

# Dynamic Planning - Revenue Planning by SKU

Leveraging Planful's dynamic planning to model sales across SKU levels.



Case Study

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## Solution

Dynamic planning is not restricted to the same dimensionality as the structured planning tenant. This allows the normal functions of workforce, OpEx, and balance sheet planning to happen in structured planning without needing to stretch the platform with unnecessary sales dimensions.

A model in dynamic planning creates a place for FP&A and sales operations to create a dataset tailored to the needs of the business process. In solutions we have created for many clients, we build models to plan at large scale dimensions for customer, product (SKU), and geography (think 50,000+ unique members).

These models give users the ultimate flexibility in the detail at which they prepare the budget. Leveraging dynamic modeling report functionality called cascade reporting – users are able to build input templates that dynamically update when changing point of view filters.

Also, external source models in dynamic planning allow for the import of sales actuals from databases that do not get loaded to structured planning. Many organizations use alternative systems to manage sales data (i.e. Salesforce) before data gets normalized into their ERP. The dynamic planning platform allows for this sales data to be stored and used in the planning process with transaction level detail for drill through. Invoice numbers can be retrieved directly in the system without having to manage the model.

CFO Solutions has also created a proprietary Excel add-in that allows for users who are not licensed for Planful to load data to help with the budgeting

process. This empowers non-Planful users like those in operations to submit budgets for approval with minimal training. This frees Finance from having to collect data files to aggregate and load into the system. The proprietary Excel add-in allows for real time uploads of data directly to the dynamic planning model thus saving time in the budgeting process.

## Impact

CFO Solutions is the premier implementor of Planful's dynamic planning platform. Not only has CFO Solutions been partnering with Planful for over a decade – they were one of the few partners in the space when Planful (then Host Analytics) introduced the dynamic planning platform five plus years ago. They had the first certified Planful partner professional, along with a team of other Planful partner certified professionals.

CFO Solutions' experience with dynamic planning across industries is unmatched. From manufacturing to pharma to services, CFO Solutions has deployed solutions that clients have relied on for years. To the point where CFO Solutions' original Planful customer, who was implemented over a decade ago, deployed dynamic planning to their organization across the globe.

The expertise and value that CFO Solutions can bring to any organization deploying or improving a Planful platform is unrivaled. As the Planful platform grows and changes as typical cloud solutions do, you can be assured CFO Solutions is committed to understanding how improvements to the platform can better our clients' success. CFO Solutions has a team of full-time consultants ready to tackle any of your business's challenges.

## Challenge

Clients typically struggle to migrate the revenue planning into Planful structured planning due to the restraints on dimensionality. Normally, the level of planning needed to comprehensively plan revenue is done at a more detailed level than the GL level setup in a typical tenant.

For example, companies need to plan revenue at the product (SKU) and sales geography dimensions, but these are ignored in a typical GL string because 95% of GL data is not mapped to these dimensions. Accounting might discount the importance of bringing these dimensions into a typical EPM platform. However, they are vital in the revenue planning process.

When clients setup structured planning tenants, they tend to focus on only the accounting dimensions even if FP&A are involved. This ignores the importance of being able to plan at the required level needed for revenue – revenue might not be the largest part of the dataset, but in the end, it is the most important part of any business.

This is where Planful's dynamic planning can bridge the gap.

