# Merchandise and Assortment Planning

Passionate about retail

## **Torexretail**



## Merchandise and **Location Planning**

Breakdown merchandise plans into

Develop plans for multi-channels

collection of product based on delivery

### What Issues does it solve?

	Challenge	Benefits of the Compass Solution
	Integrating Merchandise and Location plans with Assortment plans is difficult	The Merchandise & Store Plans feed the Store groupings and Assortment plans, for complete integration
Integrate chain level Merchandise and Location planning processes weekly	Developing and managing complex plans is time consuming	Solution supports multi-dimensional locking, spreading, reporting and exception reporting
Plan Sales at Full price & Non-Full Price, Inventory, Receipts and Margins at multiple levels of Product, Location and Time Hierarchies	Lack of visibility of data at all levels	Integration of data from all areas of the business, with consistency of plan and actual roll-ups to all levels
Consider monthly variation in consumer demand	Planning by merchandise delivery is too complicated	Merchandise plans can be broken down by seasonality or launch collections, so that new and key item Assortment plans can be driven from higher level plans

Ant. Aug 14 

Store Groups – Volume – relative grading

S matter tartata	105-144	na Group by Attibute   Grade Surrenary	Autograve Withole Advictor Existen
a source southers	Shine Arthdrate Searchins		
Exect. Direction     File File Spectrometers     File File Spectrometers     File File Spectrometers     Spectromet	e Capacity e Can e Clanate e Car	atom 🕑 High Fachica nii 🕑 Campether	Have Altitude Interaction: Reported Changing the selection is uffect the phonon weakput to the product states. Towardsen, this paramin is maintainly well to obser within the group the fiber of or their breach and only and therapes are only to second by exclusive breaking the of the offer-
E IFut-O-CAlam	Larlar g view Disruber Drubests serverstree Marries Draw France 1111 Paper 1 Contex 1111 Paper 1 Contex 11111		Noting 2003, and it and a state of a
✓ WorkDow Guide: Seriel care of these spatiations we doe secondation.	101 University Mark Multi 101 Market Multi 101 Market Mark Multi 101 Market Mark Multi 101 Mark Mar		

Store Groups – Select/Review Attributes

#### **Compass Planning**

# Assortment Planning

### What Issues does it solve?

		Challenge	Benefits of the Compass Solution
		Tailoring assortments using spreadsheets is tedious	Assortment plans are initialized from targets and changes can be spread down to item by Store group to provide an accurate plan with very few entries
	Build targeted assortments based on customer focused location groups	Determining the appropriate breadth and depth is difficult	System generated item counts and plan based seeding keep assortments focused
•	Plan assortments using placeholders and defined items	Reconciling Assortment plans with Financial plans is difficult	Integration with Merchandise & Store plans means that assortment roll-ups can be compared to higher level plans as you change your assortment
1	Generate recommendation of items needed to meet plans or fit constraints	Store base is large and varied	Rule based auto-ranking that groups stores by sales performance and other criteria at varying product levels
Ì	Group locations based on attributes such as volume, space and climate to tailor assortments to different customers	Analyzing assortments by product attribute is manual and time consuming	Reviewing the assortment by multiple attributes (such as color and fabrication) is dynamic yet simple
1	Size and pack the buy based on location specifc size profiles and logistic constraints	Introducing items into climate groups at different times is difficult	Assortments can be tailored to different climatic zones, and distribution timings can be offset by store group

			and the										E lamayine Advantation (Ministration
		andra C											
erutie la													And the local local local local local
-	-	-	-	-	1	£		-	ais.	÷	in	12	
100		4,41.00	Annual Sec.	34240.0479						-			
100	100		Dennesthe	INDEX HAVE	. 18			. 8	28.1		-	80	
100	2	See.	Interioral Ref.	NAME OF T	1				-	-	2	-	
-		Autor pro	Parent, April 201	RANGEDOPTE	12			-1-	21			-	
		Same Same	Paralization	NUMBER	12			12	20	-	-	-	
-		and an	Paral loss line	Index in print.	1.1			- 21	1		-	-	
	100		Paral Ant Dat	Address of the	1.1	1.000		14	10.0	-	-	-	
-	-	100.00	Perchaserbor	mande premy	1.00			1.0	-	100			
-	-444	Another .	Cognitization Sold like	NUMBER OF STREET	1.10	64.3	1000		41	201	-	-	
-		644	Gegeliates 54/84		1.10				80.0	- 84	-	- 67	
-		8101546	ing false he he	144168-01012	. +*				***	-	-	-	
-		Rinks .			1.10	34.7		. *	20	-	-		
12		See.	Corp Name No. 24 Door Tasket Dat	ing here	1			1	21			-	
-	122		Right Street Street	Long Bank	12			- 2-					
		But ha	Burrane he	and an	1.2			- 2	-	-	-	-	
		Brene .	Burrises Inc.	Long Barry	1.10				-	100			
		lane -	Burlings by	Long Barry	1.50				16.2	18	-		
=		-	Burlinson Stat	long film	1.00	10.1			14.4	-	-	-	
	1		Bullinger Ball	Long Bark	1.20				100		1000		

DE DEEN Webs in the Discourse from African Day (Minist Dates) 45 ------Done Done Done Done Done Done -40 10 284 11 12 11 13 11 200

Assortment Plan

#### **Compass Planning**

## Allocation

## What Issues does it solve?

Allocations don't reflect the decisions made in Assortment PlanningThe Allocation Strategy allows users to look at the full assortment in advance of allocating, and after each allocation allocation 'methods' means that allocation 'methods' means that allocation is time consuming and tecisions made at tecisions made at tec			Challenge	Benefits of the Compass Solution
<ul> <li>Review and update original assortment plans by location group to reconcile with the latest store performance</li> <li>Manage Product workflow</li> <li>Select a size profile that will optimize order constraints with store size need</li> <li>Execute allocation using a method best aligned with item</li> <li>Manage In-season Merchandise &amp; Store projections</li> <li>Allows for allocation of packs and singles based on store need</li> <li>Allows for allocation of packs and singles based on store need</li> <li>Review allocations against targets and release, manage impact of allocations</li> <li>Review allocations against targets and release, manage impact of allocations</li> <li>Review allocations against targets and release, manage impact of allocations</li> <li>Lack of exception analysis means</li> <li>Exception filtering allows for immediate attention or correction</li> </ul>			reflect the decisions made in Assortment	look at the full assortment in advance of
to reconcile with the latest store performanceDecisions made at time of allocation do not tie to financial plansConstant visibility to higher level plans when making allocation decisions leads to better allocation better allocationsManage Product workflowItem lifecycle requires more than one method of allocationIncludes methods that support initial receipt and replenishment to FP and NFP stock and salesExecute allocation using a method best aligned with itemManaging daily activity is time consumingBuilt in workflow that allows you to be more efficientManage In-season Merchandise & Store projectionsSatisfying store need using Packs and Eaches is trickyAllows for allocation of packs and singles based on store needAllocation of coordinates is manualReview allocations against targets and release, manage impact of allocations on inventory against store plansLack of exception analysis meansReviewing filtering allows for immediate attention or correction	÷		consuming and	means that allocations are performed to a
Manage Product workflowItem lifecycle requires more than one method of allocationIncludes methods that support initial receipt and replenishment to FP and NFP stock and salesExecute allocation using a method best aligned with itemManaging daily activity is time consumingBuilt in workflow that allows you to be more efficientManage In-season Merchandise & Store projectionsSatisfying store need using Packs and Eaches is trickyAllows for allocation of packs and singles based on store needAllows for allocation against targets and release, manage impact of allocations on inventory against store plansAllocation of coordinates analysis meansReviewing Allocations, meaning co-ordinates artering allows for immediate attention or correction		to reconcile with the latest store performance	time of allocation do not tie to financial	when making allocation decisions leads to
<ul> <li>Select a size profile that will optimize order constraints with store size need</li> <li>Execute allocation using a method best aligned with item</li> <li>Manage In-season Merchandise &amp; Store projections</li> <li>Allows for allocation of packs and singles based on store need</li> <li>Review allocations against targets and release, manage impact of allocations on inventory against store plans</li> <li>Marage In-season Merchandise and singles based on store packs</li> <li>Review allocations against targets and release, manage impact of allocations on inventory against store plans</li> <li>Manage In-season for the store plans</li> </ul>		Manage Product workflow		
<ul> <li>Execute allocation using a method</li> <li>best aligned with item</li> <li>Manage In-season Merchandise &amp; Store projections</li> <li>Allows for allocation of packs and singles based on store need</li> <li>Review allocations against targets and release, manage impact of allocations on inventory against store plans</li> <li>Lack of exception analysis means</li> <li>more efficient</li> <li>more efficient</li> <li>more efficient</li> <li>More efficient</li> <li>More efficient</li> <li>Allows for allocation of packs and singles based on store need</li> <li>Review allocations against targets and release, manage impact of allocations</li> <li>Lack of exception analysis means</li> <li>more efficient</li> <li>more efficient</li> <li>more efficient</li> <li>More allocation of packs and singles</li> <li>based on store need</li> <li>Reviewing Allocations of co-ordinate &amp; linked items is a standard step before release of the allocations, meaning co-ordinates are correct by store</li> </ul>	2		more than one	receipt and replenishment to FP and NFP
Store projectionsusing Packs and Eaches is trickybased on store needAllows for allocation of packs and singles based on store needAllocation of coordinates is manualReviewing Allocations of co-ordinate & linked items is a standard step before release of the allocations, meaning co-ordinates are correct by storeReview allocations against targets and release, manage impact of allocations on inventory against store plansLack of exception analysis meansException filtering allows for immediate attention or correction	2	-	activity is time	-
singles based on store need       Allocation of coordinates is manual       Reviewing Allocations of coordinate & linked items is a standard step before release of the allocations, meaning coordinates are correct by store         Review allocations against targets and release, manage impact of allocations on inventory against store plans       Lack of exception analysis means       Exception filtering allows for immediate attention or correction	1	-	using Packs and	
<ul> <li>Review allocations against targets and release, manage impact of allocations on inventory against store plans</li> <li>Lack of exception analysis means</li> <li>Exception filtering allows for immediate attention or correction</li> </ul>	1			linked items is a standard step before
on inventory against store plans Lack of exception analysis means Exception filtering allows for immediate attention or correction		• •		, 0
by store		•	analysis means reviewing allocation	

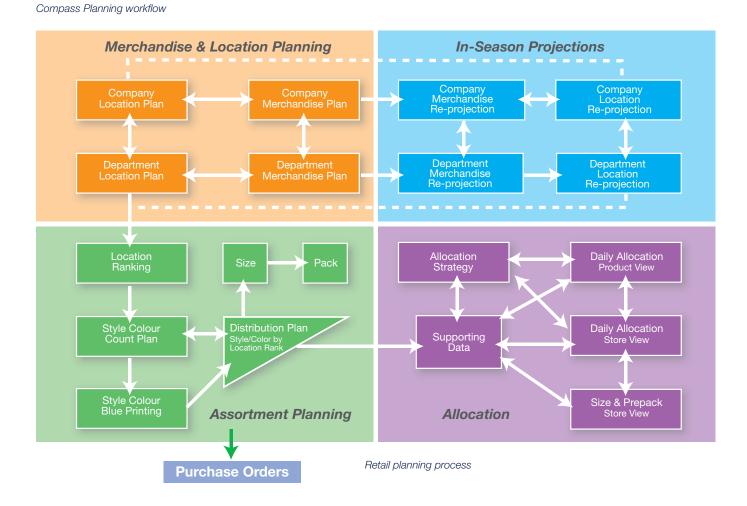




Retail Insights

Allocation strategy

Compass Planning What's so important about workflow?	What Issues does it solve?					
	Challenge	Benefits of the Compass Solution Eliminate risk of incorrect processing: perform steps in the correct sequence				
	Complex set of steps in many spreadsheet plans					
	Planning takes too long	Improved efficient (workflow) process, allowing more time for decision making				
The unique Compass Planning workflow solves many planning problems	Controlling the cost base as the business grows	Efficient scalable solution allowing you to grow, with a workflow guide to help new staff training				
	Vulnerability of loss of key individuals	Tailored workflow and guide minimizes dependence on specialist knowledge & allows staff mobility				
	Lack of business best practice	Advice from specialist consultants with years of merchandise & assortment experience who have developed best practice workflows for your use				
Constant Planning     Store Flenning     Store Flenning     Store Flenning     Store Flenning     Store Flenning     Planto Flenn Transfers     Planto Flenning	It takes too long to train users to a good standard	Each step in the workflow has a training guide, so new users learn to be effective very quickly				
Alternate Hannerby Maintennerc	In your current system, you get lost swapping between different modules	The workflow integrates all modules transparently, so the user never needs to move out of the workflow steps				



## Torexretail

Torex Retail Americas 400 Scenic View Drive Cumberland RI 02864 Tel: 401-658-3900 Fax: 401-658-5234 Compass@torexretailna.com www.torexretailna.com







