

SQS Forecasting and Maintenance

September 21, 2016



- Overview of functionality—what you've seen and what you haven't!
- How Sutphen uses this data
- Making the data more meaningful (cleanup)
- Next steps...

Overview – What You’ve Seen

Quotes Orders Customers My Items

Quote SQB004229-1

Location: * Sutphen Corporation

Customer: * Sutphen Corporation

Quote Name: SPH-100 - DEALER MEETING TEST

Version: 1

Print Place Order More...

Header Pricing **Items** Comments

Item Selection

Item: Production Planning & Forecasting

Quantity: 1

Probability To Close: 80%

Estimated Close Date: 10/31/2016

On Configuration Label:

Total Price: 1,152,990.67

Qty	UOM	Price	Total
1	EA	1,152,990...	1,152,990...


Line Details Remove


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Overview – What You’ve Seen

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 Print

 Place Order


 More...

Quote SQB004229-1

Location: *

Customer: *

Quote Name:

Version: 

Header

Pricing

Items

Comments

Item Selection


Item:


Description:


Quantity: EA

Price:

Label:

 Configure

 Named Configurations

 Add Write-In Item

Quote Lines

☒ Validate All

☐ Expand All

Total Price: 5,764,953.35

Line	Label	Item	Qty	UOM	Price	Total
<input type="text" value="1"/>	<input type="text"/>	Aerial	<input type="text" value="5"/>	EA	1,152,990...	5,764,953...

Change Options

Copy

More...

Line Details

Remove



Overview – What You Haven’t Seen

Raw Data:

Dealer	OrderNo	Customer	LineNo	Apparatus	CreateDate	
Sutphen Corporation	SQB004229_1	Sutphen Corporation	1	Aerial	9/20/2016	
Quantity	EstimatedCloseDate	ProbabilityToClose	MaintenanceDate	Facility	TruckSeries	AerialDevice
5	10/31/2016	80	9/20/2016	Dublin	CTZ	SPH100

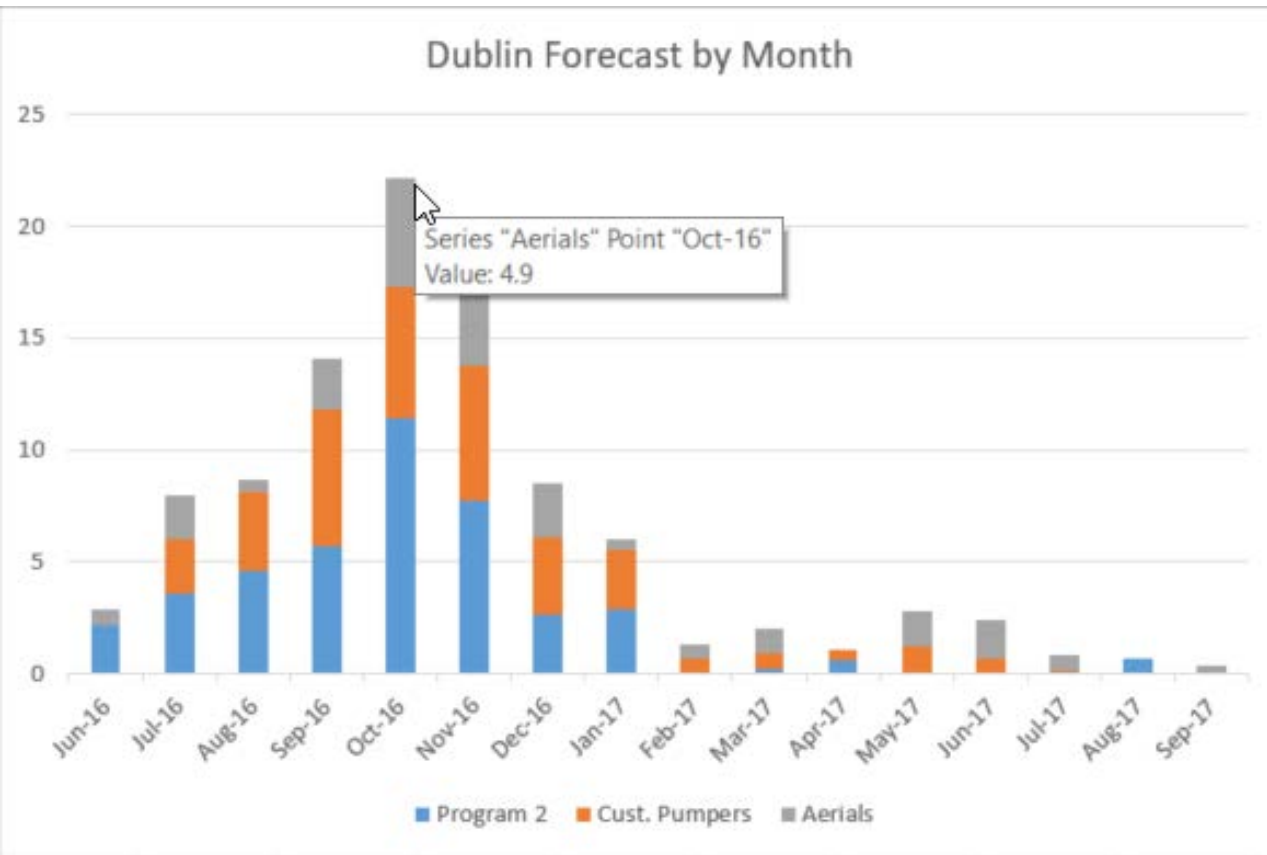
Manipulated Data:

Month	Start Date	End Date		Pumper	Pumper	Pumper	Pumper	Aerial	Tanker	Pumper	Pumper	Aerial
			SpringCHS	SpringTRK	SpringTRK	Dublin	Dublin	Dublin	NY	NY	NY	Hilliard
			CTZ	CSER	PRG1	PRG2	CTZ	CTZ	CTNK	PRG2	CTZ	CTZ
Apr-16	4/20/2016	4/30/2016	0	0	1.8	0.4	0.4	0	0	0	0	0
May-16	5/1/2016	5/31/2016	0.6	0	0	0.5	0.4	0.2	0	0	0.3	1.1
Jun-16	6/1/2016	6/30/2016	0	1	0.9	2.2	0	0.7	0	0	0.1	2.7
Jul-16	7/1/2016	7/31/2016	1.2	0	0.4	3.6	2.4	2	0	0	0	3.8
Aug-16	8/1/2016	8/31/2016	0.5	0.8	2	4.6	3.5	0.6	0	0	2.4	3.7
Sep-16	9/1/2016	9/30/2016	0	1.7	5.3	5.7	6.1	2.3	0	0	3.3	2.8
Oct-16	10/1/2016	10/31/2016	2.3	1.3	3.1	11.4	5.9	8.9	0	0	4.1	5.3
Nov-16	11/1/2016	11/30/2016	1.3	0.1	4.1	7.7	6.1	3.2	0	0	1.7	5.4
Dec-16	12/1/2016	12/31/2016	1.9	0.2	6.6	2.6	3.5	2.4	0.2	0	2.4	2.8
Jan-17	1/1/2017	1/31/2017	0	0.4	4.1	2.9	2.6	0.5	0	0	0.7	0
Feb-17	2/1/2017	2/28/2017	0	0	0.3	0	0.7	0.6	0	0.5	0	0.5
Mar-17	3/1/2017	3/31/2017	0	0.9	0	0.2	0.7	1.1	0	0	0.1	0.3
Apr-17	4/1/2017	4/30/2017	0.2	0	0	0.6	0.5	0	0.2	0	0.2	0
May-17	5/1/2017	5/31/2017	0	0	0	0	1.2	1.6	0	0	0	0.5
Jun-17	6/1/2017	6/30/2017	0.1	0	0.2	0	0.7	1.7	0	0	0	1.9
Jul-17	7/1/2017	7/31/2017	0.1	0	0	0	0.1	0.7	0	0	0.5	0.3
Aug-17	8/1/2017	8/31/2017	0	0	0	0.7	0	0	0	0	0	0
Sep-17	9/1/2017	9/30/2017	0	0	0	0	0	0.4	0	0	0	0

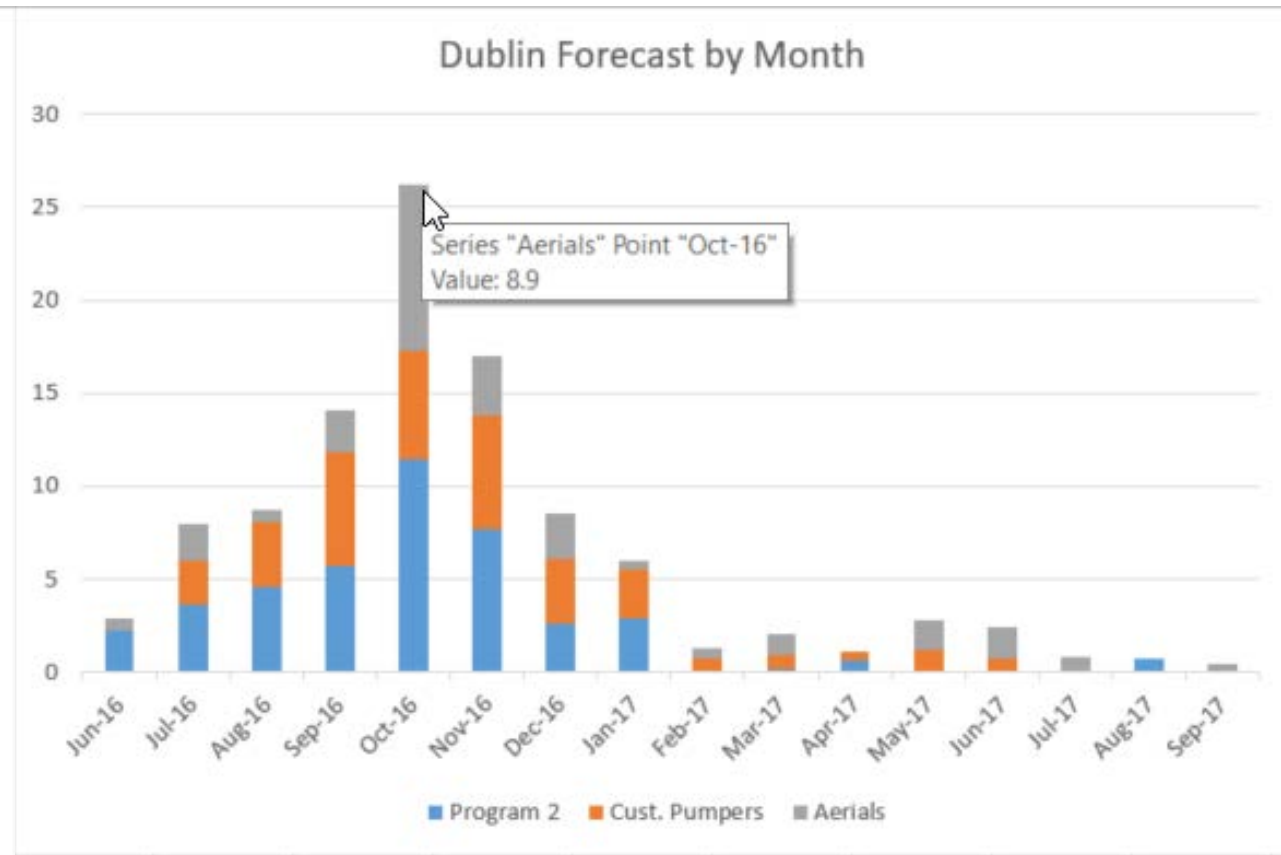
Overview – What You Haven't Seen

Visual Outputs

Before New Quote:



After New Quote:



Planning for production volume increases, decreases, and shifts



Example: Recent shift of pumper products into aerial area in Dublin

- Recognized upcoming surge in pumper activity
- Recognized upcoming decline in aerial activity
- Shifted select pumpers into the aerial area for production
- Result: Program 2 backlogs under 8 months, Customs under 11 months

Planning long-term purchasing needs



Example: Recent pre-purchase of Cummins engines

- Needed breakdown of engine requirements for orders not yet booked
- In this instance, used direct feedback from facilities
- ***Could*** have been extracted from SQS forecasting reports

Tracking sales trends to adjust product design, pricing, and/or marketing

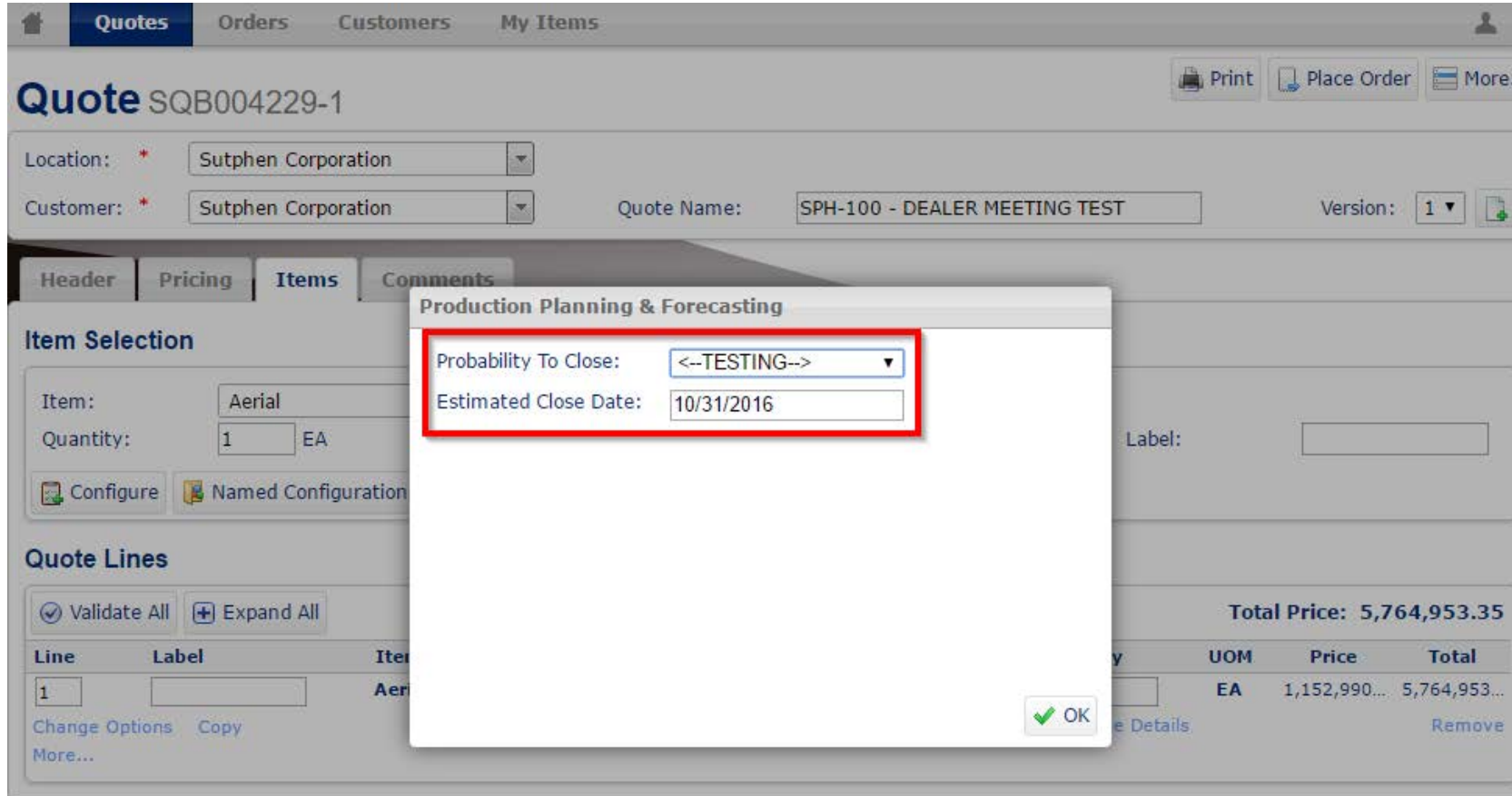


Examples:

- Consistently winning/losing bids on particular products
- Evaluating sales activity of various options and accessories

Making the Data Meaningful

- Be realistic with probabilities and estimated close dates
- Remember that “TESTING” is an option for quotes created for training or system testing purposes

The screenshot shows the 'Quote' form for quote SQB004229-1. The form includes fields for Location (Sutphen Corporation), Customer (Sutphen Corporation), Quote Name (SPH-100 - DEALER MEETING TEST), and Version (1). A modal dialog box titled 'Production Planning & Forecasting' is open, showing 'Probability To Close' set to '<--TESTING-->' and 'Estimated Close Date' set to '10/31/2016'. The dialog box has an 'OK' button with a green checkmark. The background form also shows 'Item Selection' for 'Aerial' and a 'Quote Lines' table with one line item.

Line	Label	Item
1		Aerial

UOM	Price	Total
EA	1,152,990...	5,764,953...

Making the Data Meaningful

- Remember to correctly fill out the “Qty” field on each line

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Quote SQB004229-1

Location: *

Customer: *

Quote Name:

Version:

[Header](#) [Pricing](#) [Items](#) [Comments](#)

Item Selection

Item:

Quantity: EA

Description:

Price:

Label:

[Configure](#) [Named Configurations](#) [Add Write-In Item](#)

Quote Lines

[Validate All](#) [Expand All](#)

Line

Label

Item

Qty

UOM

Price

Total

1

Aerial

5

EA

1,152,990...

5,764,953...

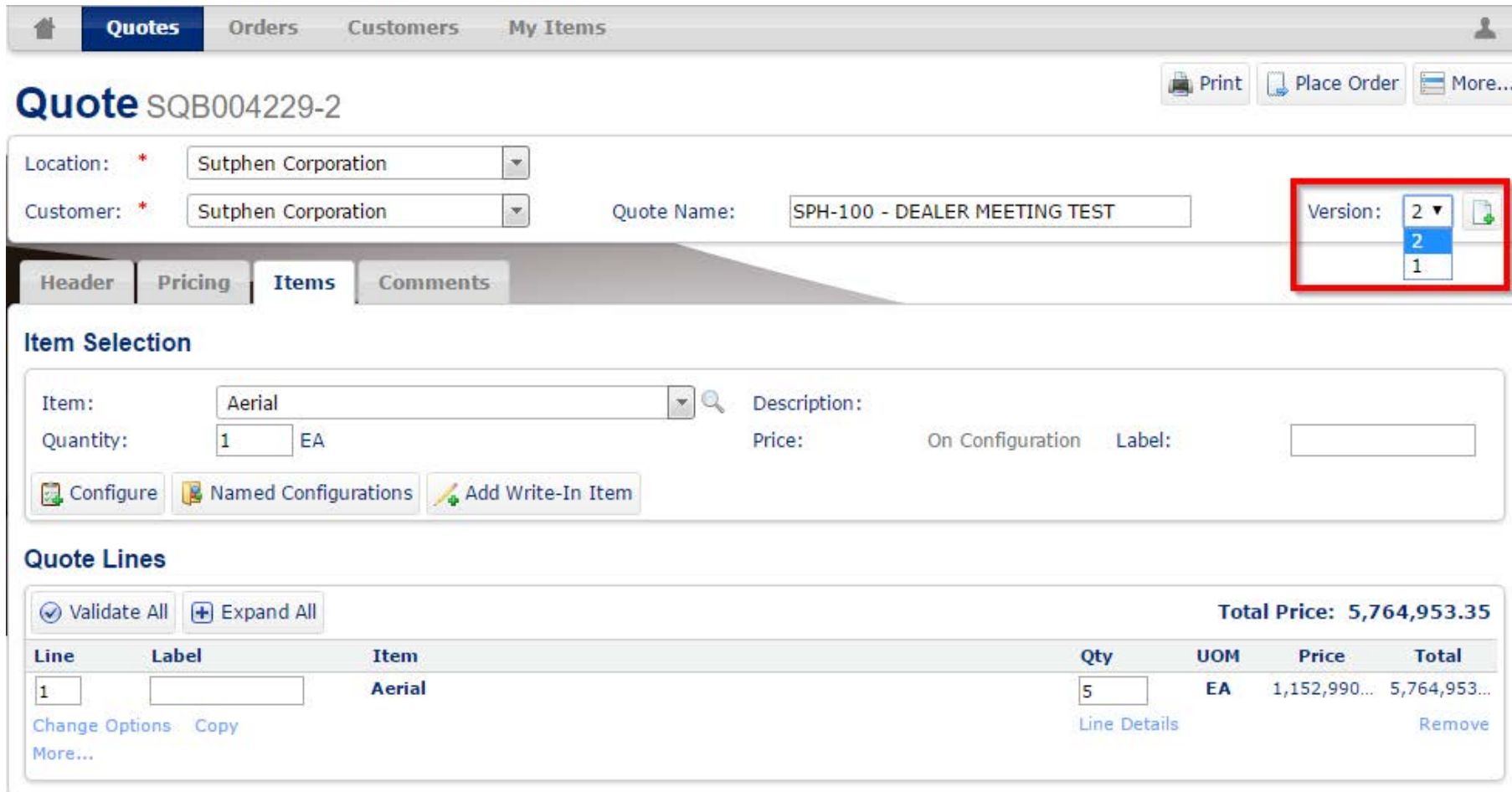
[Change Options](#) [Copy](#)

[Line Details](#) [Remove](#)

Total Price: 5,764,953.35

Making the Data Meaningful

- Use the “Version” functionality for multiple versions of quote
- Avoid starting additional quotes for a single deal



Quote SQB004229-2

Location: * Sutphen Corporation

Customer: * Sutphen Corporation

Quote Name: SPH-100 - DEALER MEETING TEST

Version: 2

Header Pricing Items Comments

Item Selection

Item: Aerial

Quantity: 1 EA

Description: Price: On Configuration Label:

Configure Named Configurations Add Write-In Item

Quote Lines

Validate All Expand All

Total Price: 5,764,953.35

Line	Label	Item	Qty	UOM	Price	Total
1		Aerial	5	EA	1,152,990...	5,764,953...

Change Options Copy Line Details Remove More...

Making the Data Meaningful

- When a deal is lost or abandoned, please change the quote status

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[Print](#) [Place Order](#) [More...](#)

Quote SQB004229-2

Location: *

Customer: *
 Quote Name:
 Version:

Header [Pricing](#) [Items](#) [Comments](#)

Quote Information

P.O. Number:

Quote Status:

Created by: Chesson, Chris 9/20/2016
 Created by: Chesson, Chris 9/20/2016
 Available to: 1/18/2017

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[+ New Quote](#)

Quote Search

	Customer	Name	PO#	Location	ID	Last Modified	Modified on	Status
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	open
	Sutphen Corporation	SPH-100 - DEALER MEET		Sutphen Corporation	SQB004229-2	Chesson, Chris	9/20/2016	Open
	Sutphen Corporation	SPH-100 - DEALER MEET		Sutphen Corporation	SQB004229-1	Chesson, Chris	9/20/2016	Open
	Jason Haulman			Sutphen Corporation	SQB004228-1	Haulman, Jason	9/20/2016	Open
	Brevard County Fire Res	S2 Pumper 2017		South Florida Emergency	SQB003733-1	Lombardo, Guy	9/20/2016	Open
	Rome FD	Rome Tanker dry side		Herb Fire 3 (Bob Jones)	SQB004138-1	Jones, Bob	9/20/2016	Open
	Rome FD	Tanker wetside		Herb Fire 3 (Bob Jones)	SQB004138-2	Jones, Bob	9/20/2016	Open

- Begin to utilize the data more to drive sales, marketing, and product design decisions
 - Begin more deeply analyzing sales activity and conversion ratios on specific products and options
 - Create analytics that compare Sutphen quoting activity against FAMA statistics
- Integrate with the master schedule to create real-time backlog projections up to three months in advance
- Create an output that automatically e-mails to dealers weekly

- Making better use of the data available within SQS can change the way that we do business
- ***Thank you*** for taking the time to keep our forecasting data accurate!
- Please continue to monitor open quotes for accuracy
- If you ever have questions or concerns about the data that you're entering, please don't hesitate to reach out to Chris Chesson or your SAE

