

# Commercial Planning

## Portfolio Planning

- Use SAP S/4HANA pricing conditions as a base to make changes to planned list prices.
- Plan the expected quantity and revenue impact caused by the list price adjustments.



**SAP**

**Commercial Planning**

 <p><b>Portfolio Planning</b></p> <p>Including: List Price Planning</p>	 <p><b>Sales Planning</b></p> <p>Including: Budget Planning Demand Planning Activity Planning</p>	 <p><b>Marketing Planning</b></p> <p>Including: Budget Planning Demand Planning Campaign Planning</p>
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## Sales Planning

- Use FP&A financial targets as a base for global and regional budgets, for both revenue and sales deductions.
- Plan sales activities that will impact incremental revenue and sales deductions, then analyse the results.
- Adjust total revenue plans and provide commentary for the reasons behind the changes.
- Analyse sales performance at a global, regional and customer level with the provided dashboard.

**SAP Sales Planning - Sales Activity Planning**

**Create Activity**

**Sales Activity - General Information**

Title: US NE Summer Holidays | Activity ID: ACT\_14447966535

Start Date: 2023-07-15 | End Date: 2023-08-15

Tactic: Promotion | Status: Approved

Sales Organization: 1710 - Dom. Sales Org US | Company Code: 1710

Customer: USCU\_LBR (US Lager Cycle 1), USCU\_L05 (US Leg... | Product: M2-PG-26ECR (Enviar Bike), M2-PG-C900 (C900 BL...)

Comment: Promotion of all product lines targeting the summer vacation period. Confirmed with customers.

**Sales Activity - Volume and Spend Planning**

Uplift %: 150

Spend Type: Rebate Percentage | Value (% / %): 10

Buttons: Cancel | Save & Create a New Activity | Save

**SAP Sales Planning - Regional Sales Budget**

**Sales Revenue & Spend Budget Planning**

**INSTRUCTIONS**

- Use the "Table Settings" button to select reference versions to be displayed, as well as the opened currency conversion factor to be applied across versions.
- Make changes to Gross Revenue and Sales Deductions budgets for any dimension combination.
- Click on "Calculate Quantity" to update the resulting budgeted quantities (Gross Revenue divided by List Price, where List Price is the same as the Financial Target version).
- Click "Confirm" to publish your changes, or "Reset" to revert them.

**Gross Revenue** | **Spend** | **Gross Margin**

2023 | 515.68 +3.33 +1.00% | 2023 | 17.63 +0.38 +1.00% | 2023 | 34.88 -0.17 0.00%

**Sales Revenue & Spend Budget Planning**

Buttons: Initialize Regional Budget | Calculate Quantity | Reset | Confirm

Sales Organisation	Customer	Product	Date		Gross Revenue				Sales Deductions				Investment Rate %	
			> 2023		Quantity		Amount @ Budget		Amount @ Budget		Amount @ Budget		Amount @ Budget	
			Unit	Unit	Budget1	Budget2	Budget1	Budget2	Budget1	Budget2	Budget1	Budget2	%	%
▼ Total	> Total Customers	▼ Total Bikes	839,259	832,061	517,343,498.44	515,678,477.67	37,253,857.68	37,630,159.27	7.37	7.30				
		> Cruise	155,957	156,853	119,297,977.07	119,975,975.14	8,863,709.71	8,791,221.93	7.26	7.29				
		> Mountain	104,926	106,612	170,680,812.45	172,695,118.97	12,499,118.32	12,625,372.04	7.35	7.31				
		> Exercise	14,273	14,074	39,932,743.86	39,392,449.48	2,811,044.74	2,839,436.13	7.04	7.21				
		> Racing	35,790	37,301	124,867,214.61	125,598,455.58	9,069,385.18	9,160,995.13	7.26	7.24				
		> Youth	527,314	517,241	58,174,750.45	57,016,896.69	4,210,989.72	4,253,131.03	7.24	7.46				
▼ Europe	> Total Customers	▼ Total Bikes	485,759	472,816	302,955,152.70	302,271,428.94	25,469,975.41	25,721,247.89	8.41	8.51				
		> Cruise	89,465	90,020	70,039,189.89	70,474,378.36	5,912,869.80	5,972,232.12	8.44	8.47				
		> Mountain	61,356	61,014	101,772,897.68	101,205,854.88	8,546,384.15	8,632,691.06	8.40	8.53				
		> Exercise	8,100	8,105	23,205,225.50	23,217,770.44	1,931,928.68	1,951,443.11	8.33	8.40				
		> Racing	21,140	21,414	73,426,258.00	74,376,787.86	6,210,107.90	6,272,856.27	8.46	8.43				
		> Youth	305,899	292,263	34,513,561.63	32,996,637.41	2,869,084.88	2,886,045.53	8.31	8.78				

Click to add comment

## Marketing Planning

- Use FP&A financial targets as a base for the budget, for both revenue and marketing expenses.
- Plan marketing campaigns and related activities, impacting revenue and expenses, then analyse the results.
- Adjust total revenue plans directly or using driver adjustments, and comment on the reasons behind the changes.
- Analyse product performance at a global, regional and product level with the provided dashboard.

### Marketing Demand Planning

Market Drivers

Consumer Trend	Market Share
Cruise	0.50% 1.00%
Mount...	0.50% 1.00%
Exercise	0.50% 1.00%
Racing	0.50% 1.00%
Youth	0.50% 1.00%

Apply Drivers

**Marketing Demand Planning**

SAP\_MKT\_IM\_MarketingPlanning  
4 Filters 1 Hidden

Version: Plan  
Date: 2023

Measures: Amount

Product	Driver	2023	Q1 (2023)	Q2 (2023)	Q3 (2023)	Q4 (2023)	2024	Q1 (2024)	Q2 (2024)	Q3 (2024)	Q4 (2024)
Total Bikes	Totals	\$155,825,963	\$41,032,262	\$45,999,850	\$38,497,583	\$30,297,689	\$146,828,578	\$35,016,459	\$45,807,814	\$37,526,660	\$28,783,646
	Base Line	\$144,232,372	\$38,124,262	\$42,517,291	\$35,026,865	\$28,564,155	\$148,230,802	\$35,312,989	\$46,015,513	\$37,864,893	\$29,037,217
	Campaign Lift	\$7,101,525	\$1,349,202	\$2,205,740	\$2,420,118	\$1,126,486	\$0	\$0	\$0	\$0	\$0
	Consumer Trend	\$1,442,334	\$381,243	\$425,173	\$350,267	\$285,642	\$0	\$0	\$0	\$0	\$0
	Market Share	\$2,884,647	\$762,485	\$850,346	\$700,533	\$571,263	\$0	\$0	\$0	\$0	\$0
Cruise	Totals	\$25,979,312	\$10,790,963	\$10,056,967	\$8,626,716	\$6,504,666	\$33,793,827	\$9,251,835	\$10,063,889	\$8,433,456	\$6,094,647
	Base Line	\$33,415,023	\$10,073,779	\$9,441,364	\$7,930,186	\$5,969,714	\$33,963,845	\$9,298,327	\$10,104,411	\$8,475,833	\$6,085,073
	Campaign Lift	\$1,176,716	\$0	\$332,362	\$458,646	\$385,709	\$0	\$0	\$0	\$0	\$0
	Consumer Trend	\$334,150	\$100,738	\$94,414	\$79,302	\$59,697	\$0	\$0	\$0	\$0	\$0
	Market Share	\$668,300	\$201,476	\$188,827	\$158,603	\$119,394	\$0	\$0	\$0	\$0	\$0
Price Impact	\$395,122	\$414,971	\$0	\$0	-\$29,849	-\$189,818	-\$46,492	-\$50,522	-\$42,379	-\$30,425	

### Marketing Performance Analysis

Filter: Company Code: All Company Code, Date: 2023, Product: Total Bikes, Marketing Campaign: Active Campaigns, Unassign...

**Gross Revenue per Date** (in Million USD): Actual 475.09, Plan, Budget

**Marketing Expenses per Date** (in Million USD): Actual 12.90, Plan, Budget

**Gross Margin per Date** (in Million USD): Actual 127.56, Plan, Budget

**Detailed Analysis Breakdown**

**Gross Revenue per Date, Product** (in USD): 2023 Cruise: 109,905,029; Mount...: 150,715,579; Exercise: 36,387,738; Racing: 117,139,816; Youth: 51,978,128

**Gross Revenue per Date, Product** (in USD): Stacked bar chart by Product (Cruise, Mount, Exercise, Racing, Youth) across Q1-Q4 2023.

**Gross Revenue per Company Code** (in USD): Donut chart showing 32.69% and 34.52%.

### Marketing Budget Planning

Filter: Company Code: All Company Code, Date: 2024, Version: Budget, Product: Total Bikes

**Investment Rate (%)**, **Revenue per Date**, **Spend per Date**

Manage the allocation of marketing budget per country and product.

- Initialize your Budget version if necessary by clicking on the "Initialize Version" button.
- Manually adjust marketing expenses and gross revenues in the planning table.
- Recalculate quantities by hitting the "Recalculate Quantities" button afterwards.
- Publish or revert your results by clicking on the "Confirm" or "Reset" button.

**Budget Allocation**

Initialize Version Recalculate Quantities Reset Confirm

Planning Table: 1 Filter 1 Hidden 1 (5)

Company Code	Product	Date	GL Account	Measures	Version

## **Data Connectivity**

- Leverage S/4 HANA master data, actuals, and list prices.
- Leverage planned standard COGS from the Integrated Financial Planning content \*
- Leverage IBP statistical baseline demand volumes.
- Provide IBP with commercial spend drivers that can be used to generate total statistical demand volumes.

\*Prerequisite: Import Integrated Financial Planning for SAP S/4HANA first for COGS integration.