



# PlanR Introduction

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# ABOUT BLUE SKY

Blue Sky Global Retail Solutions is a group of retail business and technology experts with extensive experience in retail consulting, integration, implementation and support.

We work with leading international organizations in the retail industry to provide innovative solutions, best practices and technologies. As a leading industry expert company our solutions are built to perform for the industries we serve.

# HISTORY

- Founded in **Hungary** in **2015** by a group of retail and technology experts
- Rapid organic and partner driven growth
- Now over 25 consultants in Hungary, France and USA
- Partnering with Microsoft



Blue Sky provides a **configured solution** which pulls measures and calculations together to solve specific business needs and fits into the corporate strategy of midsize and large scale businesses. We use a proven approach to consulting and implementation which is based on our extensive experience with retail customers world-wide.

### We support you in:

- Implementing retail solutions adapted to your needs
- Creating a seamless integration between your systems
- Optimizing your business processes
- Ongoing application development, management and support.

Our professional services team partners with you so you quickly gain expertise with the retail solution of your choice, get results fast, and maximize adoption throughout your organization.

# GLOBAL PRESENCE

Based in Budapest Hungary, but through its partners, present in North America and Europe (France).



We work with leading international organizations in the retail industry to bring them the best software solutions and technologies.

Our clients' satisfaction is very important to us. We work closely with each of our clients to constantly measure and improve the services that we provide.

Our client references are available on request. [Please contact us](#) for more information.

## Some of our REFERENCES:

- **FinIT LTD**
- **KELER LTD**
- **FirstIT LTD**
- **AEGON INSURANCE GROUP LTD**



**PlanR** – Planning Solution



- ✓ Are you having a hard time creating and developing financial plans?
- ✓ Do you have around 20-25 k items and 50-100 stores?
- ✓ Do you have a small-medium sized financial planner team? (around 2-12 people)

- ✓ Do you have a problems with the transparency of your planning process?
- ✓ Is it working fast and efficiently enough?
- ✓ Is differentiating between roles and tasks a reoccurring problem?
- ✓ Are you sure that everyone is working with the correct numbers?

## The tool is CLOUD-BASED

### ARCHITECTURE

- Azure cloud solution
- Microsoft SQL Server to handle data
- Analytics service to handle calculations
- Application service that provides the user interface
- Active directory that handles the roles and user authentications.

## MULTIDIMENSIONAL DATA HANDLING

- The data is stored and accessed through a multidimensional model
- Enable to place the data in hierarchies (Location, Product, Calendar, Season)
- Flexibility to set up custom position levels for each hierarchy
- Provide the possibility to **aggregate data** to higher level in the hierarchy or **spread aggregated data** to lower levels using different spread-aggregation methods, depends on the configured behaviour of the given measure or KPI

## EXAMPLE FOR HIEARARCHIES AND POSITIONS

Calendar	Product	Location
<ul style="list-style-type: none"><li>•Year</li><li>•Quater</li><li>•Month</li><li>•Week</li></ul>	<ul style="list-style-type: none"><li>•Company</li><li>•Division</li><li>•Group</li><li>•department</li><li>•Class</li><li>•Sub-Class</li><li>•(Item*)</li></ul>	<ul style="list-style-type: none"><li>•Company</li><li>•Chain</li><li>•Channel</li><li>•District</li><li>•Store</li></ul>

## DISPLAYING DATA, MANIPULATING DATA

- Workbooks, Steps and Split view for displaying and manipulating data
- Wizards for creating workbooks
- Easy way to manage measures, placing hierarchies on axis and manage filters for hierarchies

Save changes
Cancel changes

Single View
Same Layout View
Save Layout
Seed
Commit
Refresh

History
Initialization
Planning
Review

Toggle Chart ▾

Manage Measures ▾

Workbook Name: Demo Financial Plan V1 | Role: TopDown

		Product All			
		1 Acme Home			1 Acme Home T
		20 Menswear		20 Menswear Total	
		21 Men's Footwear	22 Men's Casualwear		
Calendar All	LY reg sales R		511,994.000	511,994.000	511,994.000
	LY reg sales AUR		19.627	19.627	19.627
	LY reg sales U		26,086.000	26,086.000	26,086.000
	LY BOS inventory R	111,953.000	137,012.000	248,965.000	248,965.000
	LY BOS inventory U	87,715.000	71,274.000	158,989.000	158,989.000
	LY BOS IMU %	-18.259%	5.793%	-5.022%	-5.022%
	LY BOS inventory C	132,394.000	129,075.000	261,469.000	261,469.000
	LY BOP inventory R	111,953.000	137,012.000	248,965.000	248,965.000
	LY BOP inventory U	87,715.000	71,274.000	158,989.000	158,989.000

Split Workbook Name: Demo Financial Plan V2 | Role: TopDown

		Product All			
		1 Acme Home			Product All Total
		20 Menswear		1 Acme Home Total	
		21 Men's Footwear	20 Menswear Total		
	LY BOP inventory U	87,715.000	87,715.000	87,715.000	87,715.000
	LY BOP inventory C	132,394.000	132,394.000	132,394.000	132,394.000
	LY BOP inventory AUR	1.276	1.276	1.276	1.276
	LY Receipts R	2,901,039.000	2,901,039.000	2,901,039.000	2,901,039.000
	LY Receipts AUR	0.980	0.980	0.980	0.980
	LY Receipts U	2,961,310.000	2,961,310.000	2,961,310.000	2,961,310.000
	LY Receipts MU%	-13.954%	-13.954%	-13.954%	-13.954%
	LY Receipts C	3,305,855.000	3,305,855.000	3,305,855.000	3,305,855.000
	LY EoP Inv R	77,850.000	77,850.000	77,850.000	77,850.000

## DIFFERENT SET OF SCREENS TAILORED FOR DIFFERENT ROLES

Top Down user plans only values and sets high level targets

Bottom Up user plans both values and units

### ☑ TOP-DOWN WORKBOOKS

<a href="#">Create Workbook</a>	Workbook name	Workbook definition name	Created by	Created time	Modified by	Modified time
Save As Open Delete	V1 Plan	TopDown	[Avatar]	2019/02/06 13:43	[Avatar]	2019/02/21 14:44
Save As Open Delete	V2 Plan	TopDown	[Avatar]	2019/02/06 13:36	[Avatar]	2019/02/14 17:24
Save As Open Delete	V3 Plan	TopDown	[Avatar]	2019/03/27 16:01	[Avatar]	2019/03/27 16:01
Save As Open Delete	V4 Plan	TopDown	[Avatar]	2019/01/17 16:27	[Avatar]	2019/02/07 10:51
Save As Open Delete	V5 Plan	TopDown	[Avatar]	2019/01/17 16:33	[Avatar]	2019/01/17 16:33
Save As Open Delete	V6 Plan	TopDown	[Avatar]	2019/01/17 16:38	[Avatar]	2019/01/17 16:38
Save As Open Delete	Final Plan V2	TopDown	[Avatar]	2019/02/21 14:48	[Avatar]	2019/02/21 14:48
Save As Open Delete	Final Plan V1	TopDown	[Avatar]	2019/02/07 11:00	[Avatar]	2019/02/07 11:00

### ☑ BOTTOM-UP WORKBOOKS

<a href="#">Create Workbook</a>	Workbook name	Workbook definition name	Created by	Created time	Modified by	Modified time
Save As Open Delete	Plan V1	BottomUp	[Avatar]	2019/01/29 16:00	[Avatar]	2019/03/20 18:58
Save As Open Delete	Plan V2	BottomUp	[Avatar]	2019/01/29 15:57	[Avatar]	2019/02/18 16:03
Save As Open Delete	Plan V3	BottomUp	[Avatar]	2019/01/25 13:35	[Avatar]	2019/02/05 13:37
Save As Open Delete	Plan V4	BottomUp	[Avatar]	2019/02/21 11:29	[Avatar]	2019/02/21 13:06
Save As Open Delete	Plan V5	BottomUp	[Avatar]	2019/03/18 15:20	[Avatar]	2019/03/18 15:20
Save As Open Delete	Final Plan V1	BottomUp	[Avatar]	2019/01/25 13:07	[Avatar]	2019/02/21 15:13
Save As Open Delete	Final Plan V2	BottomUp	[Avatar]	2019/03/19 15:56	[Avatar]	2019/03/19 15:56



- Provide last year data information - last year data can be used to seed plan
- Templates contain indicators and KPI-s which support
  - Creation of a new plan
  - Key to plan the future and maximize sales and profits
  - More plan versions
  - Approval process between the roles

## SALES INDICATOR AND KPI-S:

- Planned Sales
- Comparing indicators to last years data
- Cumulative Markup (CMU%)
- Gross Margin Retail, Gross Margin %
- Cost of Good Sold (COGS)
- Average Unit Retail (AUR)

*\* Indicators contain mostly value data, where it is reasonable the indicator is duplicated for tracking unit values.*

## INVENTORY INDICATORS AND KPI-S:

- Begining of Sales Inventory
- Receipt Retails and Receipt Cost Inventory
- End of Period Retail Inventory
- Stock to Sales Ratio
- Sell Thru %

Search

Last Year Measures

- LY reg sales R
- LY reg sales AUR
- LY reg sales U
- LY BOS inventory R
- LY BOS inventory U
- LY BOS IMU %
- LY BOS inventory C
- LY BOP inventory R
- LY BOP inventory U
- LY BOP inventory C
- LY BOP inventory AUR
- LY Receipts R
- LY Receipts AUR
- LY Receipts U
- LY Receipts MU%

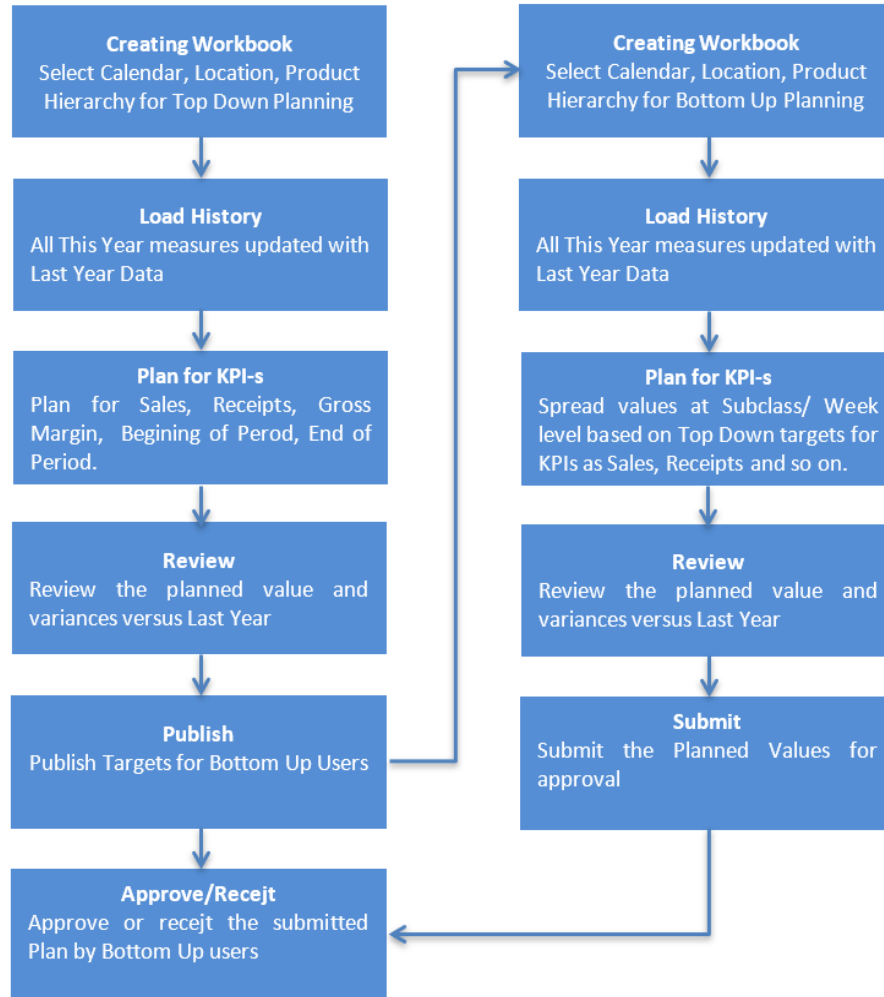
Search

**Selected Measures**

- LY reg sales R
- LY reg sales AUR
- LY reg sales U
- LY BOS inventory R
- LY BOS inventory U
- LY BOS IMU %
- LY BOS inventory C
- LY BOP inventory R
- LY BOP inventory U
- LY BOP inventory C
- LY BOP inventory AUR
- LY Receipts R
- LY Receipts AUR
- LY Receipts U

OK
Cancel

## PLANNING PROCESS



- PlanR allows business users to create high level strategic targets and detailed level financial plans.
- The flowchart presents a detailed process flow for PlanR.

Easy-to-use Configuration Tool for integrators/clients

Integrated rule engine

Extended set of indicators, KPI-s

Additional planning templates

Implementing forecasting methods

# INTERESTED TO LEARN MORE?

CONTACT US AT:

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OR VISIT OUR WEBSITE

[www.blueskygrs.com](http://www.blueskygrs.com)