Functional Design Document

Client:

Project: Space Planning Business Design Document

**(This entire document is a SAMPLE only – Please review and design according to the customer’s requirements. DELETE all comments like this throughout the document, in RED.)**

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### Functional / Solution Design Document

### Document Purpose (SAMPLE – review and design according to customer requirements)

The client will implement and complete the merchandising process in conjunction with Space Planning. Users will work directly in the cloud Space Planning environment to complete the merchandising process. Users will then post the planograms through Web Publisher for the stores to access and retrieve.

### Document Owner

The owner of the Functional / Solution Design Document is the Business Solution and Technology Solution Team.

### Document Contributors

The people contributing to the Functional/Solution Design Document are the project Blue Yonder Business Solution and Technical Solution teams, Client Business Team, Client Technical Team, and Client Project Sponsors.

### Document Audience

The audience for the Functional/Solution Design Document is everyone involved in the project. This document should be referred to for requirements at any time. Once approved by the client, the only way to change the requirements noted in this document is via an approved, change request form.

**This page should be removed prior to reviews with the Client and distribution**.

# Project Information

## Project Management Information

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| --- | --- |
| **Client:** |  |
| **Project Name:** |  |
| **Blue Yonder Project Manager:** |  |
| **Blue Yonder Client Partner:** |  |
| **Date:** |  |

# Functional/Solution Design Document Revision History

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| Document version | Revision date | Author | Revision description |
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# The Project (SAMPLE ONLY - make project specific)

## Project Overview

The client will implement and complete the merchandising process in conjunction with Space Planning. Users will work directly in the cloud Space Planning environment to complete the merchandising process. Users will then post the planograms through Web Publisher for the stores to access and retrieve.

## Project Criteria for Success (SAMPLE – review and design according to customer requirements)

The implementation will assist in labor/time savings using the new tools. There will be a higher level of granularity achieved, with overall space gains for the client’s categories and portfolio. The improved Data Efficiencies and Just-In-Time access to POGs and products on the shelf will be utilized more efficiently, helping to evaluate the client’s portfolio space growth. Overall, the client’s stores and customers will be supported by the space planning tool / usage, creating a greater synergy within the organization.

## Project Requirements In-Scope (SAMPLE – review and design according to customer requirements)

* + Improve and drive efficiencies in the Planogram building process. The next step is developing the ability to create multiple versions of planograms (linear, assortment, etc.). Ability to identify changes to Planograms
  + Ability to replicate planograms
  + Ability to merchandise planograms based on defined merchandising criteria
  + Ability to planogram fixture/SKU graphics
  + Ability to provide Planogram Reports
  + Ability to provide SKU In/out Reports
  + Ability to provide SKU New/Deleted from POG Reports
  + Ability to provide Location Reports
  + Ability to track changes to planogram
  + Resets within POG will have beginning and end date
  + All changes in POG are time stamped and communicated to the stores with clear process steps
  + POG tool will allow for versioning
  + POG versions will include Draft version- WIP, Internal Review version- QC, Internal review update version- Approved, and final version- Live

## Project Requirements Out-of-Scope (SAMPLE – review and design according to customer requirements)

* + Stores will have methods within POG application to request additional fixtures (e.g. store had product to display [if fixture was available])
  + Ability to leverage planogram capacity data to drive replenishment

## Project Phases/Milestone Sign-offs (SAMPLE – review and design according to customer requirements)

* + Prepare
  + Design / Sign Off
  + Construct
  + Validate / Sign Off
  + Deploy / Sign Off
  + Transition

## Functional Design Assumptions

## General Assumptions

* **Assumptions (SAMPLE – review and design according to customer requirements)**
  + Implementation will occur in a continuous manner without interruption or stops
  + There will be limited modifications to the base Blue Yonder (BY) products or modules being implemented
  + All Construct and Validate Phase Services / Activities and Deliverables must be in support of the client’s approved Solution Design. Any requirements beyond this must first be supported by a fully executed Change Request and then supported by an updated client’s approved Solution Design before any BY effort will be performed
  + Data required to support the Implementation, determined and agreed to during the Design Phase, to be cleaned and extracted / sourced by the client’s Project Team. BY integration estimates assume that this data will be sourced and provided by the client’s Project Team via the BY inbound tables, and does not consider any time for data cleansing or extracting from the client’s systems
  + This project covers the configuration and development of integration from BY to BY applications and modules

## Business Assumptions

* **Assumptions (SAMPLE – review and design according to customer requirements)**
  + After this project is implemented, Cloud Services may make minor code changes to resolve issues according to their standard ticketing and change management procedures. However, any other change, including changes where the code is working as designed but is not working as desired, may require an engagement of Consulting Services. Therefore, it is crucial that this Design document is carefully reviewed and that the users are fully engaged with the testing process.
* **Constraints**
  + New product creation tool for marketing material will be live prior to JDA testing stage

## Environment Assumptions

* **Assumptions (SAMPLE – review and design according to customer requirements)**
  + BY will have access to the client’s systems
  + The following environments will be established to support the construction and deployment:
  1. Development (DEV): What BY would call a sandbox? This will be exclusively a testing and development ground
  2. User Acceptance Testing (UAT): This environment should match PROD in every way possible. Once the implementation plan has been rehearsed, tweaked and perfected in DEV, it should be run in the UAT environment, with the idea being when the users sit will see day 1 of go-live
  3. Production (PROD): When UAT is completed and passed, the exact same implementation plan will be run in PROD

## Data Assumptions

* **Assumptions (SAMPLE – review and design according to customer requirements)**
  + The client will ensure that data to be captured, compatible and “cleansed” to the standards needed to support the Space Management Teams

## Hardware and Software Assumptions

* **Assumptions (SAMPLE – review and design according to customer requirements)**
  + All required hardware will be provided on or ahead of time per the Project Plan

# Functional Design Details

## Functional Design - Space Planning with Web Publisher

## Functional Requirements: Planogram Process and distribution

**Functionality Space Planning Overview (SAMPLE ONLY make project specific)**

BY Space Planning delivers visual reality for three-dimensional merchandising displays and advanced fixturing. Space Planning enables users to manage planograms that include custom fixtures and curved shelves, as well as slat walls complete with signs and textures. Beyond merchandising aesthetics, the solution helps users match merchandise strategy with the way that consumers shop – by brand, flavor, product complement or any other key product attribute. For increased agility and streamlined planning activities, Space Planning enables users to manage multiple planograms simultaneously.

# Assortment (SAMPLE ONLY make project specific)

* **Current State**

The current planogramming process at the client is a collaborative effort. The Buying Office drives the assortment process based on one of the following: vendor's bringing new products, seasonal changes and poor performance of current products. Merchandising provides fixture configurations based on floor plan layout / flow and Visual merchandising pulls all of that information together and builds computerized planograms in Space Planning for distribution to stores. The client is maintaining 478 PSA files, including promotional end caps for approximately 600 stores. Categories not supported with planograms are:

* + Hard line
  + Soft line
  + Dairy
  + Frozen
  + Health & Beauty Care

Divisional Merchandising Managers and Buyers all have input in the assortment planning process. New product introduction decisions for items are typically made at the Buyer level with Divisional Merchandising Manager approval. New items are added, or poor performance items are discontinued almost daily and the product listing for retail product is approximately 200,000 active products. Some of the factors that can trigger an assortment evaluation include:

* + New product introductions
  + Discontinued products
  + New /discontinues product lines
  + Product secessions - vendor consolidation
  + Underperforming products, class
  + Competition
  + Line Reviews
  + Delayed products
  + Holiday and Special Events

When an assortment review occurs, the Buyers and Assistance Buyers perform most of the analysis that determines which products will go on the shelf. Buyers are provided with sales data in an Excel format that rank products at the product and class levels. Factors taken into consideration when evaluating the assortment include:

* + Sales (unit movement)
  + Sales dollars
  + GMROI
  + Turns
  + Inventory
  + Price Point
  + Capacity
  + Regional locations
  + Vendor Analysis

Once an assortment is determined, several other factors are taken under consideration for purposes of allocating space. The dissemination of information to visual merchandising is not consistent; every buyer has a different process. Some of the various ways are; meetings, paper, or email.

**Common Practices**

The Common Practices Category management business model / process is defined as follows:

tpg1

Source: Joint Industry Project on ECR

Define a Category Management Calendar around the above business model. This will streamline planogram changes and improve distribution and execution of planograms as well as reduce amount of re-work

* + For the Performance Review, financial data is loaded into the planogram via the links between the store, planogram and item data
  + Space-related metrics can then be evaluated
  + This can be done via reports, charts or highlights within the Space Planning application
  + Periodic scheduled reviews of planograms and item performance within a planogram should be established
  + Preferred metrics would employ space to sales, Days of Supply (DOS) and GMROII in analyzing item performance and assortment
  + Market information, consumer preferences and vendor support can be incorporated to aid identifying correct assortment
  + Planogram analysis should integrate with the category management process and buyer’s assortment analysis
  + Utilize sales performance and inventory requirements by product to assist in purchasing, space requirements and profitability of the category
  + Analyze holding power of product, sales, demand, growth potential, etc… to determine how much space is required for each product
  + In determining the availability of an item within a given store, the client should utilize either the store’s first receipt date or the item’s first scan date
  + Using the store’s first receipt date of the item will give greater accuracy since the first scan date could skew the actual availability of the item on the store shelf
* **Process Recommendations**

As the client continues to grow, it will become increasingly difficult to manage the product assortment and capacity requirements in a growing number of retail sites. Business functions and processes must be clearly defined in order to standardize the category and space management processes. The client should consider identifying vendor category captains to help design clear category objectives and provide insight on consumer behaviour, latest trends, and competitor sales.

Planograms should be created for each unique combination of fixture/assortment configuration. This will provide a true capacity view at each store’s fixture/SKU relationship, providing the needed insight for the Buying Office to procure the correct quantities to support the stores. Define clear communication plans from headquarters to store managers. The better the store understands the category objectives, strategies and tactics, the more effective they can be in execution at store level.

Assign performance measurement goals that are clearly defined by category. Ensure that all those responsible for space allocation, buying, space management, etc. are measured utilizing these same measurement goals.

Develop a Merchandising Calendar with accountability for stakeholder on their actionable items. Visual Merchandising will take ownership on maintaining the calendar. Some of the key actionable items are listed in order below:

* + Performance review will be provided at several levels depending on the user requirements
* Weekly, the planogram-product performance records should be loaded with the weekly, monthly, yearly, aggregated information regarding how this product performed for the stores to which the planogram is assigned
* This level of data allows for performance analysis across planograms at various objects
* A product can be associated to many planograms; likewise, a planogram can be associated to many floor plans and a floorplan can be associated to many stores
* The goal is to update a product’s performance information with the sales information for the stores to which the planogram was assigned
* Additionally, the client wants to be able to analyze the planogram to ensure enough space for each individual item according to the average demand of the item in the stores
* The application must provide average information for the stores associated with the planogram to provide meaningful calculations and space Process Recommendations
* The performance review metrics will need to be confirmed but some common standards are:
* Product performance (sales/profit/volume) per linear foot
* Product performance (sales / profit / volume) per square foot
* Product performance (sales / profit / volume) per cubic foot
* Product comparative performance (sales / profit / volume) vs. other items
* Planogram performance (sales / profit / volume) per linear foot
* Planogram performance (sales / profit / volume) per square foot
* Planogram performance (sales / profit / volume) per cubic foot
* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues/Issues** | **Proposals** |
| Currently the client does not rely heavily on their vendor partners who have greater visibility to the marketplace, competitor information and consumer buying habits. The client’s merchandising process does not have clear visibility to how a consumer shops a given category. | The client should consider identifying vendor category captains to help design clear category objectives and provide insight on consumer behaviour, latest trends and competitor sales. |
| The individual variations between planograms, assortments, and stores are not considered in planogramming process. This causes planograms to be created that do not address the real situation in the store and potentially leads to inventory issues and revenue losses. | Planograms should be created for each unique combination of fixture/assortment configuration. |
| There is basically only one assortment allocated to all stores. The retail stores hold products in their assortment despite lacking sales or movement for these products. This leads to oversized inventory and decreases ROI. Additionally, the broader assortment causes more work and increases logistic costs. |
| The Inventory calculations do not consider planogram to store specifics or space constraints metrics. Therefore, the allocated minimum presentation values for replenishment could cause either empty shelves or overfilled backrooms. |
| No Category Management Calendar. | Create a merchandising calendar to manage minor /major reviews including Line Reviews for all categories. |
| There are no clearly defined financial targets by category. | Develop standardized category scorecards. |
| New products sometimes reach stores without being planogrammed. | Clearly define new product introduction processes and maintain POG for minors. |
| The communication data flow is inconsistent within the buyer group to visual merchandising regarding new products. | Clearly define new product introduction processes. |

# Data Inputs (SAMPLE ONLY make project specific)

* **Current State**

On a demand basis the visual merchandising group can extract product and attribute information including performance level data from its system. The data is pulled using an active process, and the user selects a group of products and their attributes by filtering the products for example by class. This data is then being exported to a data table using ODBC connections using System dsn. The user can now access the data using the Product Library functionalities within Space Planning. To keep the data table manageable, data added more than 30 days before is being purged and not accessible anymore by the users. Then the timeline and quantity of stores for the performance pull is determined by the user. The standard pull would be for 52 weeks all stores. The key product attributes that must be entered manually include:

* + Dimension – height, width, and depth
  + Package Style
  + Package orientation
  + Peg Hole dimensions

Product attributes entered manually, such as dimensions, may change without requiring a new product to be setup.

* **Common Practices**

Planograms consist of products and fixtures, both of which can benefit from data updates from legacy systems to reduce/eliminate manual user intervention. In addition, product performance updates can be established to enable planogram analysis. Product information should be loaded to IKB at the unique SKU level to allow for merchandising and analysis of SKU level data.

* + Product data will include necessary information to form the hierarchy within IKB. Product data is provided through a Master product data feed from the host system
  + Standardized method of capturing and validating new product information, such as dimensions, product categorization, and imaging
  + Provide input data on sales performance, normalized properly. Standard time series are for the latest 13 weeks, latest 26 weeks and latest 52 weeks. Include primary metrics on margin rate and margin dollars. Normalization for average weekly numbers

* **Process Recommendations**

As the client continues to grow, it will become increasingly difficult to manage the product assortment and capacity requirements in a growing number of retail stores. Business functions and processes must be clearly defined in order to standardize the category and space management processes.

The client should consider identifying vendor category captains to help design clear category objectives and provide insight on consumer behaviour, latest trends, and competitor sales.

Planograms should be created for each unique combination of fixture/assortment configuration. This will provide a true capacity view at each store’s fixture / SKU relationship, providing the needed insight for the Inventory management team to procure the correct quantities to support the stores.

Define clear communication plans from headquarters to store managers. The better the store understands the category objectives, strategies and tactics, the more effective they can be in execution at store level. Assign performance measurement goals that are clearly defined by category. Ensure that all those responsible for space allocation, buying, space management, etc. are measured utilizing these same measurement goals.

Develop a Merchandising Calendar with accountability for stakeholder on their actionable items. Visual Merchandising will take ownership on maintaining the calendar. Some of the key actionable items are listed in order below:

* + Vendor Meetings
  + Product assortment provided to VM and Analyst
  + Products built in the product library
  + Sample requests: for dimensions and images
  + Strategy meeting with all stakeholder in the process
  + POG creation
  + Visual and fixtures orders placed
  + POG review
  + POG ready for approval
  + POG approved
  + DC release products to stores
  + Planogram goes Live on the Web publisher
  + Fixtures, sign and visual arrive in stores
  + Product arrives in stores
  + POG set in store
  + Establish merchandising rules for the construction of planograms. Some rules are:
* No squeeze on shelves
* Overhangs are not allowed except 1” max overhang on front of shelf
* Finger space for products on side and top
* Case pack of 1.5 minimum
* Days of supply equal to 14
* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| Performance data is being added to the Space Planning application; however not all the data is being utilized. | With the standardization of the performance data feeds the analytical team will have the required timeframes. The client will provide the ability to run specific category timeframes. |
| Product data is not in sync with data in the client’s system and can be 30 days old. | With the implementation of CKB gap will be closed. |
| Product level attributes must be changes in each file. This is a very manual time-consuming process. | With the implementation of CKB gap will be closed. |

# Data Outputs (SAMPLE ONLY make project specific)

* **Current State**

Planogram data used to generate shelf tags is extracted from space planning files, through an ODBC connection extract and then passed to their system. Unit dimensions are also extracted for the department’s planograms and uploaded. This process provides the dimensions for the start of a new planogram. However, this extract only provides the unit dimensions. Trays and display dimensions are lost, and the user must manually reference the previous planogram to load the information.

* **Common Practices**

Leveraging the relationships and capabilities of an application to store and retrieve pertinent data within the environment reduces the necessity to re-enter data in a multitude of places and reduces or eliminates the possibility of errors. Store / product specific space metrics are available within CKB and based on the business need, this information can be extracted from CKB to various host systems to support further business analysis. Additionally, users who do not have access to the BY tools or database will have the space information available in an environment they are familiar using and will have the benefit of performing space/sales analysis. Other common business processes utilizing the item level data available in CKB include:

* + Product positional information within a planogram
  + Product authorizations by store for order management
  + Planogram net changes for resets
  + Inventory optimization at the shelf level
  + Analytical foundation for space-related metrics
  + Store planogram communications will be achieved using CKB Web publisher
  + Content generated for web distribution include PDF files containing a wide range of data output options, tables, charts, highlights, etc.
  + Distribution of planogram data to the store locations should include a schematic of the planogram set including a set detail report instructing the store personal how to complete the set
  + Product images may also be included giving the store personnel a precise view of the planogram
* **Process Recommendations**

Daily extracts from CKB should also be developed to support replenishment capacity and shelf tag printing within the stores. Additionally, with the association of product / planogram/ aisle / store, the client will be able to print shelf tags in planogram / shelf / product position at store without the manual process utilized today with the completion of a planogram

* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| Data extract for shelf tags is a manual process. | Retain and upgrade current label printing utilities by customize ASP pages of Web Publisher to make PDF created by label utility visible to Web users from its current location. Possible manual trigger of location ID based on “Live” Date of POG. |
| The dimension storage in the client’s system only holds unit attributes. If products are merchandising in any other style other then units, the dimension type is lost and a manual reference is required to re-capture. | Implementation of CKB - all space level product attributes will be stored within CKB. |

# Charting (SAMPLE ONLY make project specific)

* **Current State**

Charting is currently not being applied in the business process for any departments.

* **Common Practices**

Charts that support the space planning process allow the user to view or print a graph of meaningful data such that it improves the efficiency of the process and allows them to rapidly make adjustments. External dissemination charts are for users that do not have access to the system yet have a specific requirement to receive data pertinent to their responsibilities.

* **Process Recommendations**

Create charts that can be used across all divisions maintaining standards so that a recipient can interpret the data. All standard charts should be centrally managed while allowing users flexibility to copy and change them for Ad–hoc variations.

* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| The lack of chart use within the space planning application makes it difficult for the users to make decisions regarding visual space allocations. Such as Sales to Space by Manufacture / category / class. | Identify opportunities where charting can improve current business processes or functions. |

# Highlighting (SAMPLE ONLY make project specific)

* **Current State**

The use of the highlight feature is used to verify some of the merchandising rules within each department. Visual Merchandising uses the highlight feature to verify brand blocking when applicable. Highlighting is also used for UPC duplication to insure an item is not on multi fixtures of a planogram, unless striping is the merchandising design

* **Common Practices**

Since users tend to be predominantly visual, highlighting within planograms is one of the single biggest labor-saving functions available. Color representation of different performance metrics in the context of the merchandised planogram will allow the user to concentrate on activities that are beneficial to the category instead of deciphering information on a report and transposing the actions to the planogram. There are two main forms of highlighting usage:

* + 1. Support for the space planning process
    2. External information dissemination
  + Supporting the space planning process provides the user with a visual reference while working on the planogram set itself
  + It is best used for identifying a single attribute within the planogram that has varied from a tolerance threshold
  + External users can view the highlighted layout to provide a key reference for the planogram. This can reference multiple data attributes but, generally, is easily interpreted without supporting documentation (e.g. sales data or profitability numbers)
  + Incorporating reports within Space Planning layouts will allow for a standard overall picture in planogram information distribution including the generation of PDF files for use within a web environment
  + Use layout files printed with Highlight feature in Space planning to identify various business information / opportunities / issues for a specific planogram. These include:
* Discontinued products
* Profitability analysis
* Movement
* Space to Sales/Profit/Movement (based on category goals)
* Combined performance index
* **Process Recommendations**

Utilize the highlighting models to support both the space planning process and the identification of certain key focus points within the planogram. Specific process support:

* + Highlight product positions based on product status and assortment status to identify new/changed items
  + Highlight product positions based on various attributes to ensure proper visual blocking (i.e. Manufacturer, Vendor, brand, price point)
  + Highlight based on price ensuring a proper spectrum across average price offering
  + Highlight to show differences (additions/deletions) from one planogram to the next
  + Highlight to reveal position errors such as a pegged item merchandised on an open shelf
  + Highlight to show Top/bottom sellers based on profit, units and sales

External users:

* + Highlight key product presentation areas (e.g. New items, SKU blocking, capacity shortages, etc)
  + Highlight based on Department, Class, sales, capacity, etc.
* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| The limited use of highlighting feature makes it difficult for the users to make decisions regarding visual space usage and performance metrics. | Identify opportunities, see above, where highlighting can improve current business processes or functions. |

# Approvals (SAMPLE ONLY make project specific)

* **Current State**

During the category team meeting(s), the planograms are reviewed on the shelf in the planogram room with the buyers and Divisional Merchandising Manager and POG Analyst. A Buyer’s signed version of the planogram and a POG Analyst's signed version is archived verifying approval

* **Common Practices**

Approvals should take the form of one decision point and sign-off with each of the levels involved for input so as to avoid multiple re-work efforts and conflicting requirements. Additionally, the workflow of approvals and sign-offs is best managed through the use of status fields on the planogram record to be able to keep a time/flow perspective of the planogram/floorplan development and release

* **Process Recommendations**

Create process to manage planogram change approvals and feedback loop to ensure that updates are completed. This process will need to support proper timelines within the planogram management cycle to ensure timely distribution

* + Validate and get approval / sign off from analyst on number of facings and verification of minimum presentation and from the buyer for adjacencies and product position
  + Allow the buyers the ability to electronically view planograms awaiting approval though the use of Space Planning Viewer
  + This will allow a buyer to open, in read only mode, planograms and execute required reports developed to aid in the approval process
  + Another option would be for the buyer to access planograms in a PDF form through an email from Visual Merchandising
  + All reports would need to be incorporated into the layout design since the file is .PDF
  + Planograms should stay in a “WIP” status until approval obtained by the buyer
  + Once approved, planograms will be moved to a Pending status with an active date
  + On this date, the versioning process will move the planogram to a “Live” status making it available for distribution
* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| Approvals are still taking place in front of a physical set in the POG room. Creating a very manual process for the visual merchandising team. | Allow buyers to review electronically by Space Planning viewer or by projecting the POG on a wall in real size for a walk through process. |

# Standards (SAMPLE ONLY make project specific)

* **Current State**

Once at their folder location, stores have access to planograms that are associated with their store. Stores have a few weeks to reset the section. Time allocation for resets at store level, is based on the complexity of the planogram.

* **Common Practices**

Regular planogram distribution is a critical component to managing merchandising within the stores. As new items are introduced into categories and new planograms are developed, all stores should be updated with new planogram information so they can act upon it. Availability and ease of printing and accessing new or changed planograms is important. To facilitate the distribution of the planogram data, two methods are employed: printed material or electronic distribution (via web-pages, PDF files, etc). Electronic distribution via Web Publishing facilitates and enables the store to access the proper planogram and implement it. Paper printing costs and mailing costs are reduced utilizing this method as well

* **Process Recommendations**

With the implementation of the CKB Web Publisher application, store and corporate users will have immediate access to ”Live” planogram information. Providing store users immediate visibility to proper placement of new products and planogram changes. In addition an audit process verifying compliance to resets needs to be developed so planogram integrity will be maintained. A completion by store check point will be established with the Web Publication application implementation. Via the communication tool within Web the stores will check when a planogram has been reset. This will provide a Retail Operations the insight on when the stores have completed the resets. The notes section will establish a communication to corporate on issues or concerns regarding the planogram changes Once the stores reply the CKB administrator can run a report pulling in the notes section providing merchandising insights on store concern for quick resolve.

* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| Planograms are not scheduled by a reset calendar. Stores must reference email or store communication for communication of new POGs. | Develop a Merchandising Calendar providing the stores a schedule as when the planograms will be published to the stores. |
| No formal audit is performed to ensure stores comply on Planogram resets. District Managers, the client, Buyers, Merchandising Managers, and VP of Store Merchandising may all walk stores separately for different reasons and they evaluate whether POG's are set | Store should report back via Web Publisher when a POG reset has been completed. |

# Printed (SAMPLE ONLY make project specific)

* **Current State**

The client uses hardcopy for the Buying Office archives and approval process. Planograms are printed for new store openings because stores may not be electronically connected with the client’s headquarters during the construction phase. Printed planograms are provided to the merchandisers for new store set up.

* **Common Practices**

Regular output is limited to key information only and the remainder is accessible vie electronic means. Layout files created as standards include:

* + Planogram picture
  + Shelf details
  + Position reports
  + Performance analysis – limited to store specific planograms where data is relevant to the specific store
* **Process Recommendations**

The optimization of printed output requires the integration of the various pages into one layout such that the user minimizes the amount of rework and repetitive entry. Printed copies should be utilized to gain a signature for approval of new POG or reviewing a POG with the key business stakeholders. Printed material content is managed via print layouts within Space Planning and the inherent flexibility will need to be leveraged to maximize the productivity of the end users and the application. To support this, it will be necessary to create layout files that meet the reporting requirements for each fixture type or business area.

* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| New store merchandising teams use a paper copy provided by the corporate visual merchandising team, potential for team to lose or misplace a version by not having the ability to the intranet’s soft copy. | Use Web Publishing to provide new stores an electronic alternative to the current process of printed versions mailed or delivered to stores. |

# Web Publisher (SAMPLE ONLY make project specific)

* **Current State**

Charting is currently not being applied in the business process for any departments.

* + Planogram picture
  + Shelf details
  + Make a PDF version
  + Save PDF to shared drive
  + Open the “POG Sender” application
  + Choose the PDF version of the POG publishing
  + Choose the stores associated, one at a time
  + Run the job
  + Download takes place during the night
* **Common Practices**

CKB Web Publisher is implemented causing live planograms to be published electronically to the stores. There are several advantages to this approach:

* + Paperless at the corporate level with multiple access rights (for all corporate areas, management, buyers, store operations, etc…) to view and drill into specifics on each planogram
  + Time efficient – changes are published and in the hands of the store long before a hard copy can arrive
  + Multiple formats can be applied to the data published down to the planogram hierarchy node level of your choosing
  + Most current version is always available electronically after a publishing event
  + Audit capability built into Web Publisher allows for compliance checking
  + Feedback through published site provides means of communicating with corporate indicating planogram has been set along with any comments or notes from the set
* **Process Recommendations**

Implement CKB Web Publisher. Establish versioning methodology that coincides with “Live” versions being published in a timely fashion to the stores. Establish printing procedures for stores that minimizes paper waste yet provides the most flexible and accurate way to implement a planogram in the store. Establish content and format for all planograms by division and department. Create layout files for as much of the content as is possible including charts, tables, highlights and planogram views.

* **Assumptions & Issues**

|  |  |
| --- | --- |
| **Assumptions & Issues** | **Proposals** |
| New store merchandising teams use a paper copy provided by the corporate visual merchandising team, potential for team to lose or misplace a version by not having the ability to the intranet’s soft copy. | Use Web Publishing to provide new stores an electronic alternative to the current process of printed versions mailed or delivered to stores. |

# User Security and Access Requirements (SAMPLE ONLY make project specific)

* Corporate level users should be established with their respective corporate standard user id. Web access rules should be established to restrict stores to only their respective planograms. Likewise, web access rules can be established to restrict regional managers to only their respective stores.

# Resources and Roles (Optional, if required)

**[Detail the required activities by role, who will perform them, and the communication plan for issues and results. Modify table and table headings as necessary for the project]**

## Resource Table

|  |  |  |  |
| --- | --- | --- | --- |
| **Resource** | **Activity** | **Role** | **Reports to** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Project Risks (Optional, if required)

**[Detail any known risks to functional/solution design of this project. This can be a narrative, bulleted list or in a table format. Add, update, and track these risks in the Risk Register/Log]**

|  |  |  |  |
| --- | --- | --- | --- |
| **Table Format** | **Table Heading** | **Table Heading** | **Table Heading** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Supporting Reference Documents

**[List project documents used and referenced to build the Functional/Solution Design Document (e.g. Technical Design Document, Engagement Document) – list full document name and version number]**

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Document Version #** | **Document Date** |
|  |  |  |
|  |  |  |
|  |  |  |

# Traceability Matrix (Optional, if required)

**[Provide the traceability matrix between business requirements and Functionality for modification/enhancements]**

|  |  |  |
| --- | --- | --- |
| **Business Requirements ID** | **Functionality Design ID** | **Remarks** |
|  |  |  |
|  |  |  |
|  |  |  |

# Appendix A: Approval Signatures

**<Provide verbal content on what is being signed off>**

## Project Sponsor Sign-off

|  |  |
| --- | --- |
|  | |
| Client Sponsor signature Date: | **(This could be either the Executive Sponsor or Client Partner)**  Blue Yonder Sponsor signature Date: |
| Client Project Sponsor (Print Name) | Project Blue Yonder Sponsor (Print Name) |

### 

## Project Manager Signoff

|  |  |  |
| --- | --- | --- |
|  | | |
| Client PM signature Date: | | Blue Yonder PM signature Date: |
| Client Project Sponsor (Print Name) | Project Blue Yonder Sponsor (Print Name) | |

# Appendix B: Glossary of Definitions, Acronyms, and Abbreviations (SAMPLE ONLY make project specific)

* **Project:** Collection of planograms, fixtures, and products and /or floor plans, fixtures, and planograms that are associated to each other to accomplish tasks
* **Planogram**: The basic foundation object in Space Planning. This object represents a group of merchandise on a fixture or collection (assembly) of fixture elements
* **Segment**: A vertical division on a planogram backboard. Segments usually are identified at places where notch bars represent the physical divisions on an actual planogram
* **Fixture**: An object that represents a physical structure on a planogram. Most fixtures can contain positions. Sign and obstruction fixtures cannot contain positions
* **Product**: An object that represents merchandise that can be placed on a planogram
* **Position**: The physical representation of a product on a fixture in a planogram
* **Attribute**: A descriptive field for products in the project, such as flavor, brand, or package style
* **Date Effective** (Product, Planogram, and Project): The effective date for the object
* **Date Finished** (Product, Planogram, and Project): The completion date for the object
* **Product Library**: Display data from an external product database. You can use this information to load new products into the active project, or to update existing products in the project with the most current data from the external database
* **Database Product Library**: Provides you with direct access to product data stored in the Category Knowledge Base. You can use this information to load new products into an active project
* **Database Planogram Library**: Provides you with direct access to planogram data stored in the Category Knowledge Base. You can use this information to load new planograms into an active project