

Sales Forecasting with Writeback



Industry:
A Global Pharmaceutical firm

Location:
United States

Revenue:
USD 55 Billion

Business Challenge:

The firm was looking to automate a forecasting solution heavily relied on Excel spreadsheets to capture data from multiple users. This was a highly manual, time-consuming and error-prone process.

Solution:

Leverage Inforiver on Microsoft Power BI for

- Company Legal P&L Forecasting
- Variance reporting
- Bottoms up Sales/PGM detail
- Data writeback to Amazon Redshift

Inforiver Feature Highlights:

- Measure on rows layout
- Threaded conversations with users
- Add additional time period columns
- In-cell visualizations
- Data-level commenting
- Data writeback

Outcomes:

The solution drastically reduced planning & forecasting timelines and was rolled out to 100+ users at the time of creation of this case study. The forecast KPIs and financial metrics captured are used by senior leaders to support decision-making.

ABC Sales Forecasting

2023.05 Forecast

Selling Company	Selling Point	Org	Receiving Country	Material	Value	Grant Total	2023Q4	2023Q5
1000 - ABC	11 - US..	AA_US..	United st..	111-ABC	Qty			
2000 - ABC	12 - US..	BB_US..	United st..	111-ABC	Qty	1,234,567.00	123,456.00	123,456.00
3000 - ABC	13 - US..	CC_US..	United st..	111-ABC	Net Pric..			
4000 - ABC	14 - US..	DD_US..	United st..	111-ABC	Unit Co..	1,234,567.00	123,456.00	123,456.00
5000 - ABC	15 - US..	EE_US..	United st..	111-ABC	Sales			
6000 - ABC	16 - US..	FF_US..	United st..	111-ABC	Cost	1,234,567.00	123,456.00	123,456.00
7000 - ABC	17 - US..	GG_US..	United st..	111-ABC	Net Sal..	1,234,567.00	123,456.00	123,456.00

Financial Summary

Currency: USD

	AB	BC	CD	DE	EF	FG	GH	HI
	\$123.4M	\$123.4M	\$123.4M	\$123.4M	\$123.4M	\$123.4M	\$123.4M	\$123.4M

ABC with Variance

Year	AC	PP	ΔPP	ΔPP%	ΔPP DTE
2023	1,234.56	1,234.56	12.34	1.2%	-12.34
ABCDFG	-123.45	-123.45	12.34	-12.34%	1.23
ABCDFG	-12.34	-12.34	12.34	-12.34%	-1.21
ABCDFG	-1,234.56	-1,234.56	123.45	12.3%	1.23
ABCDFG	-0.00	-0.00	-0.00	0.00	0.00
ABCDFG	12.3	12.3	12.3	-123.4%	1.23
ABCDFGH	-12.34	-12.34	12.34	123.4%	1.23

USD Trend

Operations Breakdown

Year	AC	PP	ΔPP	ΔPP%	ΔPP DTE	Delta KPI
2023	123.45	123.45	123.45	-12.3%	-1.23	
ABCDFG	123.45	123.45	1.23	1.2%	-1.23	
ABCDFG	123.45	123.45	1.23	1.2%	-1.23	

Results 1

select * from (SELECT abcd_123, abc_333_123)

irnotes	ircomments	irwritebackuser	irwritebacktimestamp	source	abc qty
1	[NULL]	username@abcd.com	2023-01-01 11:11:11	Visual Measure	[NULL]
2	[NULL]	username@abcd.com	2023-01-01 11:11:11	Visual Measure	[NULL]
3	[NULL]	username@abcd.com	2023-01-01 11:11:11	Visual Measure	[NULL]
4	[["comment": "Username. abcdefghijklmnopqrstuvwxyz"]]	username@abcd.com	2023-01-01 11:11:11	Visual Measure	[NULL]
5	[NULL]	username@abcd.com	2023-01-01 11:11:11	Visual Measure	[NULL]

"Our experience with Inforiver has been very positive. We have been able to deploy solutions rapidly, at minimal cost, while greatly streamlining our cumbersome, Excel-based planning process. By incorporating the solution into Power BI, the immediate visibility during the cycle made possible by Inforiver has been a game-changer."

Andrew Gundrum
Director, Financial Data & Analytics, Merck