

January 2022

IBM Planning Analytics Overview

Solution for forecasting at Illumina

EMEA Sales Operations Team

illumina®

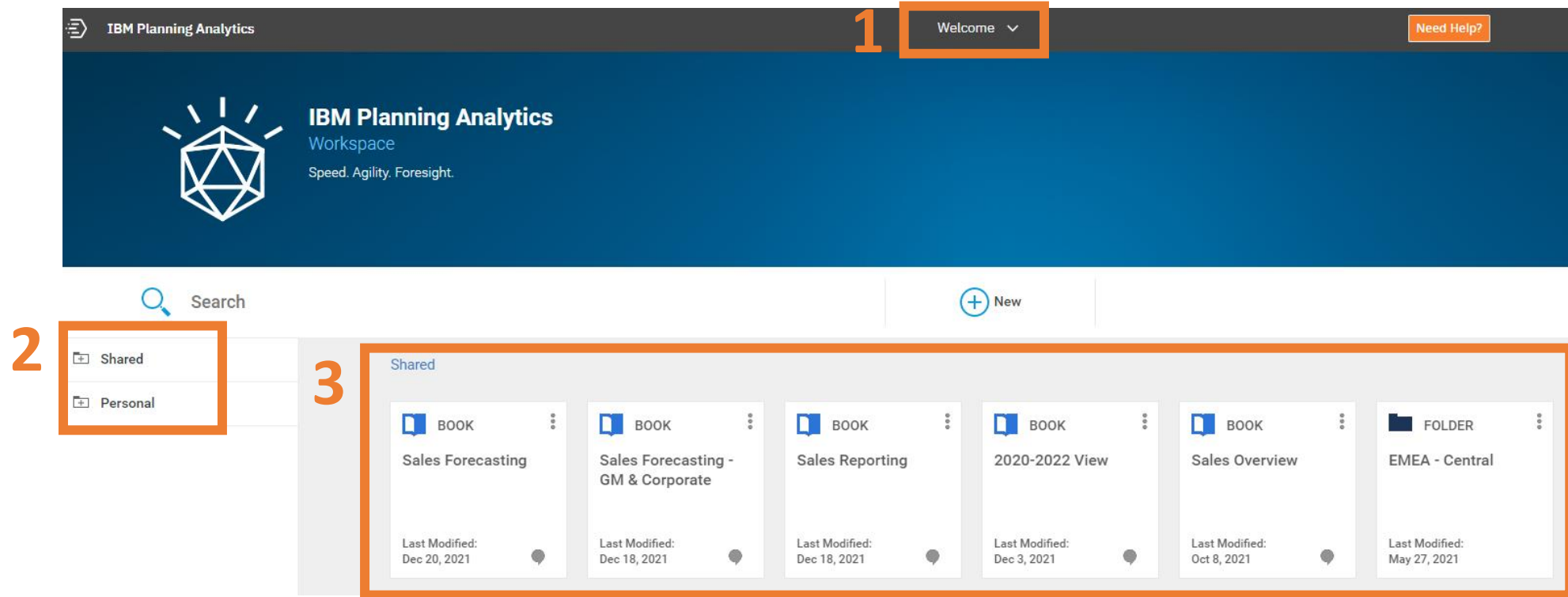
Access IBM Planning Analytics

- Go to <http://go/salesforecast> to get started
- Suggested browser: Google Chrome
 - If you receive error messages or page does not load, please try clearing your browser cache cookies
- Access determined by ETM (Enterprise Territory Management):

Role In Territory	TM1 Sales Forecast	TM1 Service Contract
District Sales Manager	Yes	-
Inside Sales Account Manager	Yes	-
Inside Sales Representative - Service Contract Specialists	Read Only	Yes
ISAM Manager	Yes	-
ISR Service Contract Specialists Manager	Read Only	Yes
Regional Sales Director	Yes	-
Sales Executive	Yes	-
Strategic Account Manager	Yes	-
Territory Account Manager	Yes	-
Sales Ops	Read Only	-
Sales Ops Manager	Read Only	-

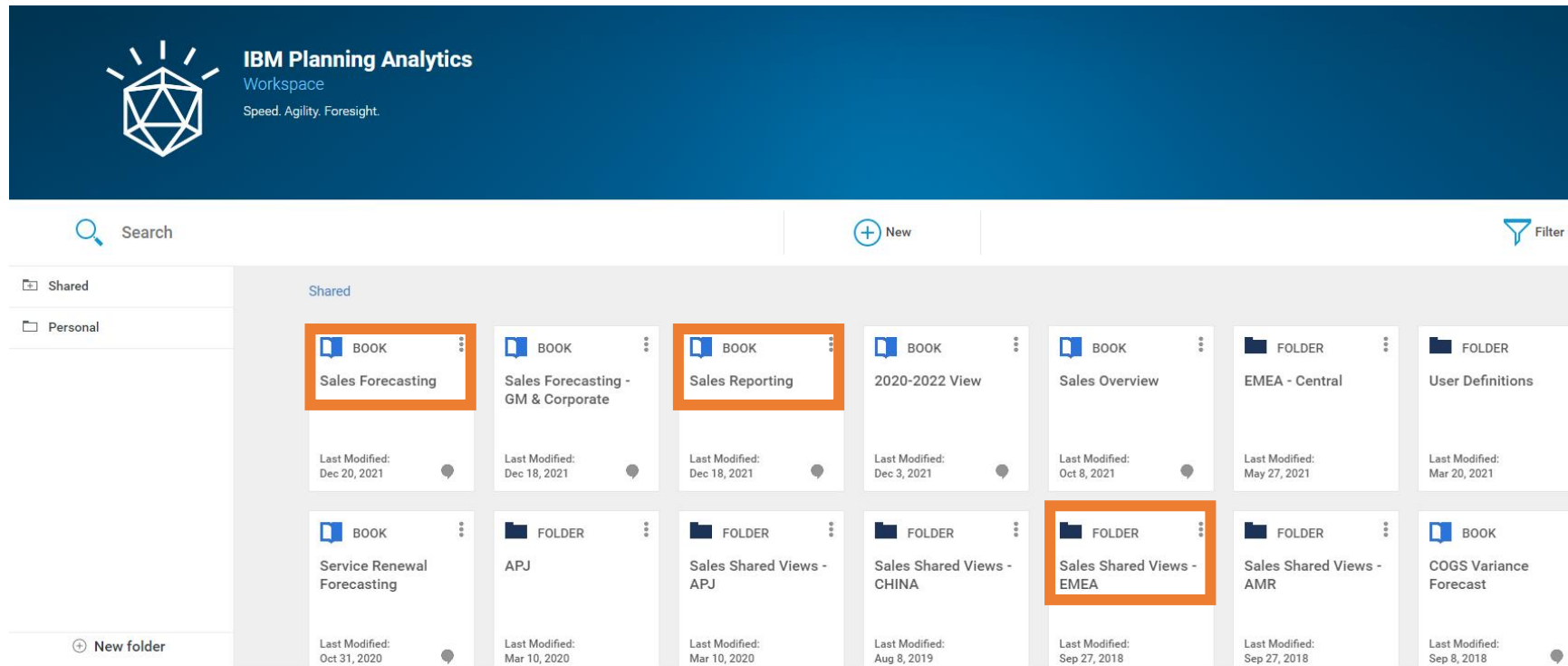
Landing Page

1. Access different open forecast books (i.e., Sales Reporting or Sales Forecasting book)
2. Access your custom views via your personal folder
3. Default books and views you should see upon login



Open Sales Forecasting, Sales Reporting and EMEA Books

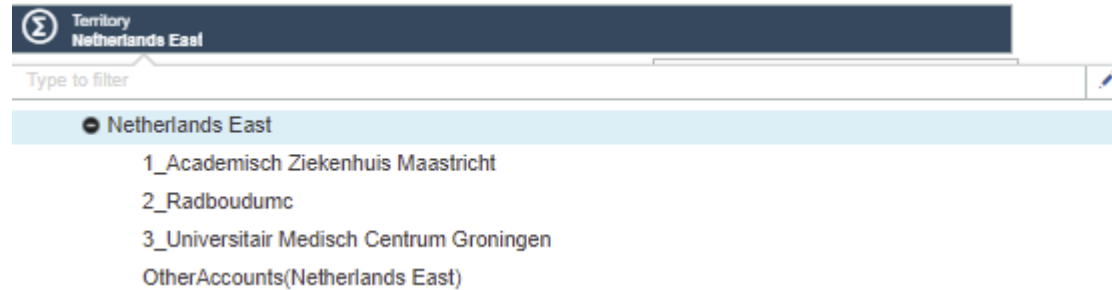
- Sales Forecasting: For forecast entry
- Sales Reporting: Insightful forecast reporting
- EMEA Books/Folders: Pre-set custom views published by Finance



Sales Forecasting Book

What is Account Level Forecasting?

Key Accounts Grouping of accounts in a territory, example:



- Account specific forecasting provides deeper insight/visibility into key drivers of territory activity
- Account specific forecasting is performed for a territory's Key Accounts
 - On UC level, which means that all accounts within a territory will be included if they are part of the same hierarchy
- Maximum 3 Key Accounts can be selected by TAMs with DSM approval
- Key Accounts Grouping will be locked in for a full planning cycle
 - They can be reviewed once per quarter

Entering your Forecast

1. Navigation bar

- Quick way to navigate and select the product to forecast

2. Territory

- Select territory or Key Accounts to view
- Inputs are done at Key Account Level

3. Input Grid

- Input your Orders & Shipment forecast in the editable white cells

4. Rollup vs Forecast

- Rollup to forecast comparison eye chart with rollup breakdown

5. Product Selection

- Click on a product to filter the data in page for the selection

6. Rollup Detail

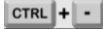
- Opportunity and Backlog Details available on the same page

7. Quarter Selection

- Clicking on a quarter filters the data in the page for the selected quarter

The screenshot displays the 'Instrument Input' interface for forecasting. It includes a navigation bar at the top with tabs for 'Instrument Input', 'Decommissions', 'Consumables Input', 'Surveillance Input', 'Infinium Input', 'Other Input', 'Svc Renewal Input', 'Fcstd Base Warr...', and 'Product Search'. Below the navigation bar, the 'Instrument Input' section shows a table with columns for quarters (Q1-21 to Q2-23) and rows for various input types like 'Order Input Qty', 'Order Input ASP', 'Order Input \$', 'Order Rollup Qty', 'Order Rollup ASP', 'Order Rollup \$', 'Order Ext Wmty Input \$', 'Order Ext Wmty Guideline', 'Beg Backlog Qty', 'Ship Input Qty', 'Ship Input ASP', 'Ship Input \$', 'Ship Rollup Qty', 'Ship Rollup ASP', 'Ship Rollup \$', 'Ship Ext Wmty Input \$', 'Ship Ext Wmty Guideline', and 'Reagent Rental Qty'. To the right of the table is a 'Rollup vs Forecast (Units)' chart showing 'Orders' and 'Shipments' with 'Actual' (blue), 'Forecast' (orange), 'Backlog' (green), 'PO Received' (purple), 'Forecasted' (red), and 'At Risk' (yellow) measures. Further right is a 'Product Selection' list with items like 'NovaSeq 6000', 'NovaSeq 6000 CN Berry', 'NovaSeq 6000 CN', 'HiSeq 4000', 'Refurbished HiSeq 4000', 'HiSeq 3000', 'HiSeq 2500', 'Refurbished HiSeq 2500', 'HiSeq 2000', 'Refurbished HiSeq 2000', and 'HiSeq 1500'. Below the chart is a 'Quarter Selection' list with options for 'Q1-22', 'Q2-22', 'Q3-22', 'Q4-22', 'Q1-23', and 'Q2-23'. At the bottom, the 'Opportunities' section shows a table with columns for 'Close Qtr', 'Fcat Category', 'Order \$', 'Order Qty', 'Ship In Close Qtr \$', 'Ship In Close Qtr Qty', 'Stage', 'Rev Rec Terms', and 'SFDC Link'. The 'Backlog Due' section shows a table with columns for 'Total BL Due Qty', 'Total BL Due \$', 'BL Due Qty in Qtr', 'BL Due \$ in Qtr', and 'Rev Rec Terms'.

Forecasting Helpful Tips

- The forecasting tool looks best in 1080p screen resolution
 - If your screen has a lower resolution use  to fit the content to the screen and avoid scrolling
- Infinium Methylation products are in ASP and Samples
- Consumables Rollup does not include calculated turns
- Actuals and Rollup show Net Shipments

Sales Reporting Book

Finding your way around

Territory Summary



- Rollup vs Forecast Summary by Territory, Instruments Units and Consumables
- Top Commit/Upside Opportunity & Backlog

Actuals Trends



- 9 Qtr trends shown by Instruments, Consumables and Services & Other
- System units & \$ trends shown

Pull Through Trends



- 9 Qtr Pull Through/Install base trends by SQ platform arranged by HT and BT

Forecast Accuracy



- Chart comparing Budget, M1 (W1), M2 (W5), M3 (W9), Current forecast versions against actuals

Variance Commentary

Category	Current	Forecast	Variance
Instrument	1,000,000	1,000,000	0
Consumables	500,000	500,000	0
Services	250,000	250,000	0
Other	250,000	250,000	0

- Provide commentary on the variance of current forecast to prior version for review with DSM or above

Forecast Review

Category	Forecast	Actual	Variance
Instrument	1,000,000	1,000,000	0
Consumables	500,000	500,000	0
Services	250,000	250,000	0
Other	250,000	250,000	0

- Consolidated view to review forecast with ability to slice and dice

Surveillance Review

Category	Forecast	Actual	Variance
Instrument	1,000,000	1,000,000	0
Consumables	500,000	500,000	0
Services	250,000	250,000	0
Other	250,000	250,000	0

- Consolidated view to review surveillance forecasting data with ability to slice and dice

Detail Data

Category	Forecast	Actual	Variance
Instrument	1,000,000	1,000,000	0
Consumables	500,000	500,000	0
Services	250,000	250,000	0
Other	250,000	250,000	0

- Opportunities, Orders, Backlog & Shipment details down to order level for Slice & Dice analysis

Reporting Helpful Tips

- Instant Analytics
 - You do not need to wait for burst reports to be sent or Tableau refresh schedules to get updated reporting
- Use reporting to ensure you are not double counting forecast in 'Other Accounts' grouping node
- Open Opportunity Detail – available down to Product, Customer, Stages, Forecast Category and Opportunity Id
- Backlog Details – available down to Product, Customer, Plan GI Date and Order Line Id
- Access regional default views for insightful reporting

Data Refresh

- Data refresh frequency: **3 times per day**
 - Opportunities, Orders, Backlog Due and Shipments

<i>UK & Ireland</i>	10:00 AM, 09:00 PM, 03:00 AM GMT (UTC)
<i>Central Europe</i>	11:00 AM, 10:00 PM, 04:00 AM CET (UTC+1)
<i>Eastern Europe</i>	12:00 PM, 11:00 PM, 05:00 AM EET (UTC+2)
Further Eastern Europe	01:00 PM, 12:00 AM, 06:00 AM FET (UTC+3)

- Forecast data within IBM Planning Analytics (*TM1*) is always **real-time**

Sales Forecast Input – Quick Reference Guide (Windows)

Shorthand

“K” = Thousands

Type “984K” and click Enter

“M”= Millions

Q3-18	Q3-18
984K	\$984,000

Copy Paste

Copy **Paste**

Q4-18	Q1-19	Q4-18	Q1-19
Copy \$95,000	Paste Here	\$95,000	\$95,000

Copy to Multiple Cells

How to copy the same value to all the cells on the right.
e.g., Type “>185K” on the input cell and click enter.
The value will be copied to all the cells to the right.

Q3-18	Q4-18	Q1-19	Q2-19
>185K			
	Q3-18	Q4-18	Q1-19
	\$185,000	\$185,000	\$185,000

illumina®

Search

Click on the Product Label name.
Click on the magnifying glass icon



Type in the box for the
product of interest

< Search

Q Search

Product Selection

NovaSeq Consumables

HiSeq X Consumables

HiSeq HD Consumables

Click on the desired
product item

Expand & Collapse

Use the to expand grouped content

Use the to collapse grouped content

Order Input \$	Order Input \$
Order Rollup Qty	Order Rollup Qty
Order Qty QTD	Order Qty QTD
Order Commit Qty	Order Commit Qty
Orders Rollup ASP	Orders Rollup ASP

Adjust Screen Size

Use keys to Zoom Out the screen
Size or use keys to Zoom In the screen
size and fit the content to the size of your screen.

Export to Excel

Use the action menu to export to excel.

Click anywhere on the object to filter so you see
the icon:



Click on the blue box to open the action menu:



Click on icon to Export.

Follow instructions to export to Excel



Save s Data Sheet View

Click on the blue box to open the action menu.

Click on the Save Icon



- Name the view
- Click on ‘Personal’ folder
- Click Save

Save view as

Name
Text

Tags

Description

Location
☐ Shared
☒ Personal

Note: Permissions for the view will be inherited from the folder it's saved to.

Save Cancel

Sales Forecast Input – Quick Reference Guide (MAC Friendly)

Shorthand

“K” = Thousands

Type “984K” and click Enter

“M”= Millions

Q3-18
984K



Q3-18
\$984,000

Copy Paste

Copy

Command ⌘ + C

Paste

Command ⌘ + V

Q4-18	Q1-19
Copy \$95,000	Paste Here




Q4-18	Q1-19
\$95,000	\$95,000

Copy to Multiple Cells

How to copy the same value to all the cells on the right.
e.g., Type “>185K” on the input cell and click enter.
The value will be copied to all the cells to the right.

Q3-18	Q4-18	Q1-19	Q2-19
>185K			



Q3-18	Q4-18	Q1-19	Q2-19
\$185,000	\$185,000	\$185,000	\$185,000

illumina®

Search

Click on the Product Label name.
Click on the magnifying glass icon



Type in the box for the
product of interest

< Search

Search

Product Selection

NovaSeq Consumables

HiSeq X Consumables

HiSeq HD Consumables


Click on the desired
product item

Expand & Collapse

Use the  to expand grouped content

Use the  to collapse grouped content

Order Input \$
Order Rollup Qty
Order Qty QTD
Order Commit Qty
Orders Rollup ASP



Order Input \$
Order Rollup Qty
Order Qty QTD
Order Commit Qty
Orders Rollup ASP

Adjust Screen Size

Use Command ⌘ + - keys to Zoom Out the screen
Size or use Command ⌘ + + keys to Zoom In the screen
size and fit the content to the size of your screen.

Export to Excel

Use the action menu to export to excel.

Click anywhere on the object to filter so you see
the icon:



Click on the blue box to open the action menu:



Click on icon  to Export.

Follow instructions to export to Excel



Save s Data Sheet View

Click on the blue box  to open the action menu.

Click on the Save Icon



- Name the view
- Click on 'Personal' folder
- Click Save

Save view as

Name

Test

Tags

Description

Location

Shared

Personal

Save Permissions for the view will be inherited from the folder it's saved to.

Save Cancel

Need Help?

Contact salesops_EMEA@illumina.com