

G2, the future is coming

2019 AFS USER CONFERENCE

“Enhancing the Value of Today’s Consumer Goods Manufacturers and Distributors Through Advanced Analytics - WiiFM”



Speaker Introduction



MICHAEL SCOTT, VP, AFS G2 ANALYTICS

Michael has over 25 years of experience in CPG, manufacturing, process improvement, and software development.

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Speaker Introduction



DAVID FRANKLIN, DIRECTOR, AFS G2 ANALYTICS

David Franklin brings more than 30 years of strong CPG and Food Service industry experience to AFS Technologies with a background in CPG merchandising, sales call reporting, category management, and trade promotion management software and systems support. He also has solid hands-on and management experience in software development and information technology which gives him unique insight into the infrastructure supporting the SAAS systems at AFS as well as AFS customer systems. He and his team are committed to providing excellent service to customers that have purchased AFS products and services.

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Agenda

- The future is coming, let us help you plan it
- Why G2 for planning?
- Top Down and Bottom Up
- How to plan
- Learning from the past

The future is coming, let us help you plan it!

- Planning is one of the most important pain points of any business
- Where will my sales come from?
- Will gain/lose customers?
- Where should I invest my time and money to get the best return?



Why G2 for planning?

- G2 was designed so that users across your organization could easily use it regardless of their technical expertise
- Beyond simply adding more features to G2, we are integrating new capabilities into G2 and making them easy to use (key is “easy to use”)
 - Technology should be transparent to you, but make your job easier and help you do it better.
 - Your data is already in G2, we can use that to help you make a better plan



We are experts at this...

- Who in the room has used the Compass functionality in Discovery 8?
- We had have such overwhelming requests for this functionality we decided to add this to G2!
- Let's take a quick look at it.

Planning/Forecasting Features

- We want to make the planning/forecasting feature easy to use with powerful features if you need them.
- We will discuss some of the features and how they apply to you

Core Planning Features

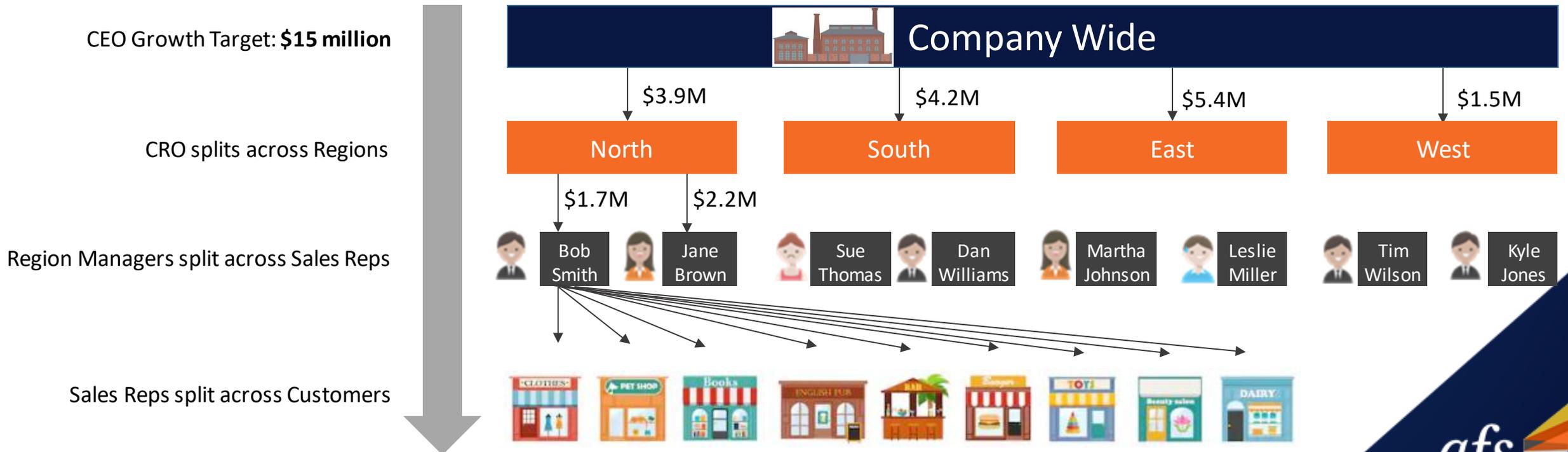
- **Customizable Edit Screen –**
 - Enables companies to create a format that allows users to easily enter their forecasts into the system
- **Create Forecast by Week, Month, Year**
 - Enables companies to create forecasts based on their business cycles
- **Enter Changes via Absolute Change, Percent Change and New Total**
 - Allows users flexibility in adjusting their forecasts
- **User-Defined Auto-Spreading**
 - Saves time by giving users the flexibility to spread forecasts evenly or by history
- **Spread Forecast Across Company Hierarchy**
 - Saves time by instantly creating and spreading top-to-bottom forecasts
- **Unit of Measure Conversion**
 - Saves time by allowing users to enter forecasts in one UOM and instantly converting it to another UOM
- **Complete Submission/Approval Workflow**
 - Creates accountability and collaboration between field sales forces and corporate users
- **Auto-Merge**
 - Saves company time by consolidating all submitted forecasts

Types of Planning

- Top Down Planning
 - If upper management says they want to grow the company by x% or \$y and this is pushed down through the levels of the organization.
 - The overall goals are set at a higher level and allocated using one or more methods down the organization hierarchies
- Bottom Up Planning
 - Planning is done at a lower level and then is rolled up the hierarchies to a top level target

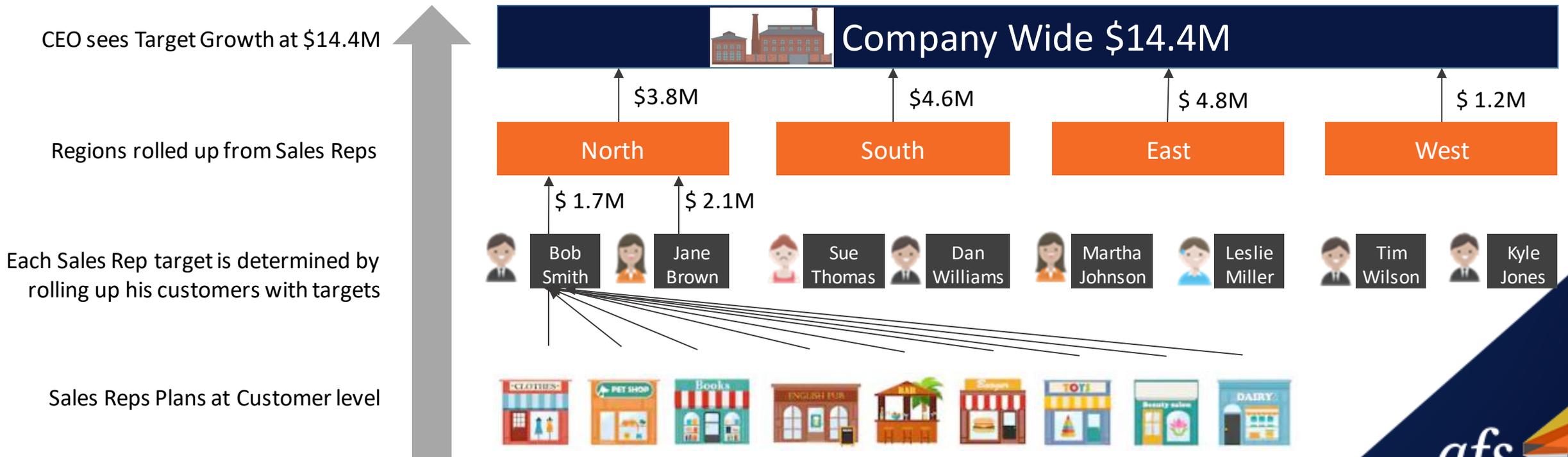
Top Down Planning

- Say your organization does Top Down Planning and Management says they want to grow the company by x% or \$y and this is pushed down
- We are showing Customer, but this can be Product/Brand or any hierarchy



Bottom Up Planning

- With bottom up Planning you plan at a lower level and the targets are rolled up through the hierarchies.
- We are showing Customer, but this can be Product/Brand or any hierarchy



DS8 Compass – Pros and Cons - Demo

Pros

- Very powerful planning tool that was fully integrated into our analytics tool
- Plan at any hierarchy level with automatic spreading up and down
- Perform “what if” scenarios by making full overrides, absolute, and percent changes
- Choose your spreading method – (Evenly across months or weight based on past history)
- Track progress against Sales, Pre-determined Baseline, and Corporate Budgets

Cons

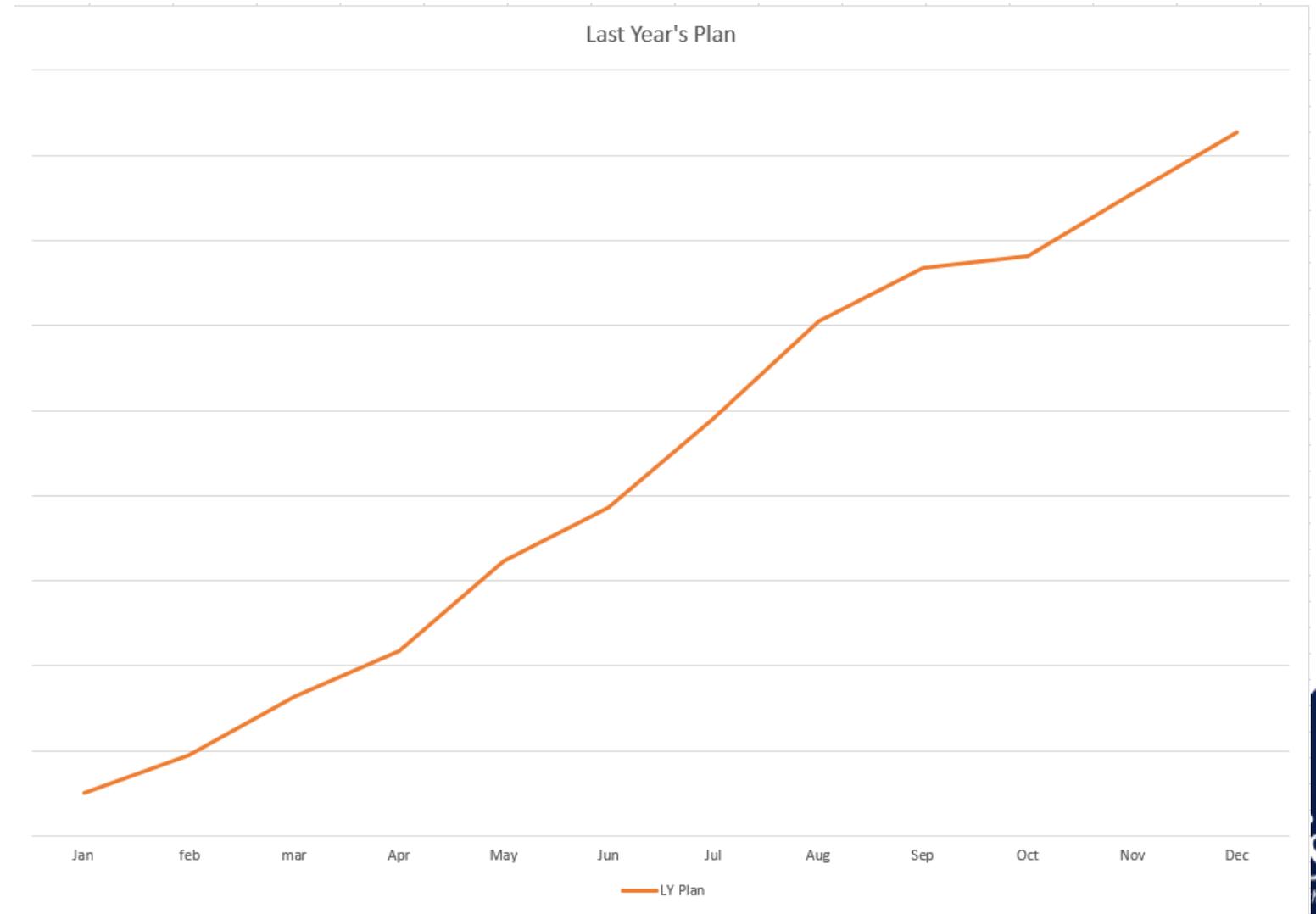
- Forecasting is done with an off-line client independent of the rest of the team
- Forecasting in multiple units of measurement had some challenges
- Forecast files had to be exported, transferred, consolidated and processed
- No visibility to corporate wide plan until all forecasting was completed and processed

Multiple Scenarios

- Since planning is just that, a plan, it is good to have different scenarios to compare
- G2 will be able to support multiple scenarios with any mix of planning types or allocation by one or more factors

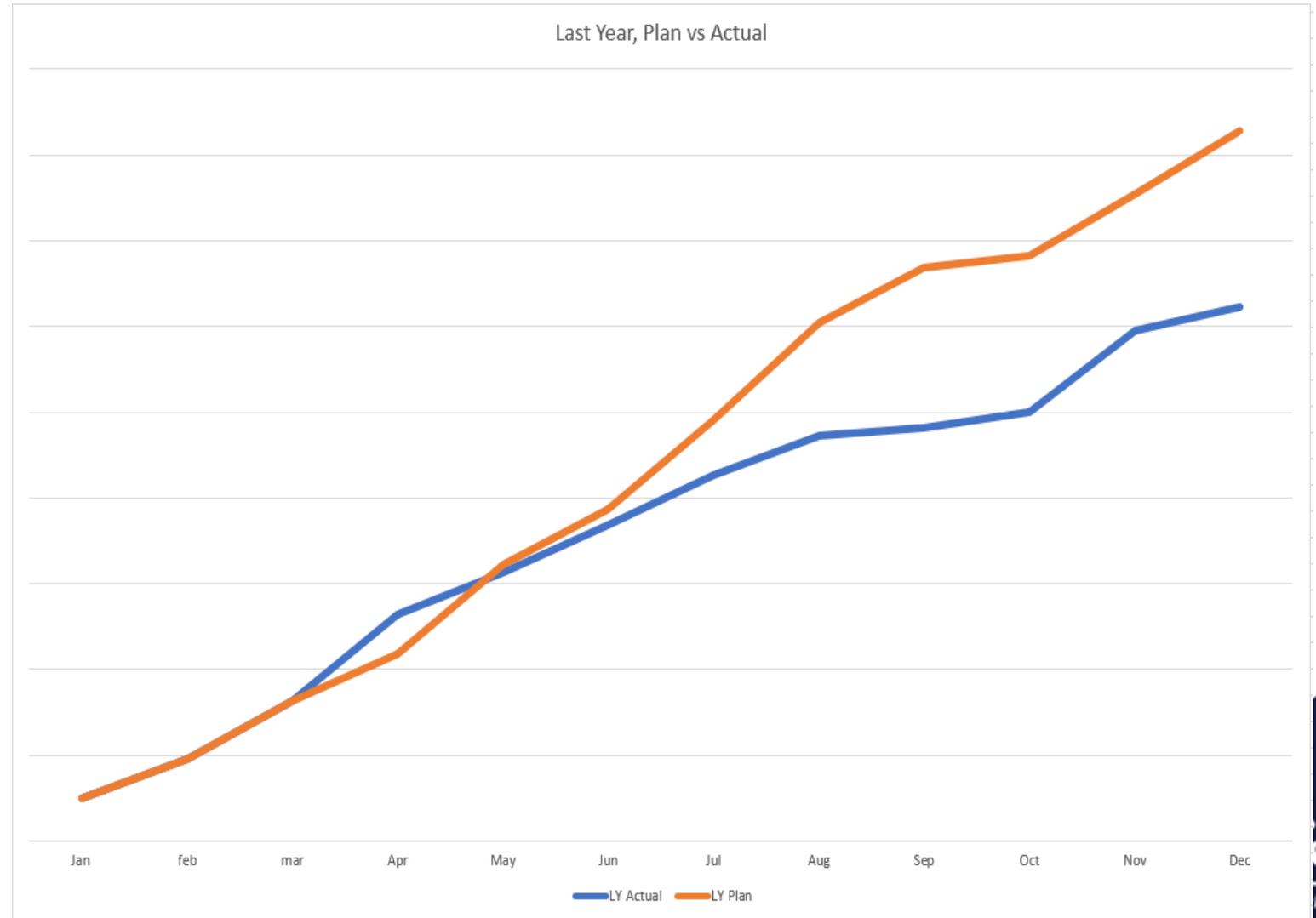
Learning From previous plans

- Let's take our plan from last year
- We created it in like we have for several years
- We tried to use our best judgement with what we knew



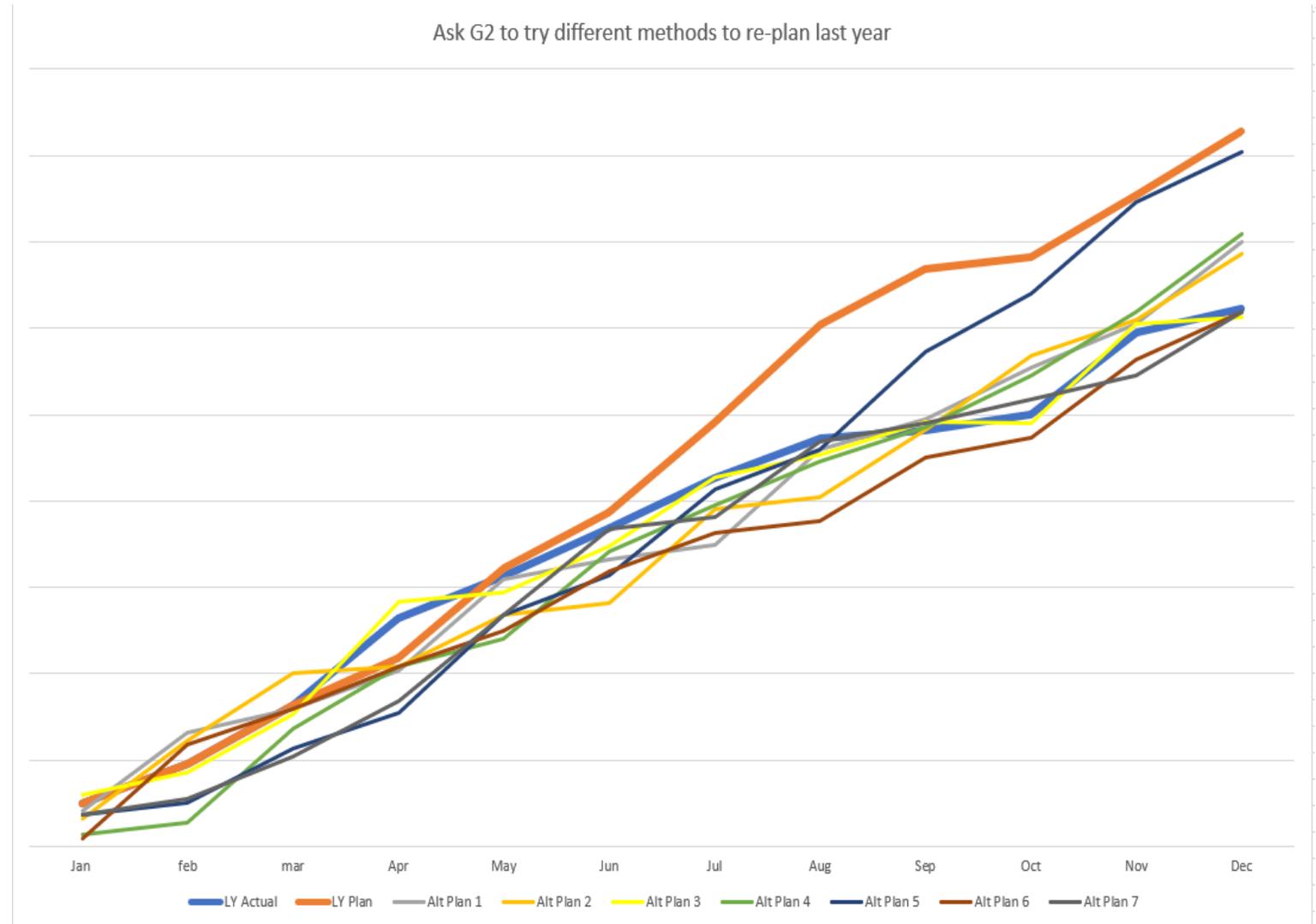
Learning From previous plans

- When we compare it to what the Actuals were for last year we see it started strong and we did not hold to the plan
- Have you ever heard the expression “If I knew then, what I know now”?



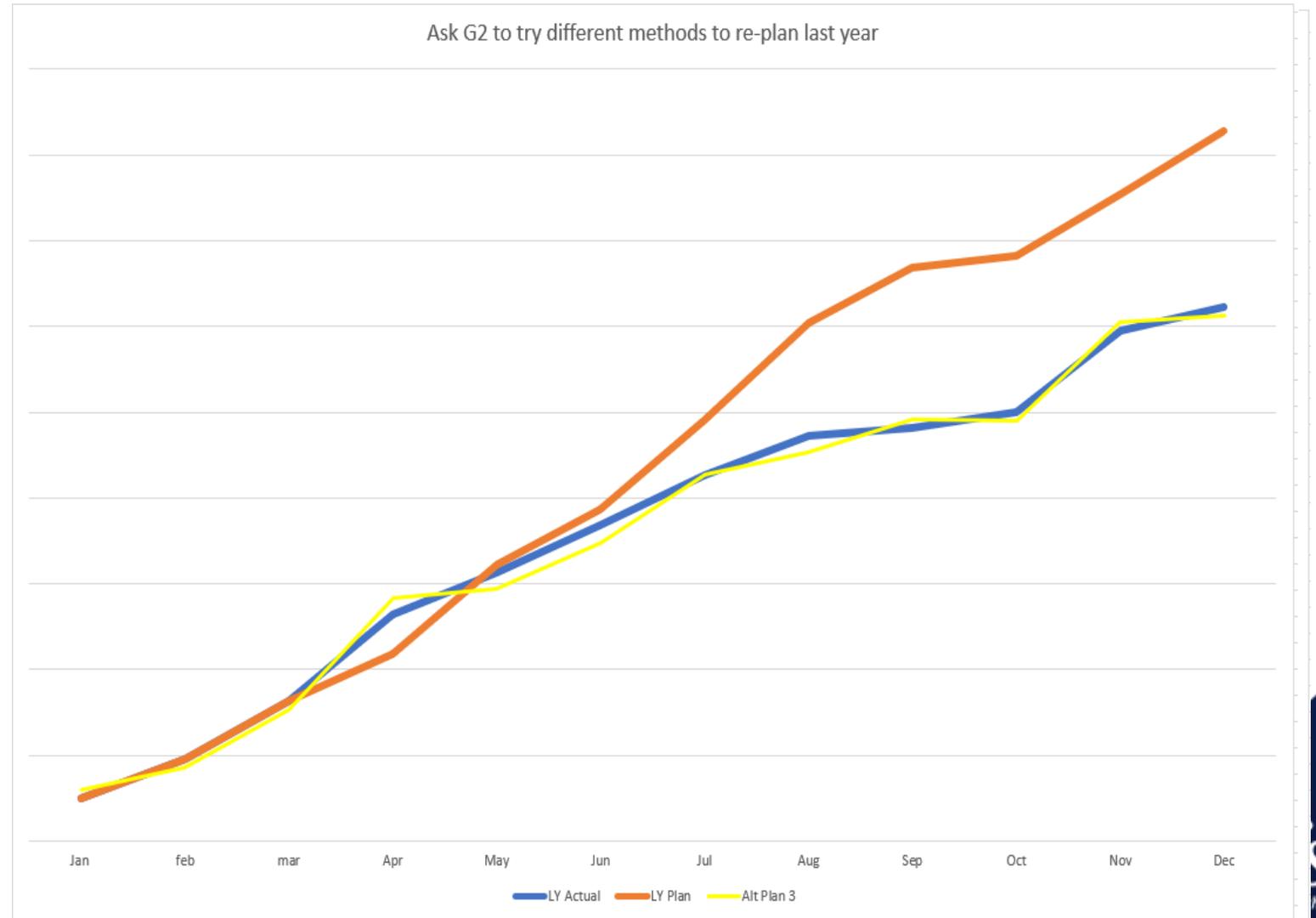
Learning From previous plans

- G2 can do that
- Ask G2 to review LY Plan vs Actuals and try to re-plan to see if another method would have been closer
- Lots of lines, lets take a look at Alt Plan 3



Learning From previous plans

- That is a lot better
- That was pretty easy also
- How is it better?



How we did this

- In G2, we can take multiple years of plans and actuals and reevaluate them and learn from our previous successes and failures
- We can also take external factors into account
- For instance, say the factory that employed 8% of our market closed 2 years ago. The unemployment rate can be used to see if using it as a factor gives us a better result.
- There are a lot of other metrics such as demographics, population, income, etc. that “might” affect your forecast
- The same way you might take these factors into consideration when planning, G2 can do that also.



Conclusion

- We want to make the planning/forecasting feature easy to use with powerful features if you need them

AFS Strategic Value Assessment

The Strategic Value Assessment service provides the opportunity to visit recommended **best practices** and **assess the value** that you're deriving from G2 Analytics.

Whether you've just implemented G2 Analytics, or you've been up and running for a while, it's important to periodically fine tune and enhance your processes.

It's a good idea, and a profitable one, to revisit key areas:

- Current Processes and Best Practices
 - Data Analysis
 - System Parameters
 - Additional Custom Training Needs
 - Overall System Usage
 - New Functionality
 - New Solution Views
 - New Dashboards and MBEs
- Do you continue to improve your processes and usage of G2 Analytics?
 - Are there advanced capabilities in G2 that may not be enabled or that you may not be leveraging?

"I thought I was fully using G2, but after my SVA, I found so many ways to save money, from increasing margin to filling voids to Rebate management.
–Large CPG Manufacturer



Contact us with any questions or to help you schedule an SVA!

You can email us at: G2AnalyticsInfo@afsi.com

Or call us directly at:

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THANK YOU!

Q & A

Next Session: Monitoring your sales, profits and trends can save you money



Microsoft



ZEBRA

Honeywell