

Medical Equipment Manufacturer Evolves With Rapid Growth

Adaptive Planning Solution

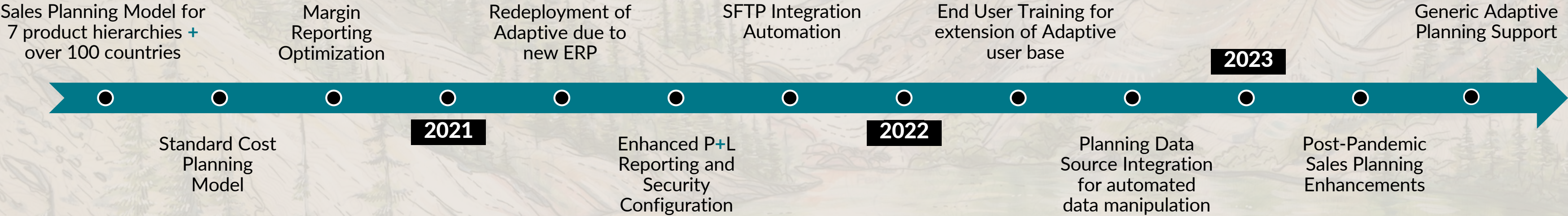
Sales Planning + Margin Planning +
Integration Automation + Redeployment

Optimize client's Adaptive platform for
planning, analytics + growth

Multi-Year Journey + Partnership

- Redesign of foundational model, security, reporting + analytics
- Unique integration solution to handle different requirements for AOP + Forecast processes
- Multi-currency top-down sales planning model

Project Timeline



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OH-NO Moments

- SKU level planning requirements made **planning in Excel unreasonable and difficult**
- **Complex top-down planning process** based on trending actuals and allocating data across different hierarchies and currencies
- Previous sales planning process ineffective and inaccurate due to **effects of COVID** on sales demand + manufacturing restrictions
- Unique system security setup to accommodate **differences in access** for an individual for workforce planning and P&L planning
- **New foundational data model** due to change in ERP from legacy system to Oracle HFM

AH-HA Moments

- Allocation based model allows for SKU level planning based on top-down growth assumption inputs **simplifies planning process**
- Product Hierarchy and Sub-Region-based inputs allow for a **faster + more accurate planning process**
- Configuring security via Access Rules eliminates need for two credentials per user
- SFTP integration allows for **automated data** flow
- Using Adaptive as a Planning Source allows for **faster, more flexible + accurate forecasts**

From our Customers



“We were ready to replace Adaptive before Invisors came in and helped create models and reporting solutions that satisfied our needs for both planning and analytics.”

“Invisors are life savers. As the business continues to grow and requirements continue to change, Invisors always has a solution.”

