



Complete Forecasting, Budgeting, and Demand Planning Checklist for FMCG and Retail Leaders.

As a FMCG and Retail business leader, you want to speed-up your process of forecasting, budgeting, and demand planning. Here's a comprehensive feature checklist for an FMCG and Retail planning solution with outcomes that you can pick and choose for your specific business needs.



This feature checklist will help you prioritize the outcomes and solutions that are most relevant for your business needs. Match these solutions with the budgeting and forecasting challenges faced by your organization to prepare a roadmap for successful automation.

Demand Forecasting:

- Time series forecasting methods.
- Seasonal and trend analysis.
- Incorporation of external factors (e.g., promotions, marketing campaigns, economic indicators).

Sales Planning and Budgeting:

- Sales target setting and tracking.
- Territory-wise and product-wise sales planning.
- Sales budgeting and variance analysis.

Inventory Planning:

- Inventory optimization based on demand forecasts and lead times.
- Safety stock calculations.
- Reorder point planning.
- Seasonal assortment planning.

Production Planning (FMCG):

- Production scheduling based on sales forecasts and inventory levels.
- Material requirement planning.
- Capacity planning.



Promotion and Marketing Planning:

- Budget allocation for promotions and marketing activities.
- Promotion effectiveness analysis.
- Campaign planning and tracking.

Financial Planning and Budgeting:

- Comprehensive financial budgeting, including income, expenses, and capital expenditures.
- P&L (Profit and Loss) planning.
- Cash flow forecasting.

Assortment Planning (Retail):

- Product assortment optimization based on customer preferences and sales data.

Store and Staff Planning (Retail):

- Store performance analysis and planning.
- Staff scheduling and resource allocation.

Category Management (Retail):

- Category performance analysis and planning.
- Assortment optimization within categories.



Integrated Analytics and Reporting:

- Interactive dashboards and reports for real-time insights.
- Ad-hoc analysis and data visualization.

Collaborative Planning:

- Multi-user access and collaboration capabilities.
- Workflow and approval processes for budgeting and planning.

Scenario Analysis:

- "What-if" scenarios to simulate the impact of various factors on plans.
- Sensitivity analysis for risk assessment.

Mobile Access:

- Access to planning and budgeting features on mobile devices for on-the-go decision-making.

Data Integration and Data Quality:

- Integration with various data sources, including ERP systems and POS data.
- Data cleansing and validation capabilities.



Security and Permissions:

- Role-based access controls and data security measures.

User-Friendly Interface:

- Intuitive and easy-to-use interface for non-technical users.

Scalability:

- Ability to handle large volumes of data and users as the business grows.

Integration with Financial Systems:

- Seamless integration with accounting and financial management systems.

Compliance and Regulatory Support:

- Compliance with financial and accounting regulations.

Training and Support:

- Training resources and customer support for users.

This comprehensive feature checklist addresses the diverse needs of FMCG and Retail businesses, enabling effective planning and decision-making for better financial management and operational efficiency.



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