tools to automatically overlay growth expectations by brand and sku down to Account level. This means a base plan can be built quickly with fewer reasons not to build a 'challenging' plan from the start.
- **Event Planning** – The Event planning can then be carried out by the Account Managers who build the promotional plan in the same way as 'Bottom Up sales Planning'.

## Top Down Planning

This is the quickest way of building a plan which can be carried out in hours rather than weeks.

- **Non-Promoted Planning** – The Management team agree a growth or decline target for the company, by brand or sku if required, and use the allocation tools to spread the target across the Account base. This can be based on prior year sales or a topline number that is split by retailer or channel market share.
- **Event Planning** – The Event planning can then be carried out by the Account Managers or Finance who build the promotional plan in the same way as 'Bottom Up sales Planning'.