Retail Planning

Consistently attract, capture and retain market share with localized assortments and category plans developed with the world’s leading cloud-based forecasting, planning and space management tools.
Anticipate, Align and Adapt:
Synchronizing Retail Planning to Capture a Greater Share of Wallet From a Greater Number of Omni-Channel Consumers

Retail is evolving at an unprecedented pace. Driven by the exploding mobile landscape, ubiquitous connectivity, and the continuous expansion of omni-channel offerings, today's consumers expect a synchronized shopping experience, instant gratification and personalized offers no matter where or how they shop.

Retail planning practices that not so long ago were effective are no longer adequate. Disjointed waterfall planning processes bound by seasons no longer keep pace with rapidly evolving consumer sentiments. Shotgun promotions and wedge assortments based on store size and volume are no longer sufficient to stay relevant to the hyper-connected shopper that is inundated with offers and choices. Financial, buying, merchandising, pricing, marketing, store-level and supply chain plans can no longer be developed in silos without consideration for consumer preferences, shopping behaviors and supply chain constraints. Proficient space management across all categories is also becoming an increasingly important competency in today's retail world.

To successfully address these challenges, retailers must replace outdated practices and technology that have become a detriment to developing relevant, adaptive and localized assortments, offers and experiences that grow share, margins and competitive advantage.

The JDA Retail Planning Solution: Continuous Lifecycle Planning Fueled by Leading Technology

JDA Software combines transformational technology with best practices and expertise developed by helping hundreds of retailers excel in today's customer-centric, omni-channel environment. The cloud-based JDA Retail Planning solution combines the world's leading forecasting, planning and space management tools to equip retailers with the efficiency, agility and intelligence they need to develop localized assortments and category plans that consistently attract, capture and retain market share. JDA Retail Planning enables you to:

- **Synchronize** cross-functional business strategies
- **Anticipate** shifting consumer sentiments
- **Align** to supply chain capacity and constraints
- **Adapt** to evolving omni-channel expectations

**BENEFITS OF JDA RETAIL PLANNING**

- Plan, manage and execute financial, merchandise and localization strategies that drive profitable, consumer-centric inventory and item lifecycle plans, increasing maintained margins and GMROI
- Maximize return on inventory and minimize cost to serve with integrated planning and execution
- Gain increased visibility and organizational agility for faster response to market and enhanced performance
- Achieve truly localized assortments via consumer demand, consumer preference and space-aware assortment recommendations for increased customer satisfaction and revenue
- Gain at-a-glance plan evaluation, performance insights and consumer offer validation capabilities with JDA’s market-leading visual planning paradigm
- Streamline field collaboration and store-level execution with assortment optimization automation and mobile planograms

**Retail’s New Planning Paradigm: Continuous, Real Time, Integrated**

To be effective, planning can no longer be conducted in cross-functional silos bound by artificial “seasonal” timeframes. Planning cultures must break down the silos and adopt continuous, real-time processes that anticipate and adjust to changes in the market as they happen. JDA’s integrated planning solution provides the tools to turn financial goals into inventory and assortment strategies that match product breadth and depth with localized preferences and tastes. You can then align those plans to capacities and constraints inherent in the extended supply chain.

By adapting continuous, integrated planning processes to changing market conditions and consumer expectations — whether mid-season, post-season, early season or late — JDA Retail Planning helps infuse agility and intelligence into the entire enterprise to improve responsiveness, anticipate trends and expand margins.
BANISH DEMAND FORECASTING SILOS
Forecasting in silos across the organization will almost certainly lead to missed signals and forecasts that over- or under-estimate demand. JDA’s time-phased demand planning tools are integrated throughout the entire planning lifecycle to overcome these issues, delivering clear insight into the “when” and “why” of demand...in addition to the “how many.”

JDA’s demand forecasting engine accounts for all demand signals holistically across the organization to provide an initial forecast that drives inventory investment and purchasing budgets as well as demand forecasts for in-season assortment management. Additionally, integrated pricing and promotion plans drive forecasts that result in inventory and assortment plans that are in sync with promotional demand spikes as well as fueling smarter, more targeted promotions that lead to fewer markdowns, better customer experiences and fewer out-of-stocks.

ASSORTMENT SEGMENTATION TAKES CENTER STAGE
When incorporating new items into the mix or new seasons into stores, retailers often rely on broadly defined customer segments that are confined to the retailer’s specific customer interactions rather than a holistic view of customer preferences and segments. Retail Systems Research reports that 71 percent of leading retailers indicate that fragmenting customer segments make it harder to reach their customers. Assorting to segments is also problematic, with only 26 percent reporting the ability to assort against key customer segments. Assortment plans based on wedge assortments driven by store groups quickly lead to mismatches with shopper preferences, missed opportunities and eroded margins.

JDA Retail Planning delivers embedded analytics that leverage new consumer insights to achieve “extreme localization” of assortment and category plans that align more closely to shopper preferences, fostering better experiences and greater brand relevancy.

PLANNING’S NEXT FRONTIER: ALIGNING TO THE SUPPLY CHAIN
The ability to understand and align with supply chain constraints and capacity during the planning process is critical. Without such visibility, assortments and allocations are built in silos and ultimately lead to missed sales, out-of-stocks and dissatisfied customers.

JDA Retail Planning helps you align with the supply chain by providing true end-to-end planning processes with full supply chain visibility. Continuous planning processes not only anticipate anomalies based on supply chain constraints and capacity limitations but also help planners react more quickly to unplanned conditions in order to adjust course and incorporate alternate workflows.

Streamline Space Management and Planogram Execution
Many retailers often determine their floor sets, promotional sets and category plans in silos, and typically, once floor plans are approved, communication with the stores that must execute the resulting planograms is unreliable and inefficient. Limited visibility leads to an acute inability to measure compliance, and poor compliance can quickly lead to space that is not optimized, missed revenue opportunities and disappointed customers.

The JDA Retail Planning solution offers the most widely used space and category management capabilities in the industry, with macro space planning tools that drive space-aware assortments in JDA’s assortment solutions and micro space planning tools that provide planogram capabilities for final validation of space decisions that foster profitable execution at the shelf.

JDA Retail Planning integrates premier planogram tools with JDA’s industry-leading task engine to provide mobile tablet access to visual planograms in the store and chain-wide visibility into execution and compliance. Approved tasks are immediately communicated to the stores for execution. Comprehensive task tracking provides a clear understanding of assignments, status and compliance rates to help make the most of every opportunity.
STORE-LEVEL EXECUTION MUST BE PLANNED

A retailer’s pre-season planning process must now include store planning to decide on questions such as how much space should be set aside for shoppers versus how much to allocate for back-room space in support of click-and-collect initiatives. Assortment and category planning must be linked to in-store picking to account for how much merchandise can be presented to the shopper in the store and also to enable lowest-cost in-store fulfillment, including the ability to offer same-day delivery or collection at a store. These can no longer be considered execution-level decisions and must be planned upstream.

Greater Than the Sum of the Parts

Only JDA can combine the world’s leading forecasting engine with the world’s leading merchandise and assortment planning, allocation management and space management tools to enable continuous planning in the cloud. JDA has been providing retailers with proven best-of-breed planning solutions for decades, with these solutions delivering results at more than 600 retailers around the world. Retailers can now leverage the entire JDA Retail Planning solution footprint to achieve even greater benefits by developing integrated, constraint-aware cross-functional plans throughout the entire merchandise lifecycle.

The JDA Retail Planning components work together to streamline workflows and enable optimum performance. JDA’s unparalleled combination of business process breadth, functional richness, robust technology and industry expertise make the value to you as a JDA customer much greater than the sum of the parts.

The JDA Cloud Advantage

For a myriad of reasons — the cost of hardware and software, the rapid advancements in technology and application capabilities, and most importantly, the need for maximum agility in responding to the fast-changing retail marketplace — it is imperative to embrace the cloud. Internet-based cloud solutions are better positioned to match the rapid changes in the omni-channel environment, and the cloud-based JDA Retail Planning solution provides consistent, reliable and up-to-date capabilities that are carefully calibrated to match shifting conditions by a team of JDA experts. This greatly improves agility, reduces risk and helps ensure seamless operations across the enterprise at all times.