VELOCITY
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25-27 March 2019 | Orlando, Florida
LOGILITY
Demand Solutions
Halo
NGC

Dynamic What-If Scenario Analytics with Halo

Daniel Bachar
Director of Analytics Pre-Sales and Marketing

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Halo – The supply chain intelligence experts

"Trusted data, new insight, better decisions"

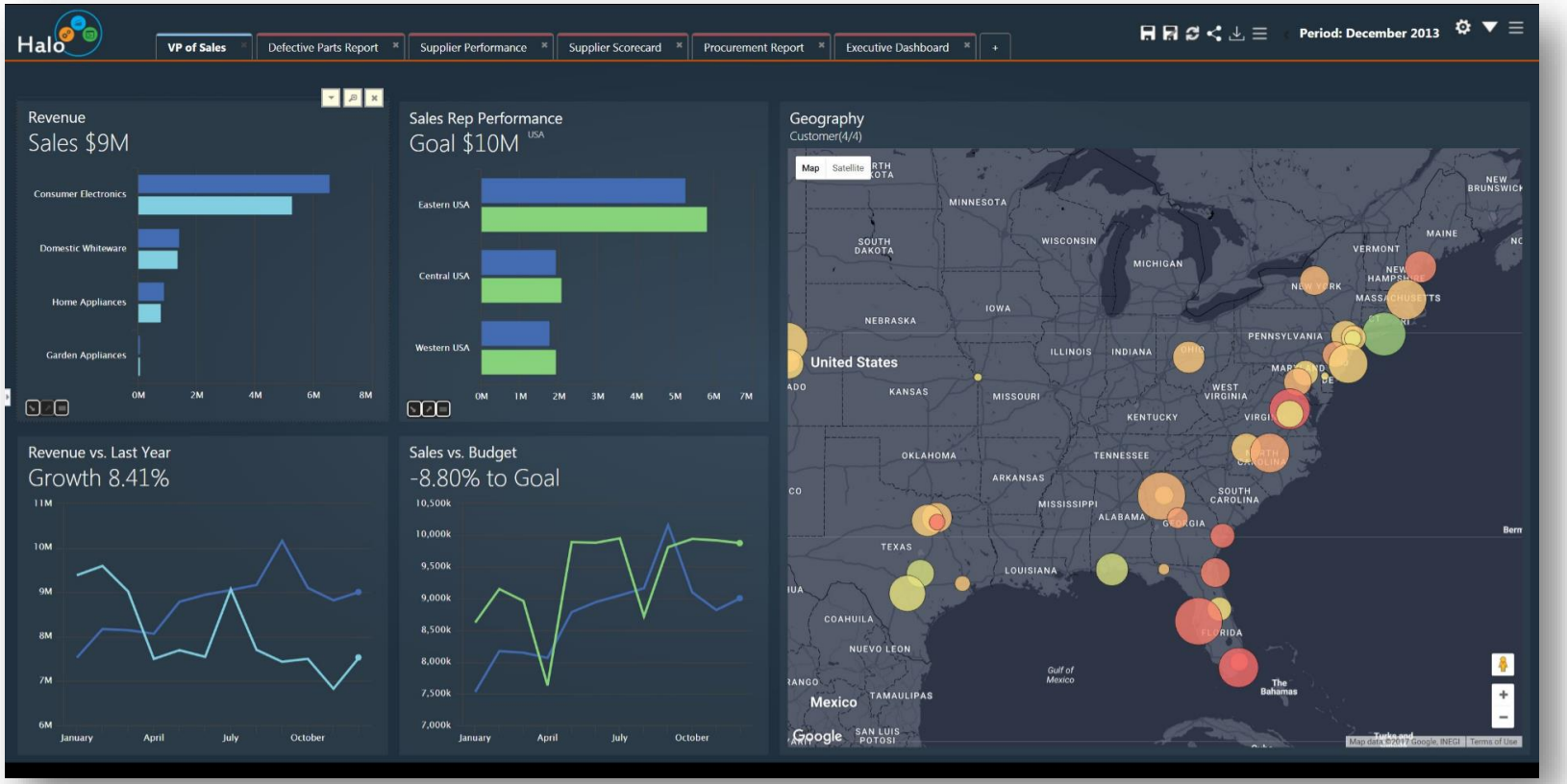
Data integration, analytics software and services

Integrate enterprise data assets

Predict demand: supply problems
and root causes

Optimize your Next Best Action

Automate sequences of actions



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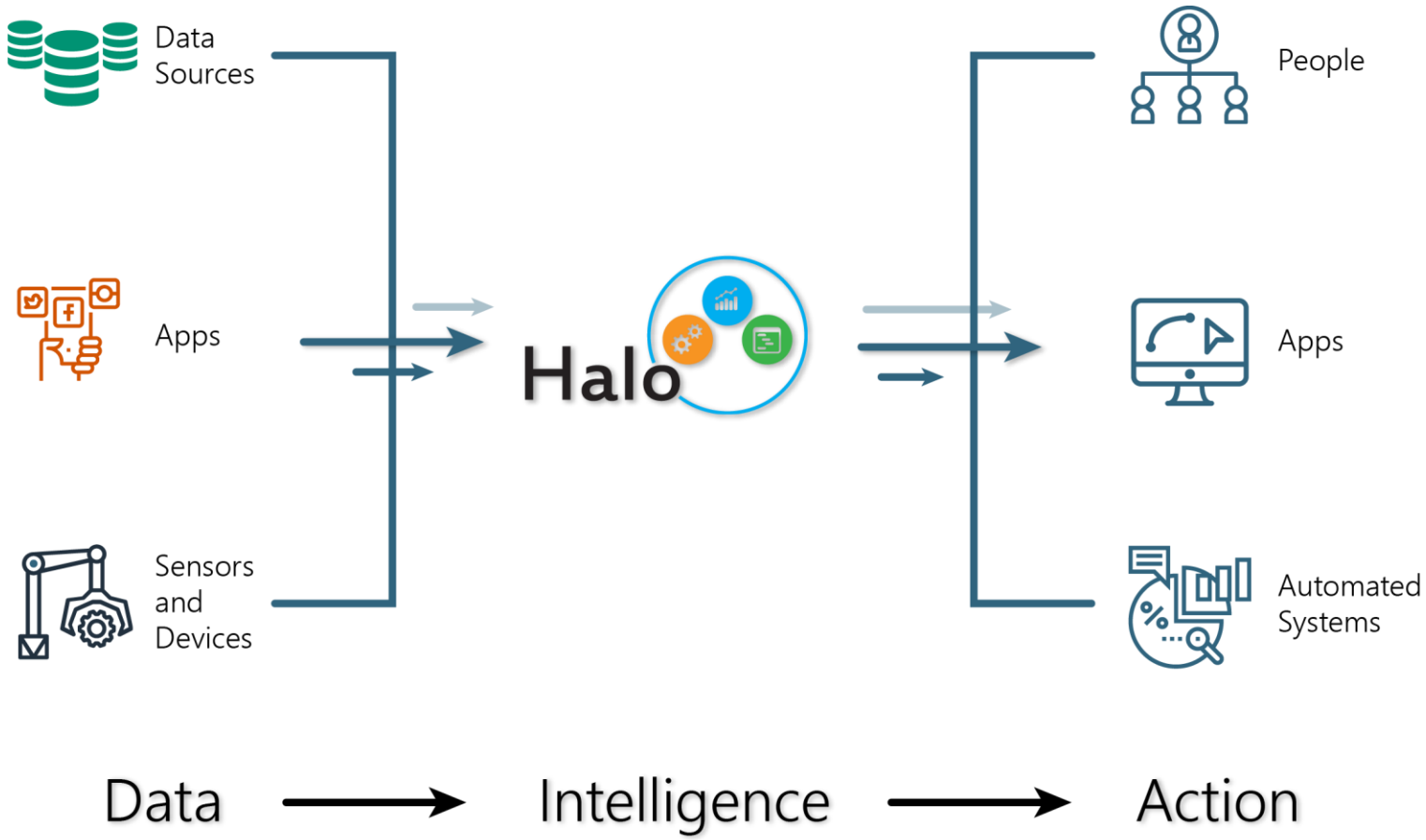
The Halo Platform



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Dynamic What-if Scenario Analytics

A **multi-step** process used to create reliable long term forecasts

- Users can visualize the forecast
- Adjust for multiple scenarios
- Make comments
- Submit consensus analytics scenario for:
  - Demand
  - Replenishment
  - Supply
  - Capacity
  - Budget

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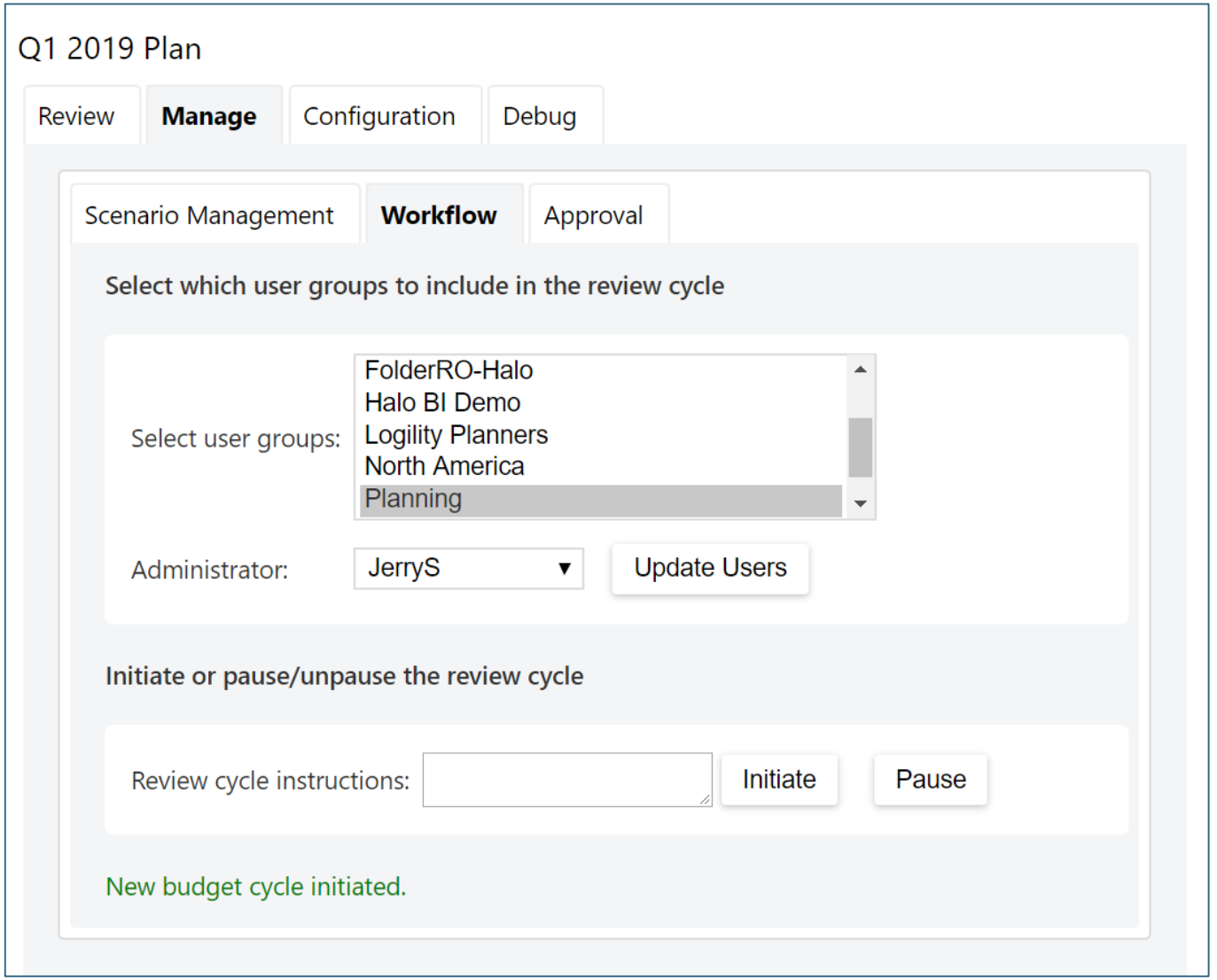
Managers, Planners, Analysts modify the forecast using their knowledge of the future of the business



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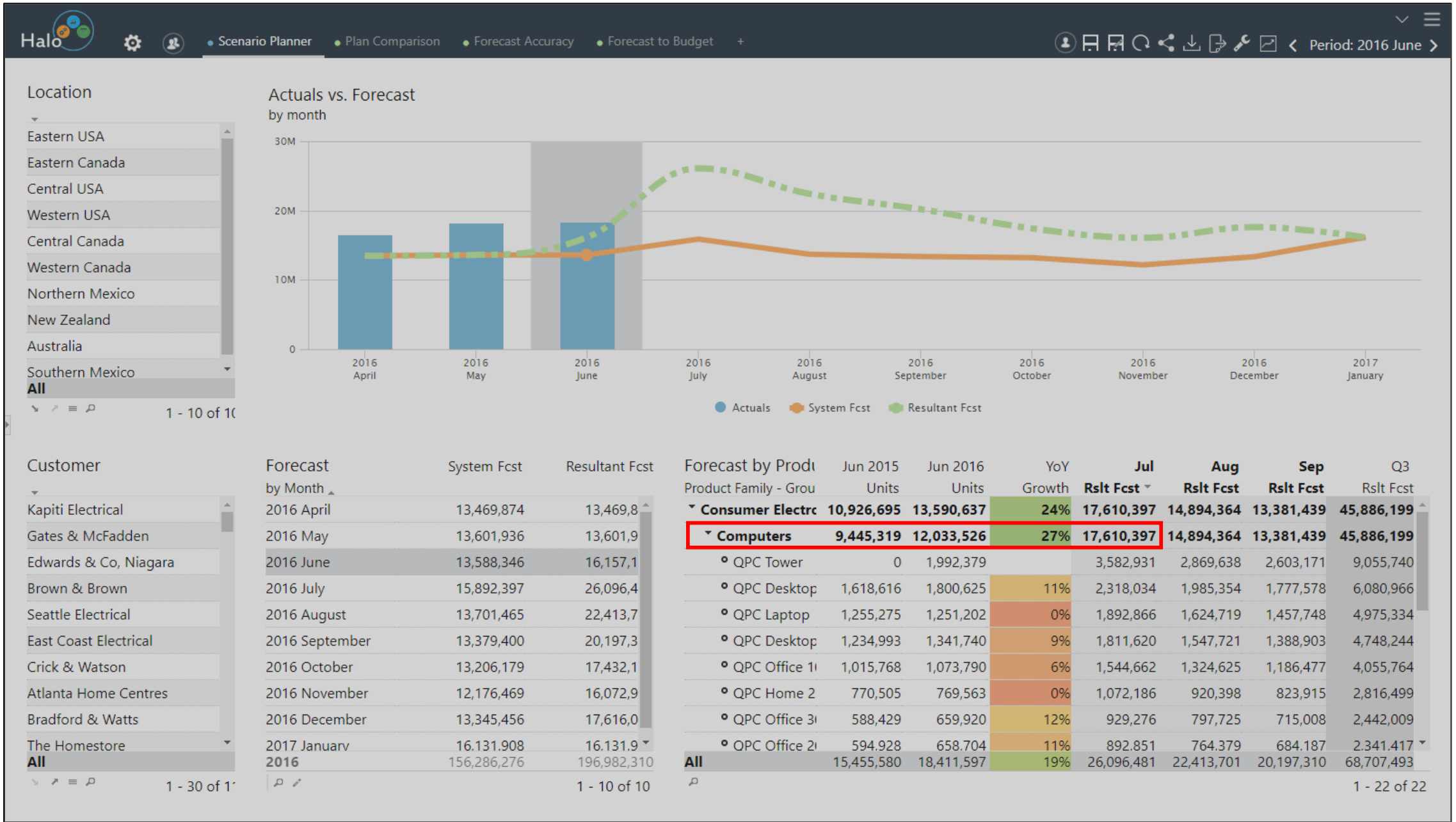
Create weekly, month, quarterly plans to track against



Adjust to a value, by a percent, by an increment or weighted

Forecast by Product Product Family - Group - SKU	Jun 2015 Units	Jun 2016 Units	YoY Growth	Jul Rslt Fcst	Aug Rslt Fcst	Sep Rslt Fcst	Q3 Rslt Fcst
QPC Tower	0	1,992,379		1,705,183	1,460,351	1,438,823	4,604,358
QPC Desktop	1,618,616	1,800,625	11%	1,467,271	1,255,494	1,238,716	3,961,481
QPC Laptop	1,255,275	1,251,202	0%	1,199,547	1,028,508	1,017,060	3,245,116
QPC Desktop Pro	1,234,993	1,341,740	9%	1,145,659	977,939	966,904	3,090,501
QPC Office 1000	1,015,768	1,073,790	6%	977,593	837,537	826,653	2,641,783
QPC Home 2000	770,505	769,563	0%	678,098	581,577	573,614	1,833,289
QPC Office 3000	588,429	659,920	12%	587,663	504,022	497,738	1,589,422
QPC Office 2000	594,928	658,704	11%	564,927	483,198	476,575	1,524,700
QPC Tower Pro	581,922	589,749	1%	528,946	454,794	449,536	1,433,275
QPC Home 1000	512,063	553,817	8%	520,027	445,103	440,277	1,405,406
Laundry 3000 Front-Loader	388,691	416,958	7%	464,824	422,664	386,587	1,274,075
	374,643	391,486	4%	430,877	395,561	359,758	1,186,197
	475,079	482,738	2%	428,439	367,294	363,540	1,159,273
	290,082	346,859	20%	335,983	289,945	270,734	896,662
	15,455,580	18,411,597	19%	15,892,397	13,701,465	13,379,400	42,973,263

123
%
+
v
Spread weighted
Spread equal w/o zero
Spread equal w/ zero
123
February Forecast
1 - 30 of 95

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By Value

By Value is denoted by “123” in the drop down in the tool bar

Allows you to make adjustments to a specific value in the pane that is configured for adjustments.

Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February** **Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	**12,000,000**	0.00	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,799	0.00	0.00
Home Appliances	1,590,810	2,009,068	2,009,068	0.00	0.00
Garden Appliances	175,445	203,959	203,959	0.00	0.00
All	15,562,007	17,552,991	17,552,991	0.00	0.00

123 ▼ 1 - 4 of 4

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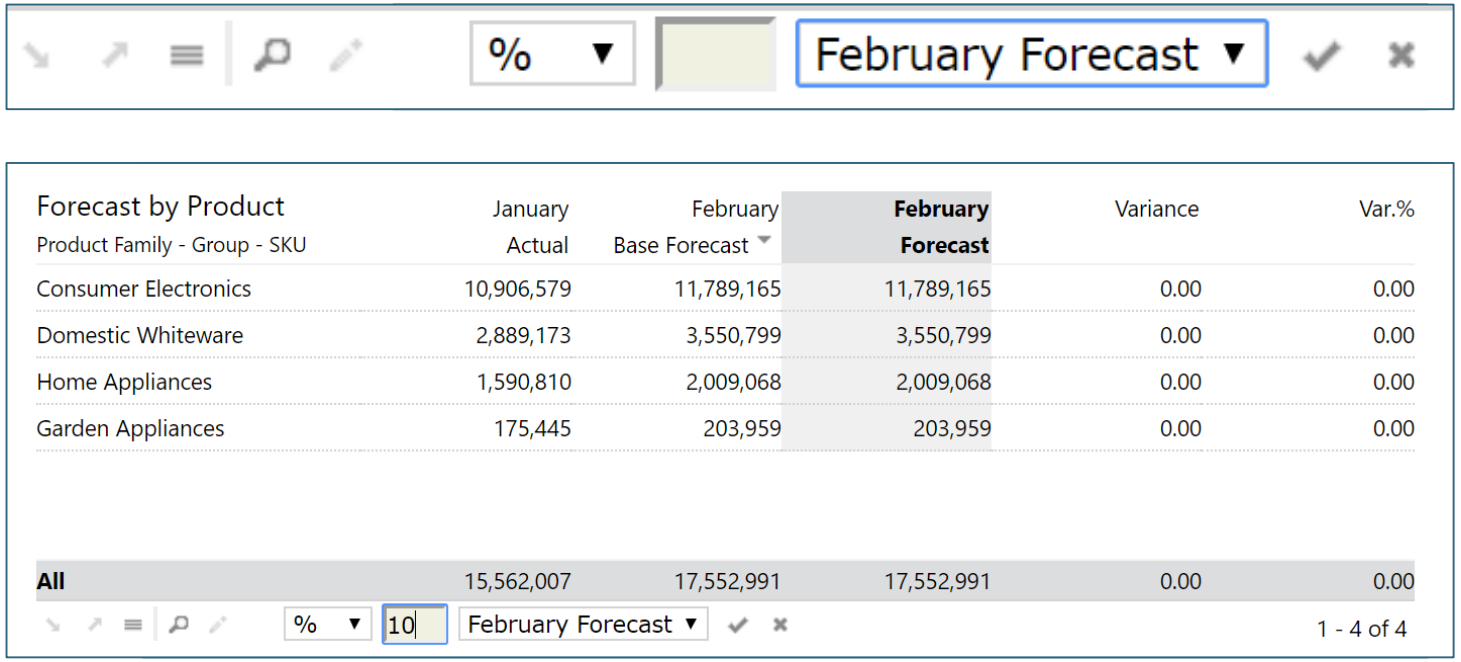
By Percent

By Percent is denoted by a percent "%" sign in the drop down in the tool bar

Allows you to adjust the selected member(s) by a percentage such as increase by 10% or decrease by 25%.



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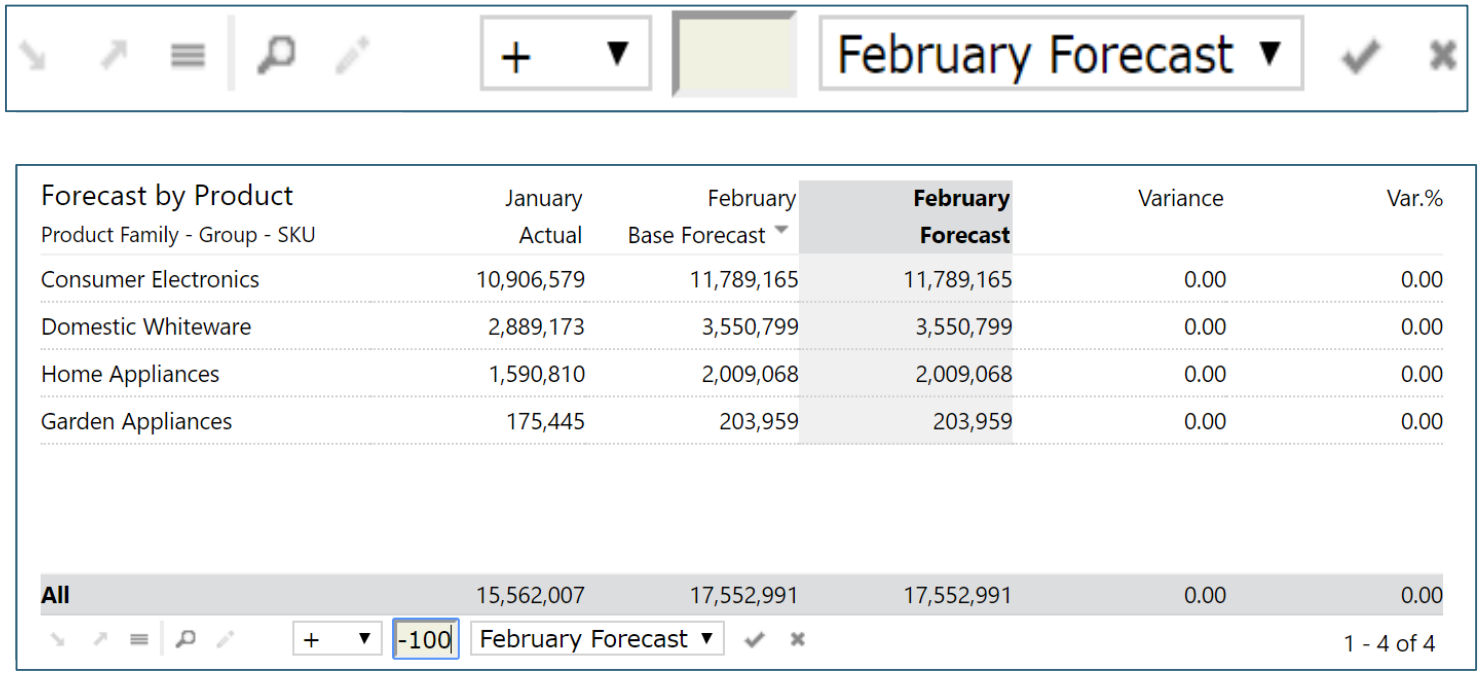
By Increment

By Increment is denoted by a plus "+" sign in the drop down tool bar

Allows you to adjust the selected member(s) by an incremental value such as increase by 50 or decrease by 200.



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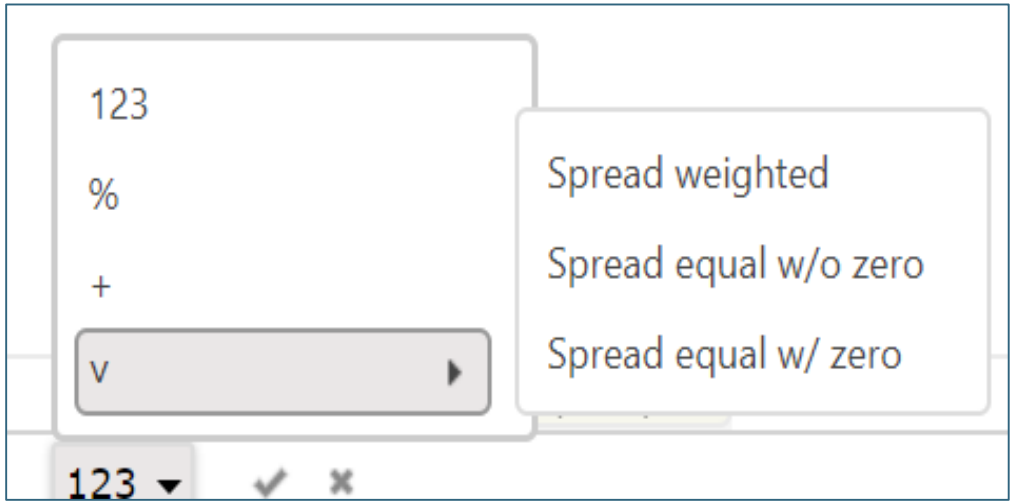
Spread Options

Spread Options

Denoted with a “v” icon Adjustments can be spread across members in the following ways:

- *Spread down weighted*
- *Spread down equal without zero*
- *Spread down equal with zero*



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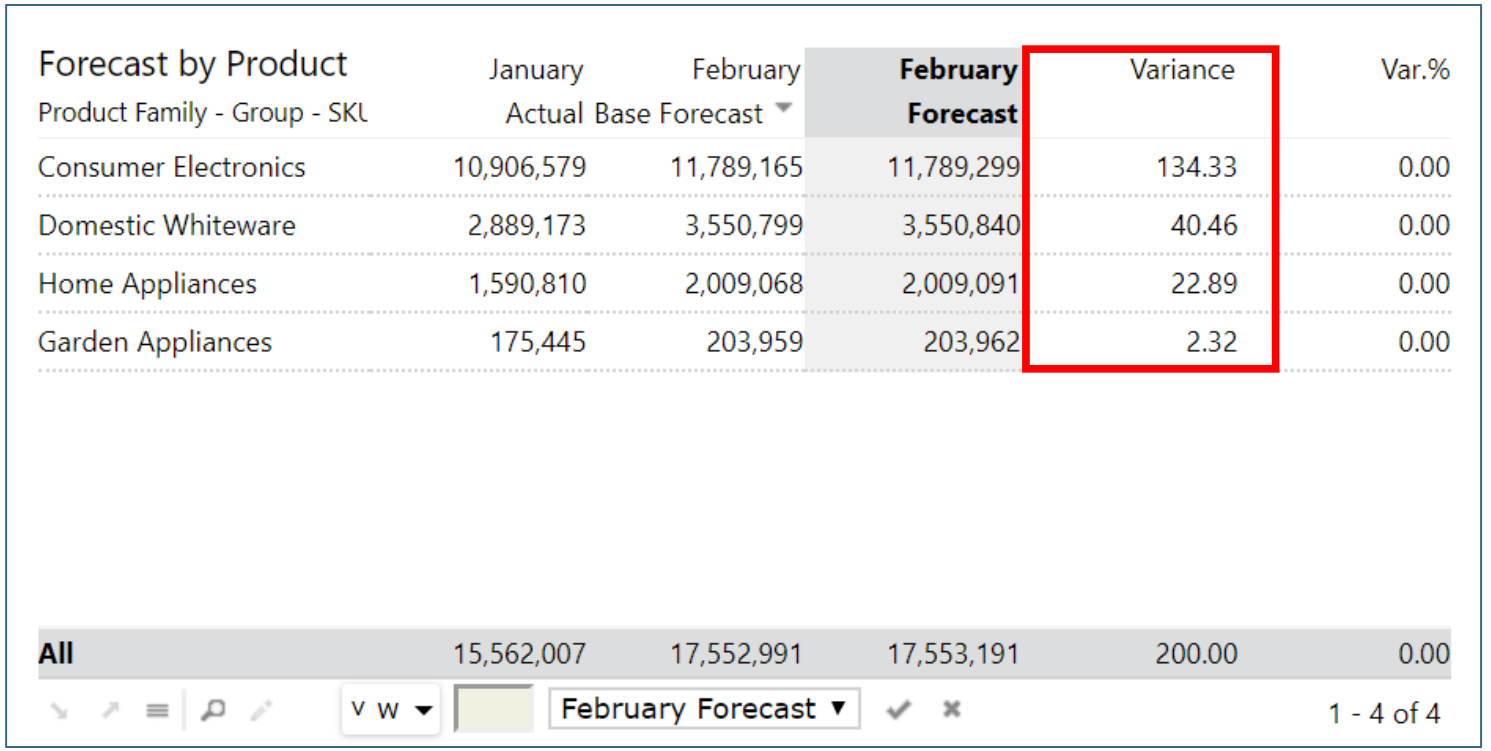
Spread down weighted

Will **weight the adjustment** value according to the values associated with each member.



Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	11,789,299	134.33	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,840	40.46	0.00
Home Appliances	1,590,810	2,009,068	2,009,091	22.89	0.00
Garden Appliances	175,445	203,959	203,962	2.32	0.00
All	15,562,007	17,552,991	17,553,191	200.00	0.00

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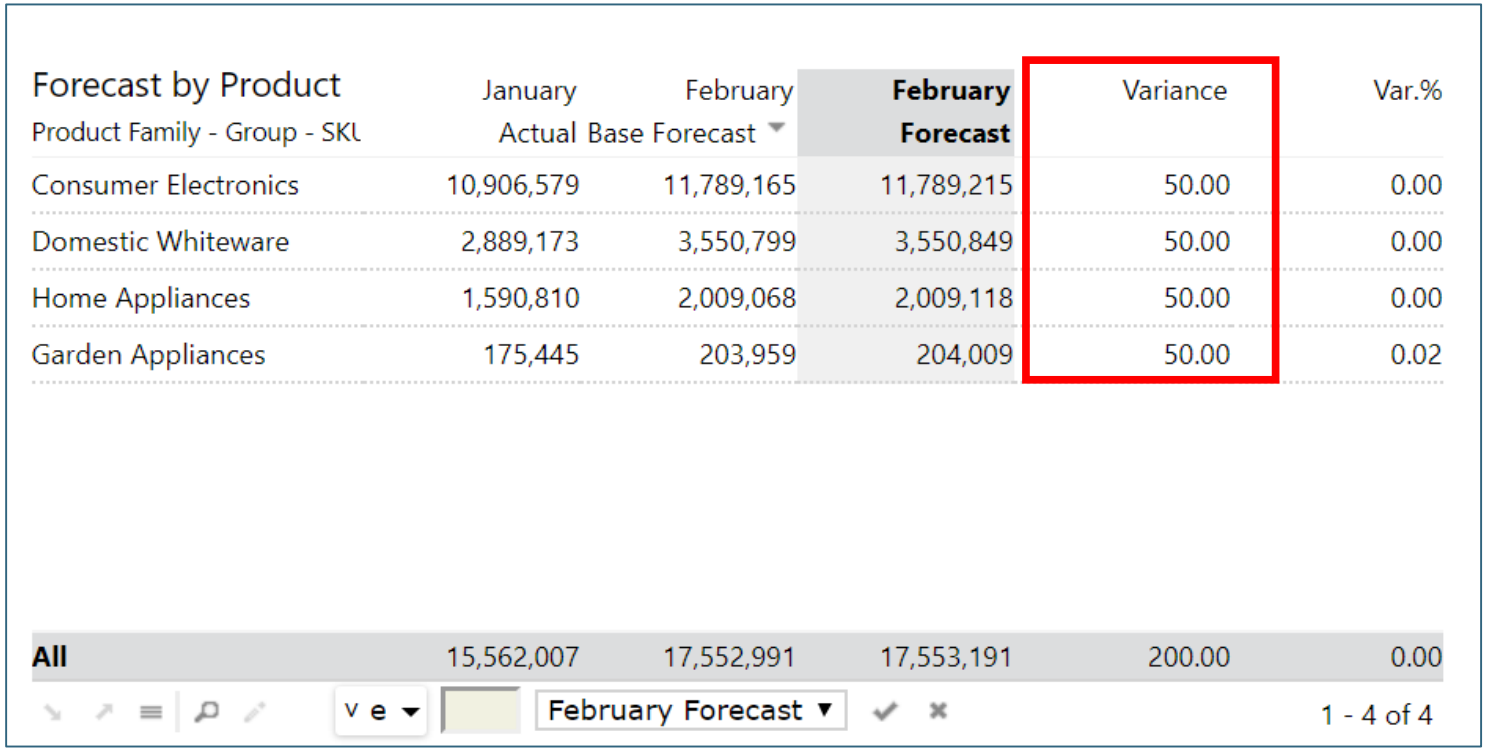
Spread down equal without zero

Will apply the adjustment values **equally** to all members but will **ignore** any members with **zero** values



Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	11,789,215	50.00	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,849	50.00	0.00
Home Appliances	1,590,810	2,009,068	2,009,118	50.00	0.00
Garden Appliances	175,445	203,959	204,009	50.00	0.02
All	15,562,007	17,552,991	17,553,191	200.00	0.00

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Spread down equal with zero

Will apply the adjustment values equally to all members but will **include** any members with **zero** values

Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	11,789,215	50.00	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,849	50.00	0.00
Home Appliances	1,590,810	2,009,068	2,009,118	50.00	0.00
Garden Appliances	175,445	203,959	204,009	50.00	0.02
All	15,562,007	17,552,991	17,553,191	200.00	0.00

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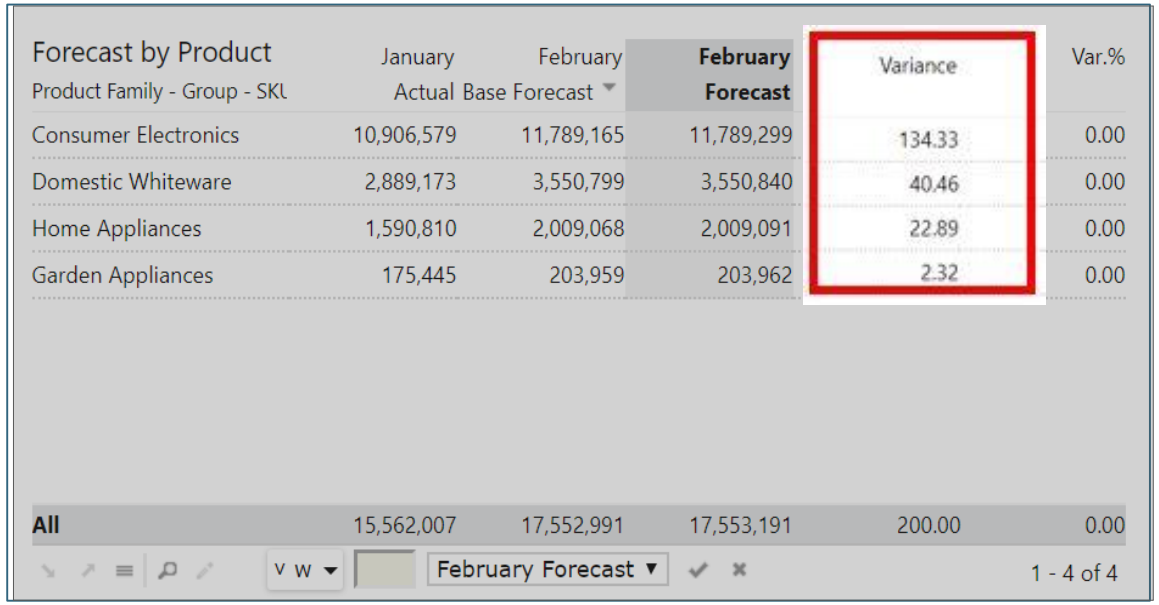
Example

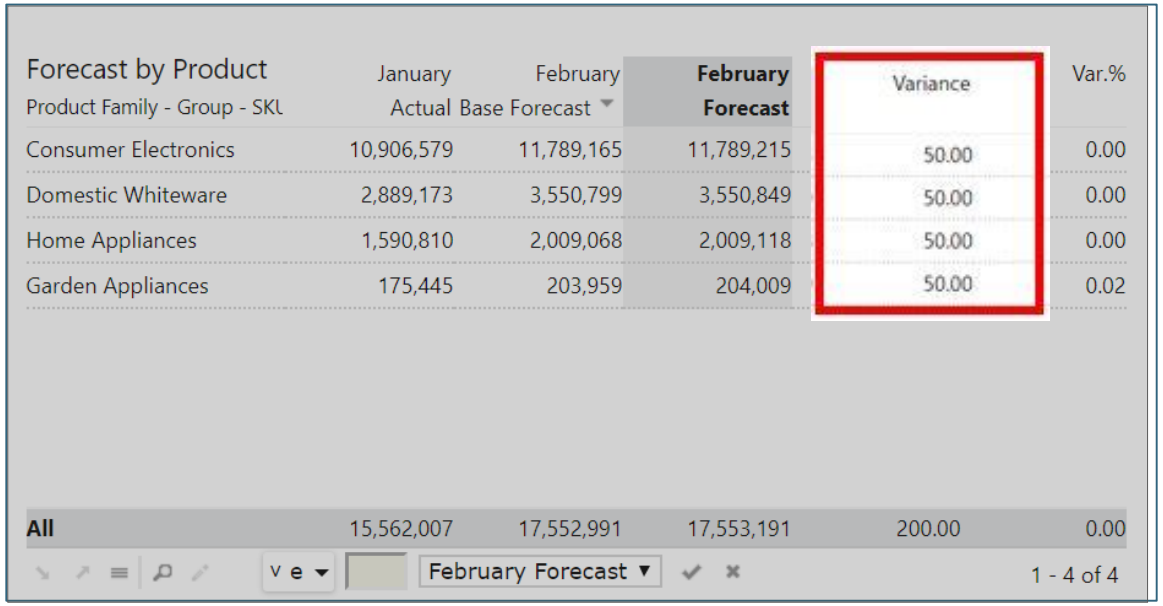
Applying an **adjusted value of 200** will provide the following results



Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	11,789,299	134.33	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,840	40.46	0.00
Home Appliances	1,590,810	2,009,068	2,009,091	22.89	0.00
Garden Appliances	175,445	203,959	203,962	2.32	0.00
All	15,562,007	17,552,991	17,553,191	200.00	0.00

v w | February Forecast | 1 - 4 of 4

Spread down weighted



Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	11,789,215	50.00	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,849	50.00	0.00
Home Appliances	1,590,810	2,009,068	2,009,118	50.00	0.00
Garden Appliances	175,445	203,959	204,009	50.00	0.02
All	15,562,007	17,552,991	17,553,191	200.00	0.00

v e | February Forecast | 1 - 4 of 4

Spread down equal without zero

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Slices and Adjustments

Slices and Adjustments

Slices and adjustments will pertain to the slice that is on the pane.

Forecast by Product Product Family - Group - SKU	January Actual	February Base Forecast	**February Forecast**	Variance	Var.%
Consumer Electronics	10,906,579	11,789,165	11,789,165	0.00	0.00
Domestic Whiteware	2,889,173	3,550,799	3,550,799	0.00	0.00
Home Appliances	1,590,810	2,009,068	2,009,068	0.00	0.00
Garden Appliances	175,445	203,959	203,959	0.00	0.00
All	15,562,007	17,552,991	17,552,991	0.00	0.00

+ ▼ 150 February Forecast ▼ 1 - 4 of 4

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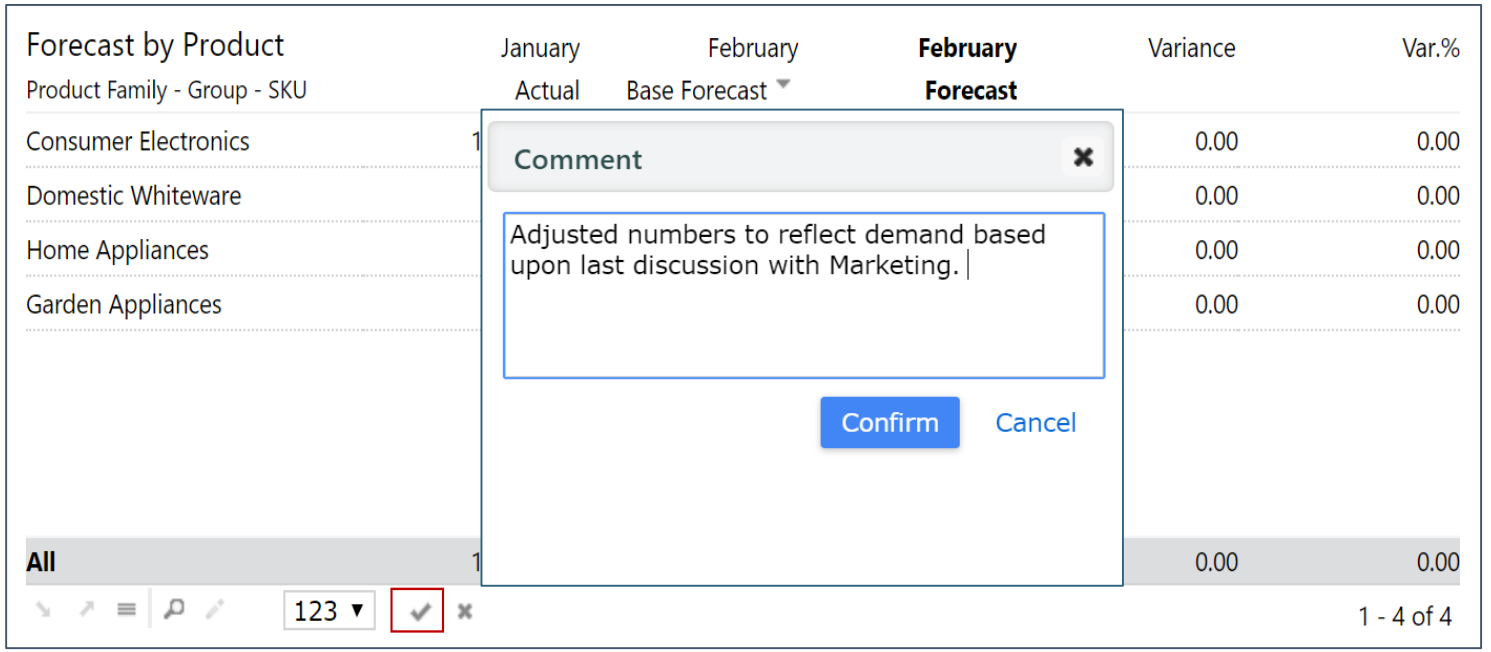
Committing Adjustments

Select the check mark icon on the footer tool bar.



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Review and approvals at the Executive Level take place to finalize various adjustments

Q1 2019 Plan

Review | Manage | Configuration | Debug

Status: Plan in progress

Comments:

Submit | Discard all | Discard previous

Filter by selections | Refresh

Created	User	Member	Context	Time	Measure	Comment	Update Type	Original Value	Final Value	Variance%
1/4/2019 11:42:45 PM	amandas	Garden Appliances		2016 February	Forecast_RevenueForecast	Adjusted numbers to reflect demand based upon last discussion with Marketing.	ToValue	203,959.37	200,000.00	-1.94
1/4/2019 11:42:45 PM	amandas	Home Appliances		2016 February	Forecast_RevenueForecast	Adjusted numbers to reflect demand based upon last discussion with Marketing.	ToValue	2,009,067.75	2,000,985.00	-0.40
1/4/2019 11:42:45 PM	amandas	Domestic Whiteware		2016 February	Forecast_RevenueForecast	Adjusted numbers to reflect demand based upon last discussion with Marketing.	ToValue	3,550,799.42	3,550,700.00	0
1/4/2019 11:42:45 PM	amandas	Consumer Electronics		2016 February	Forecast_RevenueForecast	Adjusted numbers to reflect demand based upon last discussion with Marketing.	ToValue	11,789,164.86	12,000,000.00	1.79

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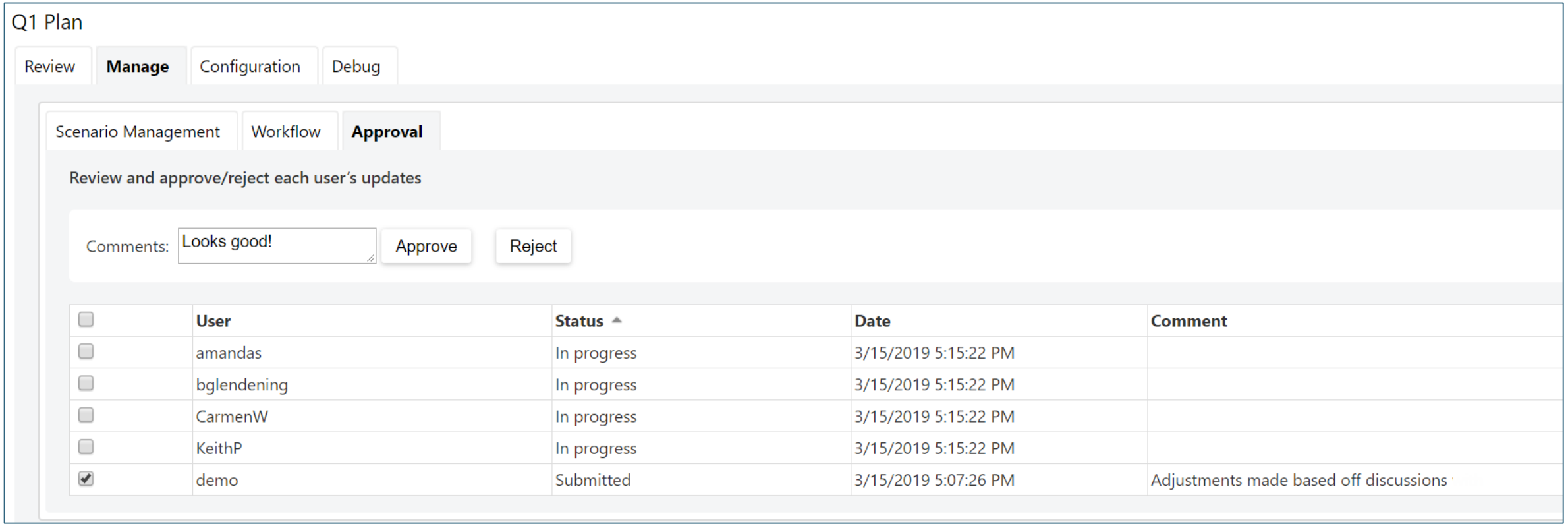
Finalized adjusted forecasts are published as Final Plans



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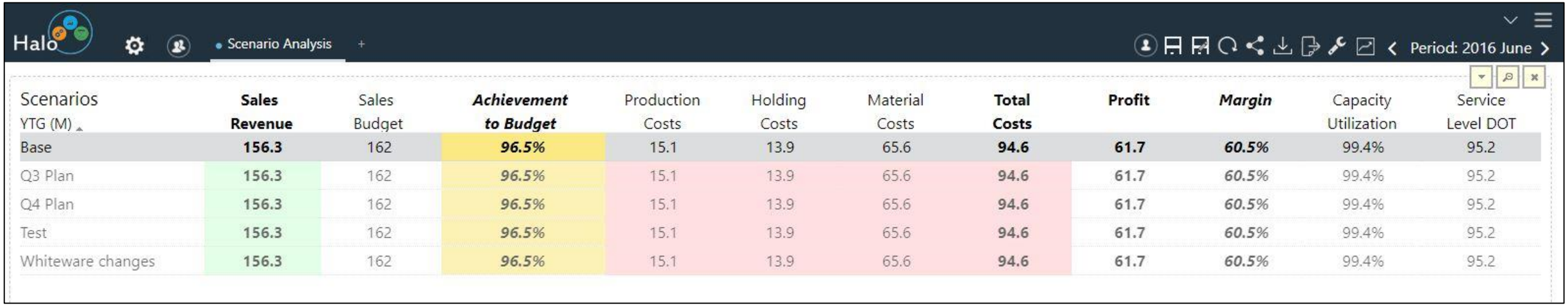
Scenario Analysis Example



Scenarios YTG (M)	**Sales Revenue**	Sales Budget	***Achievement to Budget***	Production Costs	Holding Costs	Material Costs	**Total Costs**	**Profit**	***Margin***	Capacity Utilization	Service Level DOT
Base	**156.3**	162	***96.5%***	15.1	13.9	65.6	**94.6**	**61.7**	***60.5%***	99.4%	95.2
Q3 Plan	**156.3**	162	***96.5%***	15.1	13.9	65.6	**94.6**	**61.7**	***60.5%***	99.4%	95.2
Q4 Plan	**156.3**	162	***96.5%***	15.1	13.9	65.6	**94.6**	**61.7**	***60.5%***	99.4%	95.2
Test	**156.3**	162	***96.5%***	15.1	13.9	65.6	**94.6**	**61.7**	***60.5%***	99.4%	95.2
Whiteware changes	**156.3**	162	***96.5%***	15.1	13.9	65.6	**94.6**	**61.7**	***60.5%***	99.4%	95.2

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Reorder Quantity Automation via Reports and Alerts

- Use **Halo Scheduled Reporting** to distribute reports from Halo on a scheduled basis to both users within the organization as well as external parties.
- With the power of a **built-in alerting** component, Halo Scheduled Reporting can also be configured to distribute certain reports only when a specific pre-set condition within the data has been met.

Period: 2016 Oct

The following data triggered this alert:

Reorder Quantity for any member in Product is > 1

Product	Reorder Quantity
V333 6CS TIE DWN HANDLE ALUM	285
V920BL 6CS PNEUMATIC CLSR BL	174
BOLT EYE W/NUT 5/16"X6"	118
V16 10CS ADJUSTABLE DR SPRING	31
V321WH 5CS VINYL SCREEN DOOR KIT - WHITE, 98053123	28

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See it in Action!

Find Me:

Email: Daniel.Bachar@halobi.com

Slack: danielb

Reach out to your Technical Account Manager (TAM)

Eric Ervin - Mid West, South East

Lars Renteria - Beverage, West, North East

Olly Smith - APAC

THANK YOU