

# Merchandise Financial Planning

Connecting strategy and execution  
with Merchandising Financial Planning



See one single version of the truth with all targets, reduce latency to make decisions, and provide transparency. →

**Merchandising Financial Planning** is one of the earliest steps on the path to connecting strategy and execution, providing visibility and linkage across all the brands and regions of an enterprise. This omnichannel process has tremendous value for both brand manufacturers and retailers alike, utilizing the single platform architecture of o9's Digital Brain.

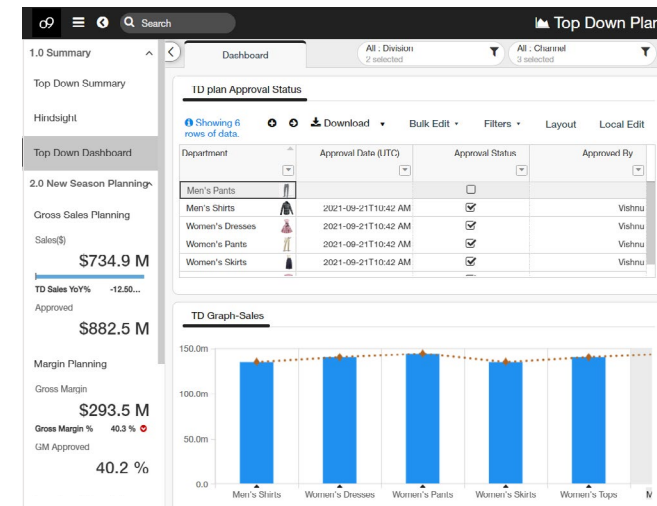


## Introduction



o9's MFP solution uses **advanced sales and margin projections** from basic LY + growth model to using ML analytics based on more sophisticated KPIs like traffic, market share/ size, and competitive intelligence. The platform provides **top-notch**

**visibility** and **cross-functional collaboration** to manage all targets in one platform: reconciliation of top-down and bottom-up plans, scenario planning with multiple versions (conservative vs. optimistic).

Build and manage customer-centric  
Merchandise Financial Plans

o9's AI platform can **upgrade** your revenue planning to **empower** channel, sales, finance and product marketing to **collaborate, plan and align** on plans, initiatives and resources to **optimize** revenue and margin

performance. It also **supports** alignment of go-to-market Strategies and Initiatives with the ability to plan by attributes and establish Open-to-Buy controls.

## Why customers choose o9 for their **merchandise planning software**

### Integrated Analytics

- Connect all financial, strategic, Top down, Middle-out and Bottom-up planning process with real-time relationships.

### Driver Based Plans

- Develop business impact understanding with financial forecasts and forward-looking drivers.

### Unprecedented Systems Scalability

- Move from legacy systems to a highly scalable and cloud-based system.

### Open-to-Buy

- Align organizational spending with the financial goals by assessing revenue, gross margin, markdowns, and inventory.

### Omni-channel Merchandising

- Create financial plans to improve efficiency, quality and accuracy. Address your unique needs in the omni-channel approach.

## Benefits

With o9's Merchandise Financial Planning cross functional collaboration is key.

### KPI Benefits

- Company profitability/ Gross Margin
- Improved productivity across the organization
- Time efficiency; Re-allocating time towards strategy and improving productivity

1. **Merchandise Plans** using Retail and Cost Methods of Accounting and Integrated Attribute Planning
2. **Real-time reconciliation** with assortment, allocation, replenishment with statistical and AI/ML driven projections
3. What-if scenarios and simulations to **analyze** and **build** plans
4. **Modeling** growth by business drivers such as assortment changes, promotions, demographic shifts, etc.
5. **Real-time aggregation** and disaggregation at any level in the hierarchy
6. **Communicate and collaborate** within the team and across functional teams

Want to learn more?

→ Go to **o9.solutions.com**

→ Get in contact with  
our sales team through  
**contact@o9solutions.com**

