

Rapidly growing American eyecare retailer for prescription glasses, contact lenses and sunglasses with online and physical retail stores across the U.S. and Canada.

Business Challenge

- **Tremendous growth being supported manually** - the organization was experiencing rapid growth while the existing processes were manually intensive, lacked integration, and each department was leveraging different technologies to complete their planning for FP&A, Merchandise Planning and Supply Chain
- **Anaplan foundation helped but not optimized** - they embarked on an Anaplan journey that started in 2019 to support the vision for a fully integrated and connected business planning approach, it was an improvement over the manual processes previously in place but incomplete in execution
- **Process Optimize Data Feeds** - Anaplan Supply Chain planning models were impacted by a new ERP system necessitating a data & hierarchy restructure of significant number of data sources and planning feeds
- **Difficult Conversions** - One of the biggest challenges with getting live was completing the data conversions from their legacy systems

Solutions

- **Assess existing Anaplan solution and Leverage foundation** - Peloton was brought in to replace previous implementation partner in 2022 to help the organization re-imagine a connected planning vision. Peloton was committed to resuscitating existing models as a time and cost saving measure while adding the necessary functionality to optimize their environment
- **New roadmap was developed** - holistic design approach leveraged existing work where possible, but ultimately drove best practices with thorough documentation to enhance the models and make their process more dynamic. Scope included: *Delivered Demand & Inventory Replenishment Planning Model, Long Range Tops Down Forecast, Open to Buy, New Product Development Forecast Model, Retail Store Forecast, Allocation Model, and In Season Inventory Management Report*

Impact

- **Single Source of Truth via Seamless Integration & Process Automation** - Integrated financial and operational data, encompassing all key business functions which allows resources to focus on value-add analysis
- **Seamless Integration & Process Automation** - Leading to optimal inventory positioning & spend, but also facilitates full transparency to the full team to understand and document methodologies being used to drive the forecast

Retail
Anaplan for FP&A
Merchandise Planning &
Supply Chain Planning