

Planning & Budgeting with Stratum



Budgeting and planning can be unpleasant tasks, particularly if you need to pull and combine data from disparate systems, re-key it into one or more spreadsheets, involve multiple people in making plan adjustments, and then somehow mold all the raw data into understandable results.

Stratum's Planning functionality takes the gruntwork and guesswork out of the process ... letting you create sales budgets and plans with ease, and then compare them against actual sales to evaluate how well you're performing to them.

Category	Item	Actual	Plan	Change	% Change	Actual	Plan	Change	% Change
Region	North America	100	100	0	0%	100	100	0	0%
Region	South America	50	50	0	0%	50	50	0	0%
Region	Europe	30	30	0	0%	30	30	0	0%
Region	Asia	20	20	0	0%	20	20	0	0%
Region	Africa	10	10	0	0%	10	10	0	0%
Region	Oceania	5	5	0	0%	5	5	0	0%
Region	Global	215	215	0	0%	215	215	0	0%

- Using the same flexible interface that supports Stratum's analytics, you can seed your plans with historic sales results, easily input new targets, or leverage the results of forecasts generated by forecasting tools, including the Stratum.Forecasting application.
- Within Stratum's secure, web-based environment, any user can quickly develop new sales budgets or revise existing ones for each part of the organization under his or her control.
- "What-if" scenarios are supported during the planning process to provide you with different views based on hypothetical business "pictures."
- Changes can be made at the detail level ... or ... the summary level.
- Once the budgets are complete, Stratum's Planning functionality allows you to "explode" high-level plans to lower levels (or vice versa) based on historical proportions or user-defined percentages.
- Working" budgets can be compared to "frozen" budgets to track and reference changes and to maintain flexibility in the planning process.
- Finalized plans can then be copied to and summarized within Stratum for comparison and analysis against actual results.
- And automatic e-mail alerts can be issued to appropriate parties relative to plans that haven't been updated, performance-to-plan exceptions, and more.

Stratum supports flexible planning levels and time horizons, in this case region/customer and product group over a 3-month period – with plan changes being pushed down to the product level and rolled up to the region. In this example, you'll also see how changes affected the individual cells, sub-total levels and total levels. Plus, traffic lights provide a visible way for you to monitor positive and negative changes, in this case +/- 10%.

Features

EASY TO USE

- Simple, customizable, and powerful user interface designed to decrease training time and increase productivity
- Utilizes existing business data stored in the Stratum data warehouse / repository

POWERFUL PLANNING

- Enlarges the potential scope of the planning process by allowing more external variables (e.g., promotions, competition, etc.) to be taken into account
- Quickly imports budgeting application and spreadsheet data
- Drives planning down to the desired level of detail (e.g., by product, customer, month, week)
- Supports cross-functional planning and analysis (e.g., budget and sales data from different sources can reside together in a common plan)

ALLOCATIONS THAT MATCH YOUR BUSINESS MODEL

- Supports user-defined organizational models
- Easily handles a multi-user, distributed planning environment
- Supports multiple allocation models (top-down, bottom-up and middle-out) – whatever fits your organization best
- Propagation and recalculations are automatic and FAST!

FLEXIBILITY AND CONSISTENCY FOR ALL!

- Stores data in a centralized, secure, multi-user repository for a “single version of the truth!”
- Supports fast and simple plan adjustments.
- Simplifies plan version management so you know you are working on the right plan at any given time
- Lets users view and compare planning information from a variety of viewpoints
- Can automatically trigger e-mail alerts for instances requiring further investigation.



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