



PLANNING MAESTRO

Planning Maestro is a cloud-native platform that delivers a competitive advantage through the ability to easily budget, forecast financial performance, analyze results and share critical information across the business.



LEADING RETAIL & HOSPITALITY CUSTOMERS INCLUDE:

- ▶ Atlantic Capes Fisheries, Inc.
- ▶ Big Cedar Lodge
- ▶ Chartright Air Inc.
- ▶ Family Farm & Home
- ▶ Hames Corporation
- ▶ Osage Casinos

Modern FP&A for Retail & Hospitality

Gain control over personnel expenses

- ▶ Plan personnel by job title or individual employee, applying fixed headcount and full-time equivalents that vary based on drivers such as sales, store count, website visits or walk-in traffic
- ▶ Accurately track payroll, payroll taxes, and fringe benefits for each employee or employee type

Create detailed revenue plans and forecasts

- ▶ Budget by chain, product line, district, location, or department
- ▶ Create detailed plans using key metrics such as sales, markdowns, gross margin, etc
- ▶ Apply business drivers (pieces, units, cases, gallons, dozens, SKUs) to create revenue plan; adjust revenue forecasts solely by changing drivers
- ▶ Prepare bottom-up forecasts including detailed merchandise and store plans; make top-down adjustments to key business drivers such as demand before committing to final forecast numbers

Prepare for market fluctuations

- ▶ Perform what-if scenarios based on seasonality, economic conditions, promotion cycles, ramp-up of new stores, etc.

Streamline consolidation and reporting

- ▶ Create and disseminate detailed operational reports including payroll projections or product SKU revenue by season
- ▶ Centralize data consolidation from stores, districts, regions, and company level with instant, automatic consolidation of allocations
- ▶ Model new store planning, using assumptions such as store type, store location, and seasonality, creating a fully-loaded P&L, balance sheet and cash flow based on planned store openings