

Multi-Billion Dollar Frozen Dessert Product Distributor and Supplier

A multi-million dollar frozen dessert product distributor and supplier leverages OutlookSoft CPM for reporting and budgeting in an application set. An additional application set was developed to assist the data management and reporting of promotion events budgeted for by account executives. The account executives have access to source data required to create various scenarios for the annual budget of promotional events by customer, product and time. The source data includes base (non-promoted) volume.

A final scenario was decided upon for the Microsoft (MS) Excel template for submitting the budget. The process flow for the budgeting process is managed utilizing the OutlookSoft approval component of the collaboration forum. The updates made by the account executives to the status are then reported through a MS Excel template.

This organization wanted to utilize a MS Excel-based environment for the promotion planning process. By utilizing MS Excel with OutlookSoft, The organization is able to define budgets in MS Excel, load data into OutlookSoft, and export to outside data sources as required. OutlookSoft also provides an environment to report consolidated promotional event planning in a MS Excel environment. Various reporting capabilities include pre-defined templates and ad-hoc capabilities.

Requirements Assessment

A Requirements Assessment was conducted by Edgewater Technology. The assessment included interviews key personnel from the organization including the company's Chief Information Officer and Application Development Manager.

Findings of the Assessment was as follows:

- The promotion event budget process was to be implemented in MS Excel. The MS Excel environment utilizes VBA in a disconnected environment to assist account executives to create various budget scenarios.
 - An OutlookSoft database was to store key assumptions needed to create a budget as well as the final results defined by the offline MS Excel environment.
 - An account executive controls how any different budgeted 'events' will be run, so the creation of events for budgeting will be dynamic within the offline MS Excel environment.
- One key assumption, base volume, can be edited.
 - A MS Excel template used to create the budget process needed to be created with MS Excel functionality in order to allow time to train users on the process.

Goals for the the Marketing application enhancements were identified as follows:

- Simplify the process to create a promotion plan while increasing the level of detail promotions is planned including distributor channel;
- Ability to export the final approved budget to an external data source where actual activity is recorded; and
- Capable to export the final base volume to an external data source.

Milestones

Major tasks of the Marketing Enhancement project were:

- 1. Application Creation**
 - Create an application structure
 - Optimization of the existing structure
 - Review, testing and documentation
- 2. Base Volume Review and Update Templates**
 - Finalize MS Excel prototype functionality
 - Create process to retrieve base volume for review in off-line environment
 - Create functionality to review and update base volume
- 3. Budget Input Templates**
 - Finalize Excel prototype functionality
 - Create process to retrieve event drivers for use in off-line environment
 - Create functionality to clear, and submit a budget scenario
- 4. Interfaces**
 - Develop interfaces to import drivers
 - Develop interfaces to export base volume and event budget data
- 5. Reporting**
 - Create report to review status of budget submission
 - Create reports to consolidate budget data for review by executives
- 6. Documentation & Knowledge Transfer**
 - Full administrative and operational documentation
 - Detail data interface documentation
 - Hands-on training and knowledge transfer