

Planning Process Considerations

Process Components to Consider

- Who should be involved in the process?
- What type of plan/forecast should I use?
- What is the source of the base data and input data?
- What level of detail makes sense to forecast the business?
- Who will be the main consumers of the results of the planning process?
- How will the results be delivered?

Who Should be Involved

The following would typically be involved

- Finance/Accounting as the core of the Planning team
- Key business stakeholders for inputs
- Senior Management for review and decision making

Additional involvement depends on a number of factors

- Timing and complexity of the business model
- The planning methodology being used
- Turnaround time required for the planning cycle
- Understanding of the business by the Planning team

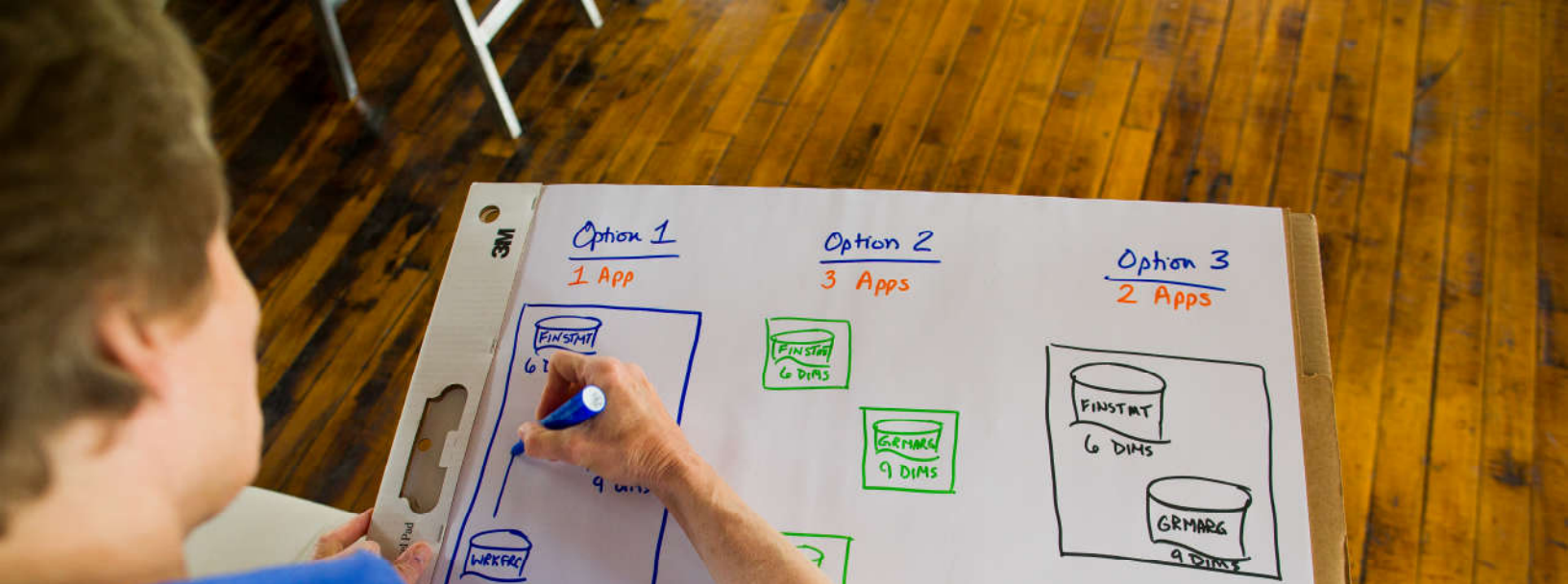


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Excel vs. Systematic Planning Solution

Excel Solution

- Many tasks can be automated with macros and VB scripts
- Dissemination of historical data and submission of plan data is done manually via email
- Difficult and time consuming to consolidate results
- Version control can be problematic and quick turnaround times of versions can be challenging
- Lack of visibility into methods used by business to derive values
- Complexity of business model and organization impacts viability of using Excel

Systemic Solution

- Allows more structure to be enforced in the process
- Centralized control of versions, reporting and analytics
- Historical data can be centrally loaded and quickly made available to users
- Timely consolidation of data resulting in quicker turnaround times
- Can develop and automate sophisticated calculations and analysis
- Requires that functionality be built and maintained

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