

Epic: Demand / Capacity Review

User Story Title: Review Forecasted Demand Against Production Capacity

Who? Operations Planner / Analyst

What? Review long-term demand and compare against rough-cut capacity plan

Why? To identify and resolve capacity gaps

How? By comparing consensus forecasted demand against existing operational capacity constraints and identifying alternative sources for future capacity requirements

Description:

As a operational planner / analyst, I need the ability to review forecasted demand and existing operational capacity constraints to determine if there are any gaps that would require adding additional capacity through sub-contracting / alternative supplier sources.

I know it's achieved when Anaplan can provide a detailed comparison by operation of the required demand and capacity from different sources, as well as flag the specific facilities that cannot meet the required demand. Anaplan allows me to divert demand to other facilities capable of meeting the demand. Anaplan also enables the ability to initiate a request for additional capacity through sub-contracting / alternative supplier sources.

Acceptance criteria:

- Include forecasted demand and capacity by location
- Include visualization of capacity gaps by location
- Include ability to realign demand to facilities with available capacity
- Include ability to create requests for sub-contracting / alternative supplier sources

Complexity Estimate: Medium

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 2

Sprint Points Assigned: TBD

Epic: Financial Review & Approval

User Story Title: Review and Approve Capacity Projects

Who? Finance Management

What? Review and approve operational capacity projects

Why? To ensure capacity with long-term demand

How? By reviewing lists of operational capacity project requests, compared to approved financial plan, and approving as needed

Description:

As a finance manager, I need the ability to review and approve operational capacity project requests so that I can ensure that capacity is aligned with the long-term demand.

I know it's achieved when Anaplan can provide a detailed list of new operational capacity project requests as well as the current location capacity, expected future capacity of previously approved projects, and the expected long-term demand requirements of the facility. Anaplan can also show me the cost of each capacity project request by location, the approved financial plan by cost center, and any financial gaps of the project relative to the budget. As a finance manager, I can review, approve, and reject, and request for feedback on any individual project request.

Acceptance criteria:

- Include long-term demand and capacity by location
- Include existing approved projects by location
- Include detailed list of project requests with cost by calendar year
- Include approved financial budget for capacity projects by location by calendar year
- Include ability to review, approve, reject, and request feedback on individual project requests

Complexity Estimate: Large

Level of Effort Estimate: Large

Sprint Cycle: Sprint 3

Sprint Points Assigned: TBD

Epic: Sales Collaboration

User Story Title: Review and Approve Adjustments to Consensus Forecast and/or Sales Budget

Who? Sales Management

What? Review gaps between consensus forecast and sales budget and approve adjustments as required

Why? To align consensus forecasted demand with the defined sales budget

How? By reviewing the consensus forecasted demand and sales budget, identifying gaps, and adjusting the forecast for sales budget to bridge the gap

Description:

As a sales manager, I need the ability to review gaps between consensus forecast and sales budget and approve adjustments as required, so that I can align consensus forecasted demand with the defined sales budget.

I know it's achieved when Anaplan can provide a top-level view of the consensus forecasted demand with comparison to the approved sales budget. Anaplan can also show me any variances between consensus demand and sales budget, as well as opportunities to expedite sales to bridge the gap. As a sales manager, I can review, approve, reject, and request for feedback on any changes to top-level sales budget.

Acceptance criteria:

- Include forecasted demand and sales budget
- Include projected variances
- Include ability to realign sales to forecast
- Include ability to request sales expedite
- Include ability to review, approve, reject, and request feedback on changes to sales budget

Complexity Estimate: Medium

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 3

Sprint Points Assigned: TBD