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SQS Forecasting and Maintenance

September 21, 2016

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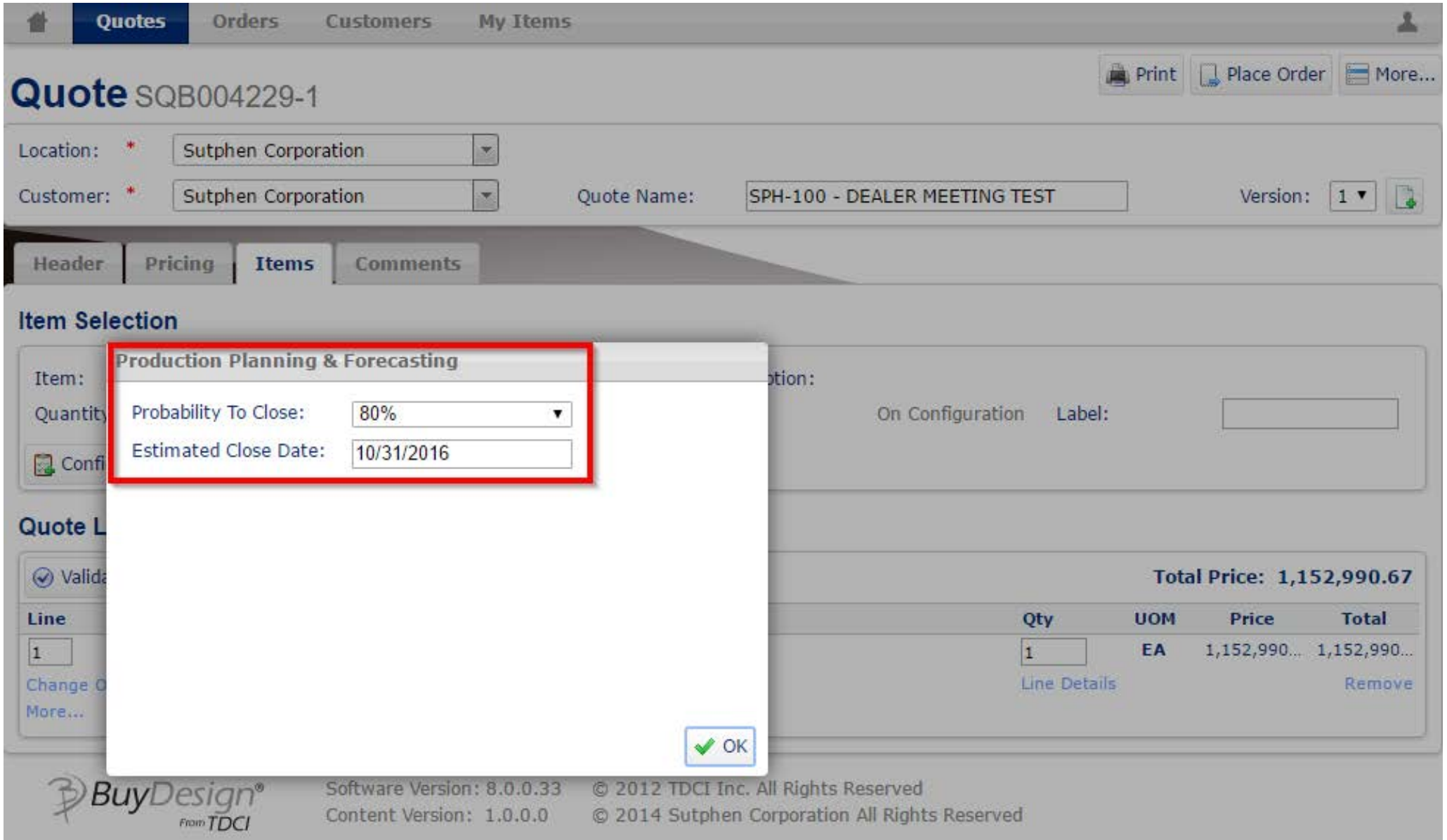
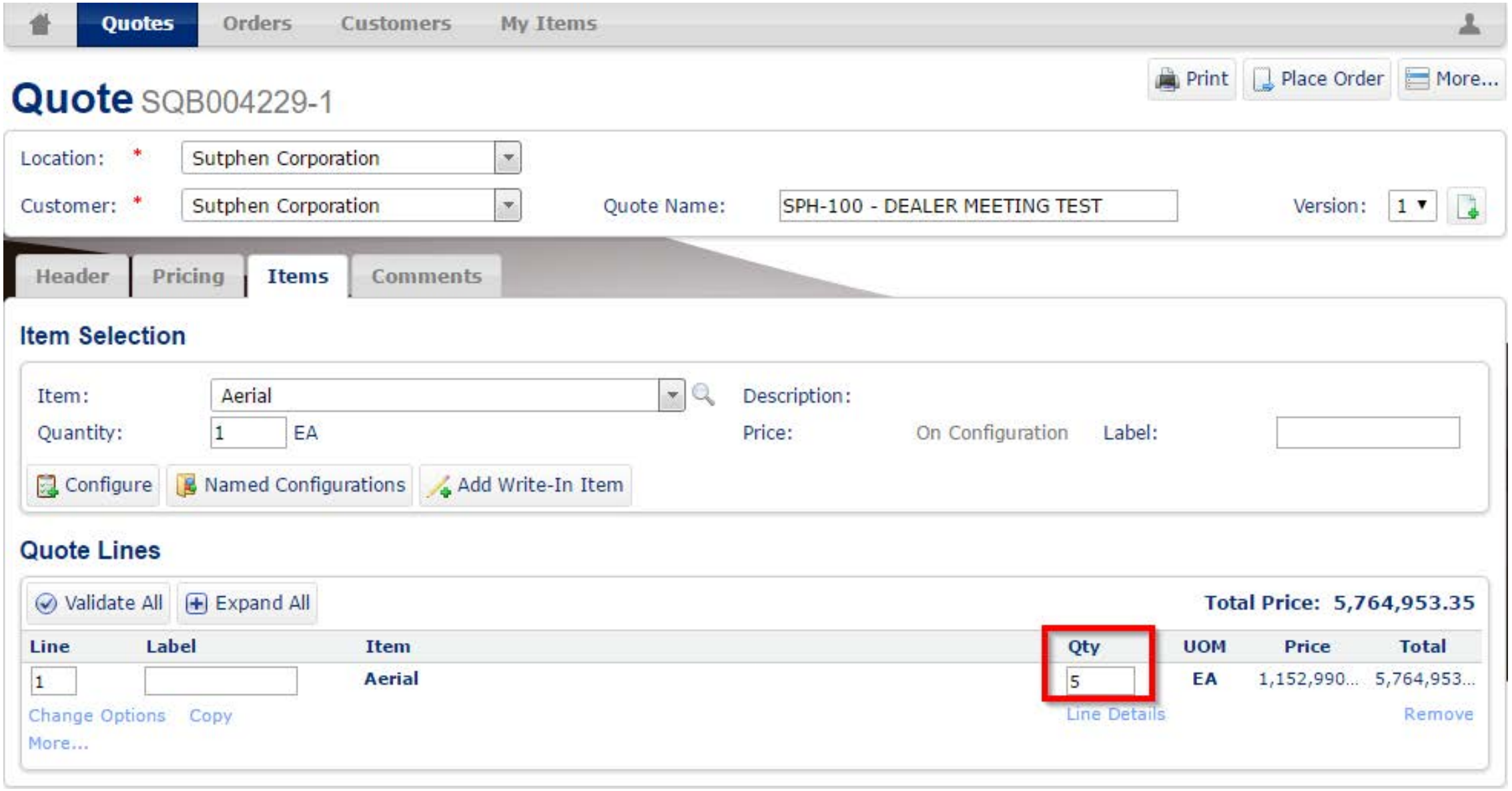
Agenda

- 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



Overview – What You've Seen



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

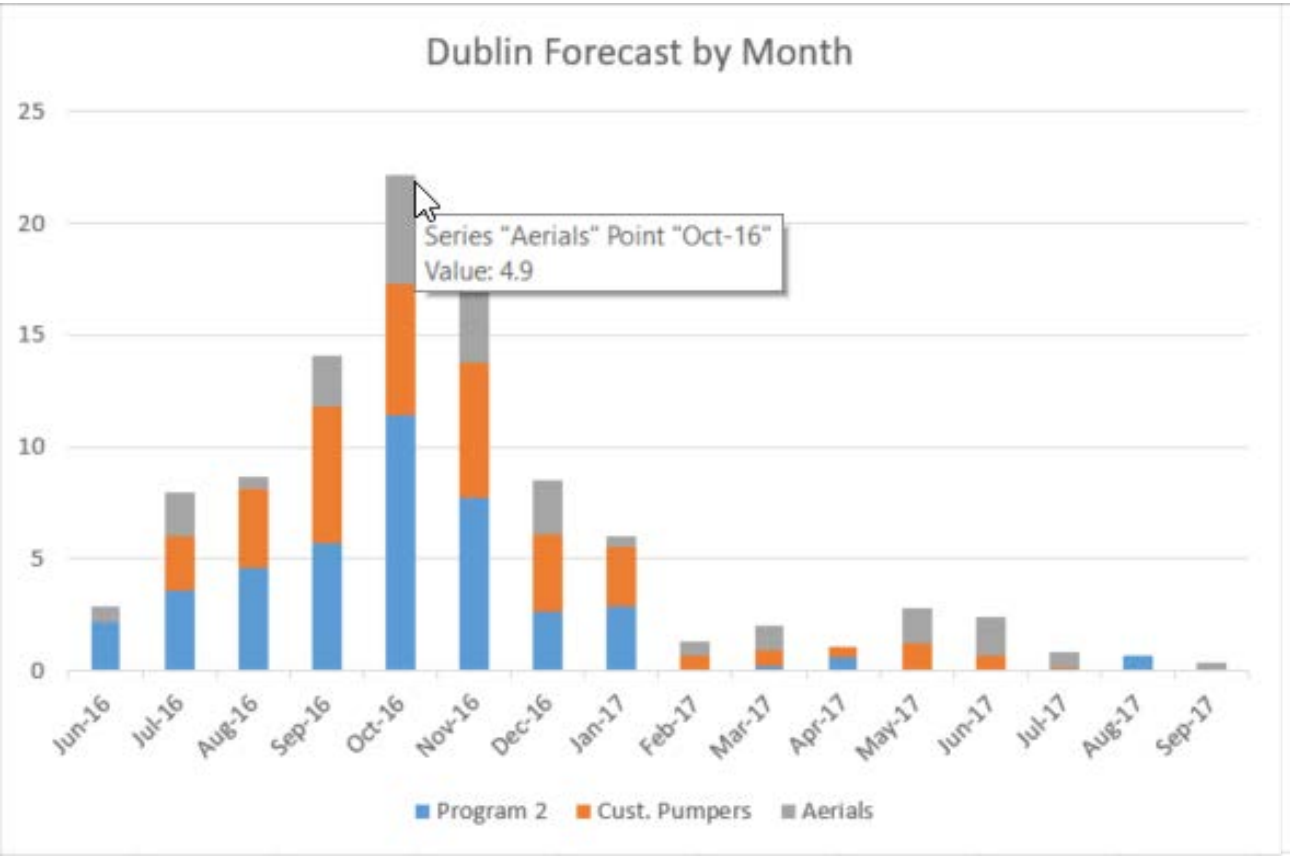
Manipulated Data:

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

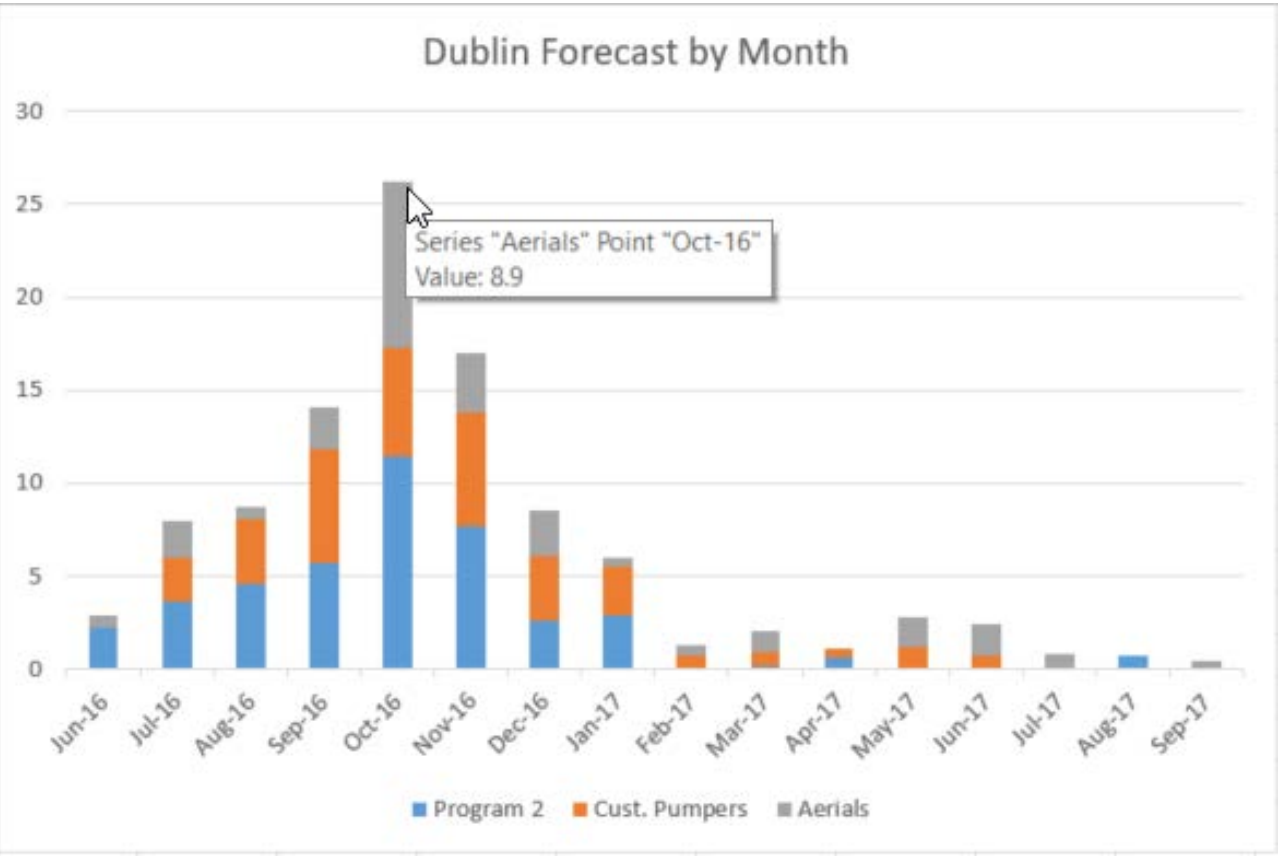
Overview – What You Haven't Seen

Visual Outputs

Before New Quote:



After New Quote:



Using the Data

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

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Using the Data

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

Using the Data

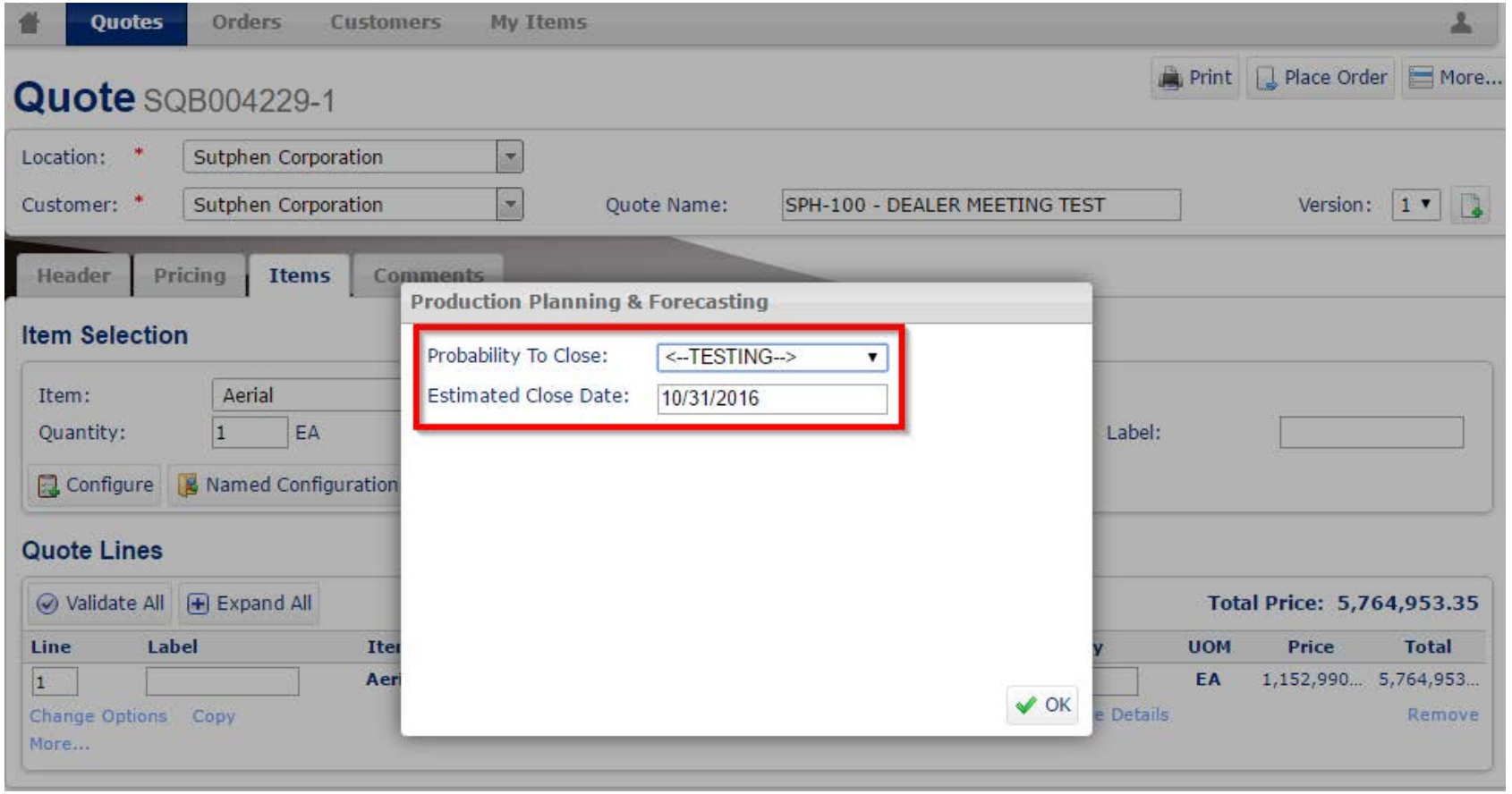
Tracking sales trends to adjust product design, pricing, and/or marketing

Examples:

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

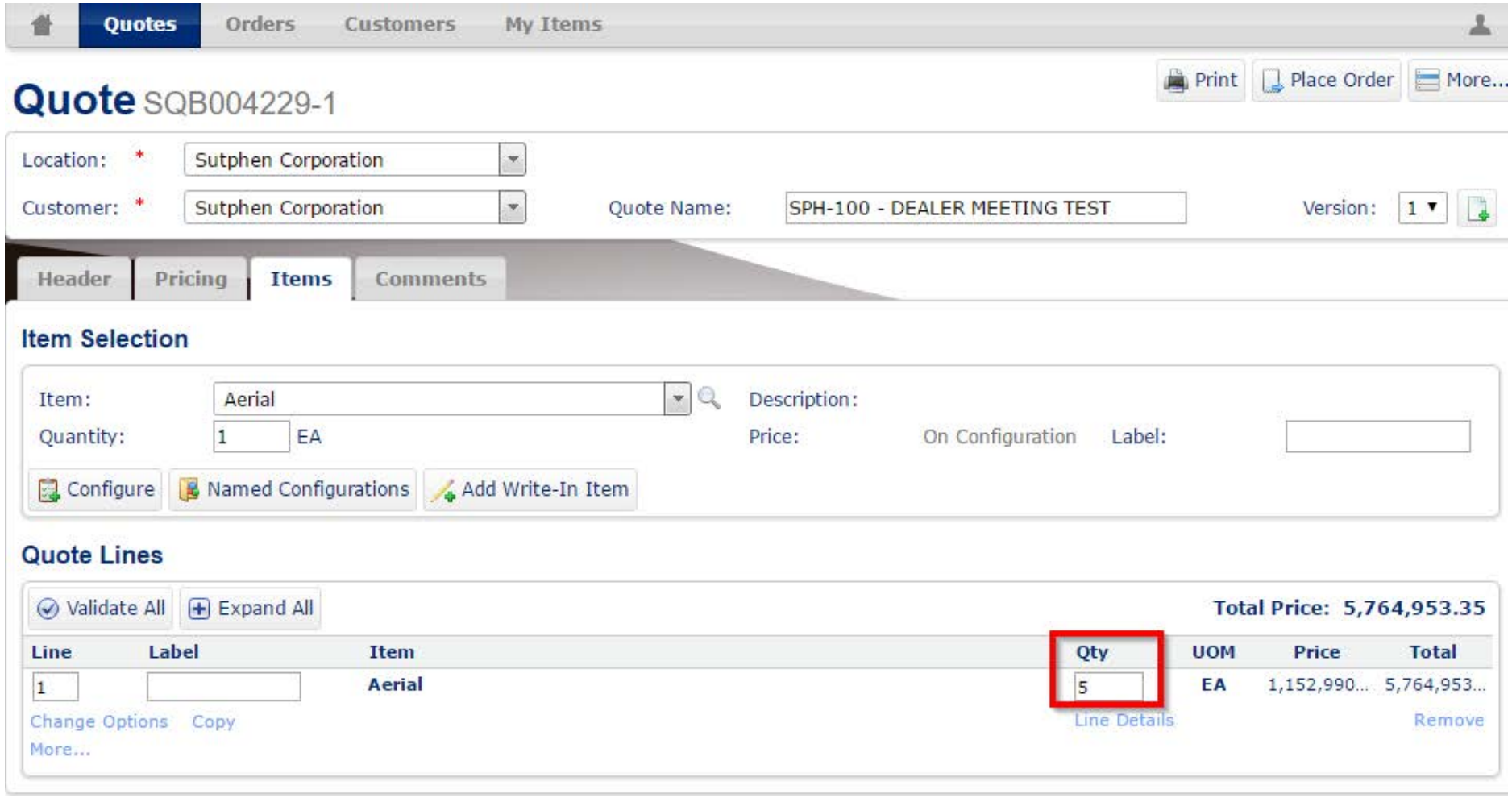
Making the Data Meaningful

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



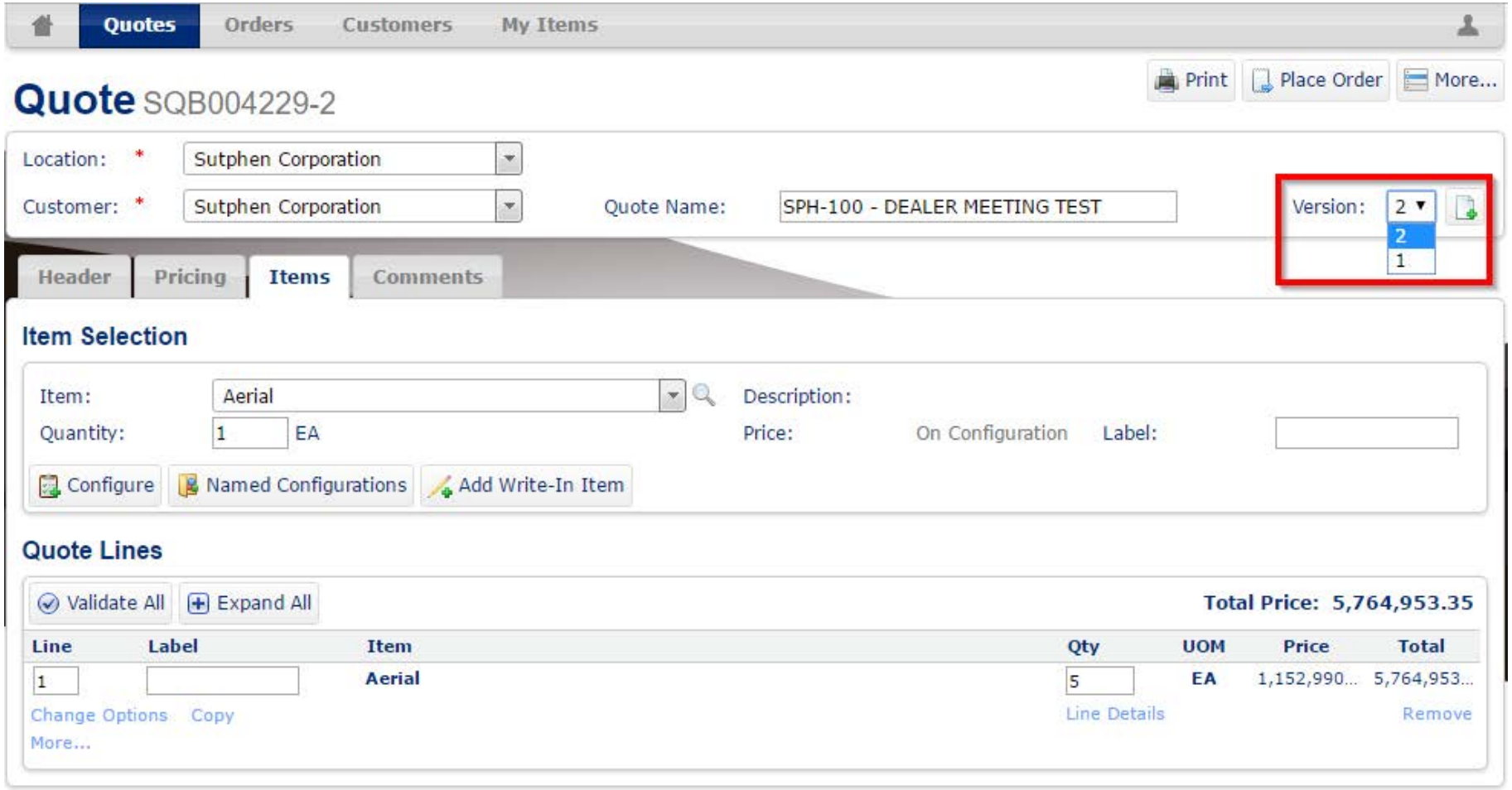
Making the Data Meaningful

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



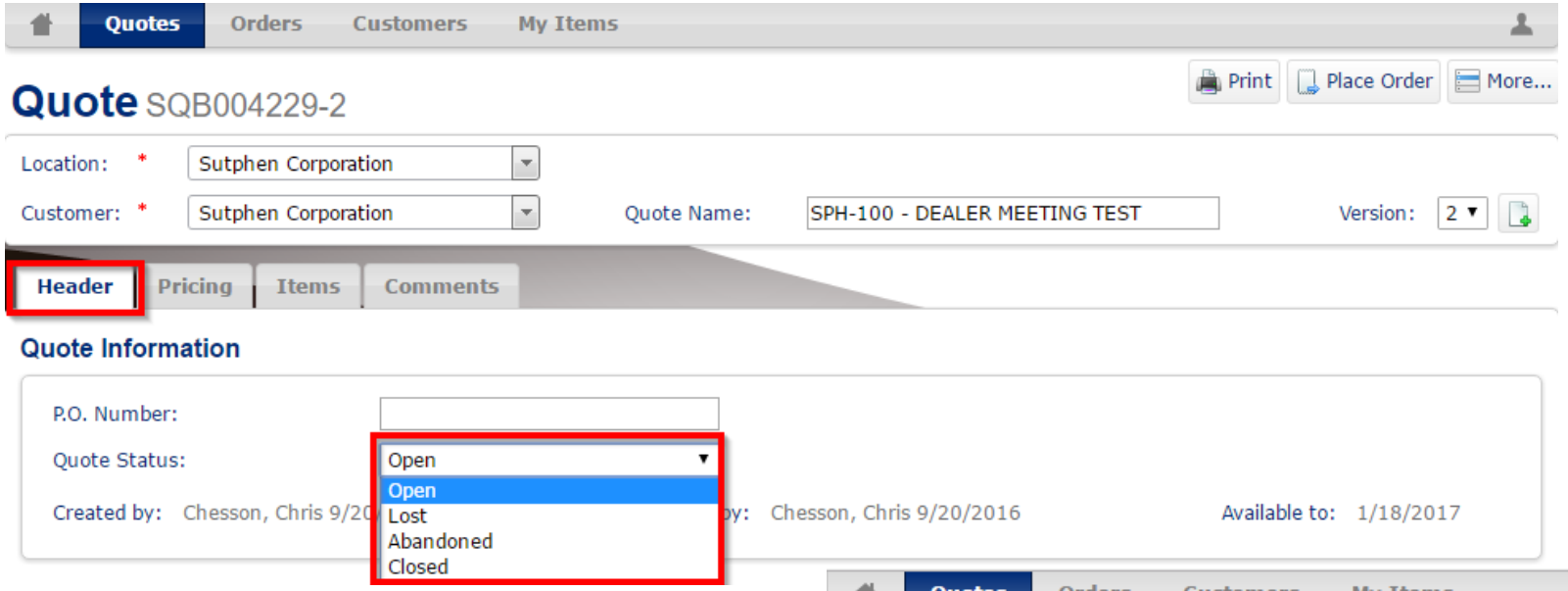
Making the Data Meaningful

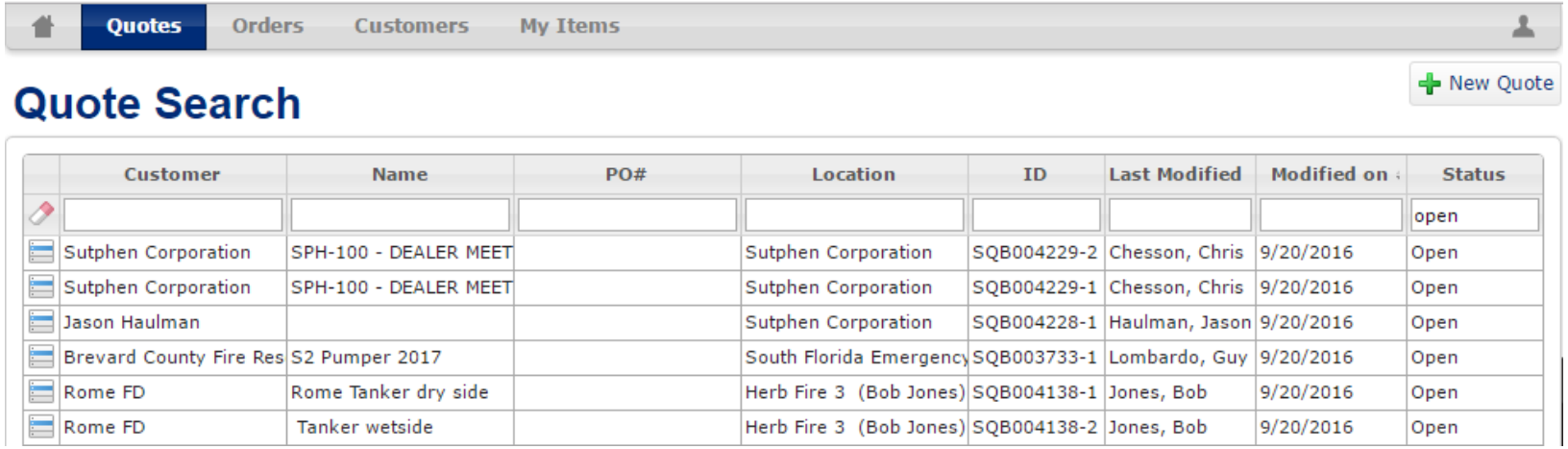
- Use the “Version” functionality for multiple versions of quote
- Avoid starting additional quotes for a single deal



Making the Data Meaningful

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





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Next Steps…

- 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

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Summary

- 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

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Questions?