Scoping Questionnaire

DEMAND PLANNING

Demand Planning Org

SCOPING QUESTIONNAIRE

Demand Planning Organization

Λnaplan

- ☐ What granularity of the product are you forecasting? (e.g. SKU, product, family, demand forecast units)
- ☐ What is the time period of your forecast? (e.g. weekly, monthly, quarterly, etc.)
- ☐ How many time periods in the future do you forecast for (e.g. 12 months)?
- ☐ How frequently (percentage of product line per year) do you introduce new finished products? Will like-modeling and phase-in/out functionality be required?
- ☐ When launching a new product, does it "supercede" the previous version of a product? If so, how do you plan demand for that product?
- ☐ Does the process vary by product type or product family or channel? If so – how?
- ☐ What is typical cycle time for updating a demand plan? How frequently is it performed?
- ☐ What is your organization's availability and commitment for project resourcing?
- ☐ What is the current accuracy of your demand forecast? What is the goal?
  - ☐ For category
  - ☐ For product / product family
  - ☐ For SKU
- ☐ How is performance / bias measured across the business?
- ☐ How confident is the business in your demand planning process? What would the team like to see done differently?

Data

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Data – Source

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- ☐ How many years of historical data is available to you?
- ☐ What independent sources of demand do you consider?
- ☐ Where does the following data come from and their volume and frequency you need in the model?
  - ☐ Historical demand
  - ☐ Trade and promotion data
  - ☐ Forecasting outputs from finance, sales and/or marketing
- ☐ For each of the following category hierarchies:
  - ☐ Products
  - ☐ Organization
  - ☐ Customer
  - ☐ Distribution centers
  - ☐ Distributors
  - ☐ Point of sales
  - ☐ Suppliers
  - ☐ Geographies / regions

- ☐ What are your source systems?
- ☐ What is your current frequency of updates?
- ☐ How many items are in each hierarchy?
- ☐ How many levels are in each hierarchy?

Data – Output

- ☐ What are the organizations that will receive your consensus forecast demand data?
- ☐ What are the critical reports that will be required?
- ☐ What are the systems of record for your consensus forecast demand data?
- ☐ What level of granularity is required for your consensus forecast demand in regards to the following categories:
  - ☐ Products
  - ☐ Organization
  - ☐ Customer
  - ☐ Distribution centers
  - ☐ Distributors
  - ☐ Point of sales
  - ☐ Suppliers
  - ☐ Geographies / regions
- ☐ What is your current frequency of updates?

Configuration / Rules

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Configuration / Rules

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- ☐ Do you use multiple methods of forecast for specific products, product groups or families?

- ☐ Does you have dead periods? If so, what are they?

- ☐ What metrics do you use to measure the accuracy of your forecast? (e.g. MAPE, WMAPE, AMD, Pct Error, etc.)

  - ☐ Are the metrics measured based on function (e.g. marketing, sales, planning, NPI, etc.)?

- ☐ Do you make adjustments to your forecast based on trade and promotion plans as well as other disruptions to your plans?

  - ☐ How do demand planners override statistical forecasts or provide updates based on the effects of promotions or NPIs?

- ☐ Do you have adjustments to your historical demand for outliers?

- ☐ Do other functional groups make contributions or adjustments to demand? If so, what is the frequency or sequence of operations?

- ☐ How is demand consolidated across multiple functions over the planning horizon?

- ☐ How are multiple various forecasts combined into a single source of consolidated demand?

- ☐ Does the demand plan ever connect back with the AOP or financial plan, to understand implication of price-volume mix on gross margin?

- ☐ What is the optimal level of plan?

- ☐ How are the independent sources of demand identified and planned today?

Users

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Users

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- ☐ What are the types of roles of the anticipated users of Anaplan?
  - ☐ How many users do you anticipate for each type of role?
- ☐ How will each role interact with the model?
  - ☐ Are there individuals who fit into more than one role?
- ☐ How are the users accessing the platform? Via SSO? Or else?
- ☐ What level(s) of hierarchies should the permission be granted?

User Interface

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User Interface Design

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- ☐ Who are the end users?

- ☐ What is their technical aptitude?

- ☐ What are some examples of current user interfaces?

- ☐ Do the users use PC, Mac, or both?

  - ☐ What is the typical resolution of the users' computer screen?

  - ☐ What browser(s) are used?

- ☐ Are other devices used? If so, what (e.g., mobile, tablet, TV screen, double screen, etc.)?

Other Considerations

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Other Considerations

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☐ How would you measure success of your project? Which metrics do you need to achieve?

☐ How are the decisions made in your organization?

    ☐ What are the technical criteria to make a decision?

☐ Who will sign off on moving forward at each stage?

☐ Who is in the power base?

☐ What is the consequence of doing nothing?

☐ Who is willing to carry the Anaplan flag internally?

☐ Who is your executive sponsor?

☐ Who is your project sponsor / business owner?

☐ Who are the model owner(s)? Model builder(s)?

☐ Who will attend Anaplan training? How many people?

☐ Do you have change management resources who will help with training?

☐ How do you plan to train your end users?

☐ Users will need to have suitable access to modules, lists, versions and actions. Who will provision users?

☐ What is your desired go-live timing?