

dash Business Planning Tool

What is the dash Business Planning Tool?

The dash Business Planning Tool empowers you to streamline your forecasting process based on various business drivers. It includes forecasting and analysis functionalities which enable you to make informed decisions. You can also monitor business impact by adjusting various business drivers like agent count, average sales price, etc.

Why would I use the dash Business Planning Tool?

With this tool you are able to model different scenarios. You can play with the numbers in your plan and create “what if” scenarios before deciding on a specific plan. This is an important piece of creating your roadmap and gauging what is required of you and your company to get you to your desired destination. With the business planning tool, you can now track your progress towards the financial and production goals you have set in each business plan.

Another great feature about this tool is that all of your performance metrics are now in dash. Overall, the dash Business planning tool helps you keep track of the most important things through proper planning, monitoring, and execution

Who has access to the dash Business Planning Tool?

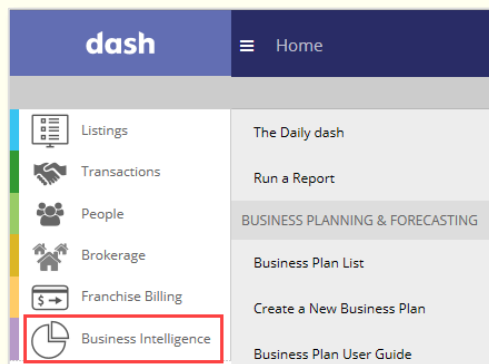
Only individuals with the Brokerage Admin and Office Manager security roles will have access to Business Planning Tool. If you have been assigned access to multiple offices, you will be able to access and create business plans for those offices. If you have been assigned access at an office level, you will only be able to access and create business plans for only that office.

Examples

- ➡ Brokerage Admin + Company Data Entry = access at the Company Level
- ➡ Brokerage Admin = access limited to office or offices
- ➡ Office Manager + Company Data Entry = access at the Company Level
- ➡ Office Manager = access limited to office or offices

How do I access the dash Business Planning Tool?

1. Log into dash.
2. From the left menu, click **Business Intelligence**.
 - If you already have a Business Plan, select **Business Plan List**.
 - OR
 - To create a plan, select **Create a New Business Plan**.



How do I create a new business plan?

- In the Business Plan & Forecast screen, enter the required fields marked with a red astrisk:
 - Plan Name**
 - Plan Year** - *By default, the start date is the current month-year and end date is 12 months from the start date. But you can choose a different date from the dropdown and system populates the end date accordingly.*
 - Reference Period** – *By default, the reference period is the 12 months prior to the Plan Year. But you can choose a different period (either 12 months prior or 24 months prior) from the dropdown.*
 - Target Type** – *Choose from three options: **Profit**, **Sides**, and **Total Income**.*
 - Forecast Type** - *Choose from three options: **Non Sales**, **Brokerage Sales**, and **Brokerage Sales and Non Sales**.*
- Select the office (or offices) you want to include in the plan. Click to select an office from the left column, and it moves to the right column.
*Tip: If you want to include all offices, click **Select All**.*
- Click **Forecast & Analysis**.

Business Plan & Forecast

Create a Plan Forecast & Analysis Review & Activate

1

PLAN NAME *

2

PLAN YEAR * Jul-2018 Jun-2019

REFERENCE PERIOD * Jul-2017 Jun-2018

TARGET TYPE * Profit

FORECAST TYPE * Brokerage Sales & Non

Offices to include in this Plan

3

ALL OFFICES Select All Remove All

0003 - 190 Water Street, Conneaut Lake (Satellite)

0005 - 631 W. Spring Street, Titusville (Satellite)

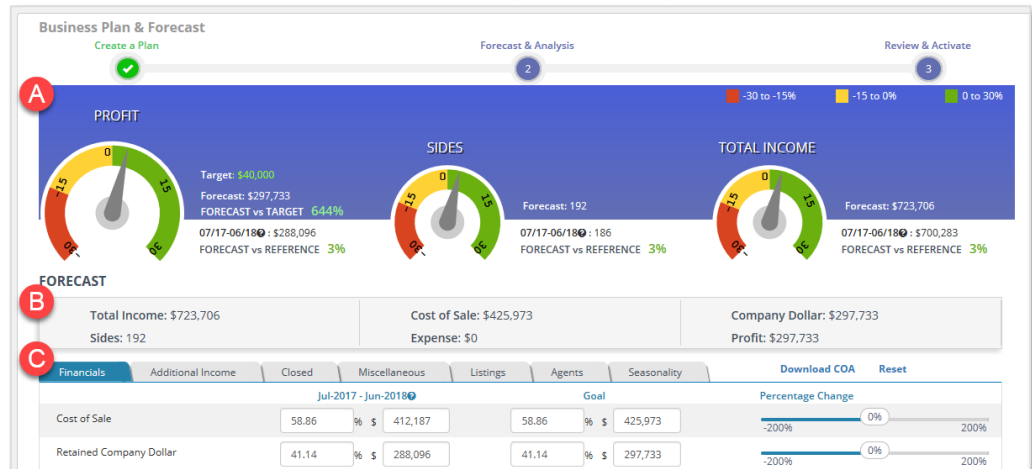
0001 - 751 North Main St, Meadville (Main office)

Save Forecast & Analysis

How do I create a new business plan? (continued)

There are three main sections in the **Forecast & Analysis** screen:

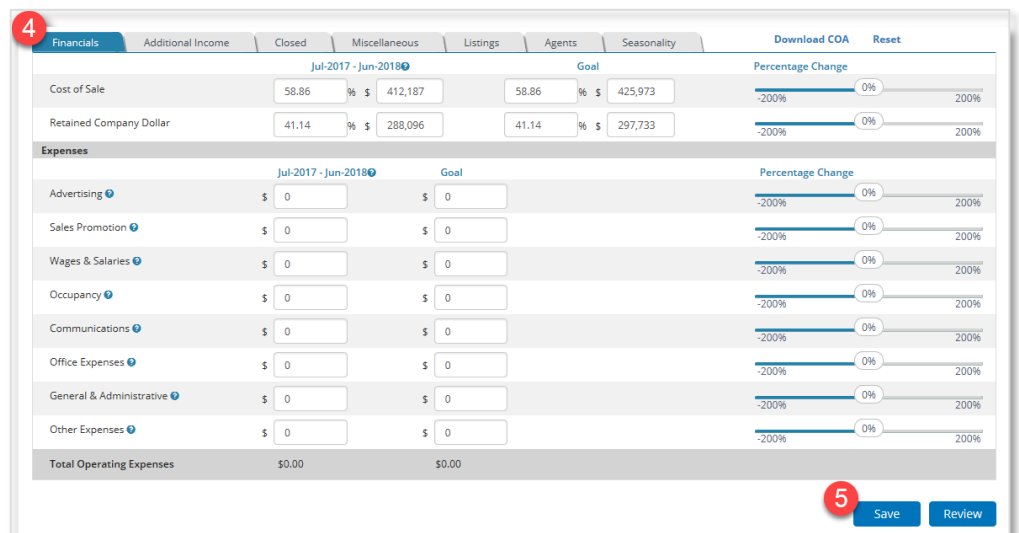
- A. **Forecast data gauges** - This includes three gauges comparing current data against the reference period selected in the previous screen. The option selected as the Forecast Type is enlarged.
- B. **Projected forecast data** – This is populated with detailed data points that drive the Business Plan.
- C. **Tabs with the drivers contributing to the forecast** – The information contained in each tab can be used to adjust various drivers impacting the forecast.



4. Add or update the data in the seven tabs within the **Forecast & Analysis** screen.

Note: The tabs are defined later in this document.

5. Click **Review**.



How do I create a new business plan? (continued)

- Review the data displayed in the **Forecast & Analysis** screen. If any data needs to be edited, click the **pencil** icon on the right side of the screen.
- Once you confirm the data is correct, click **Activate**.

The screenshot shows the 'Business Plan & Forecast' interface. The top navigation bar includes 'Create a Plan' (with a green checkmark), 'Forecast & Analysis' (with a green checkmark), and 'Review & Activate' (with a blue circle containing the number 3). A red circle with the number 6 is positioned over a pencil icon in the top right corner of the Plan Details section.

Plan Details

PLAN NAME	mary3	PLAN ID	0016
PLAN YEAR	Jul - 2018 to Jun-2019	REFERENCE PERIOD	Jul - 2017 to Jun-2018
TARGET TYPE	Profit - \$40,000	FORECAST TYPE	Brokerage Sales & Non Sales

Offices included in this plan

0001 - 751 North Main St, Meadville (Main office)	0003 - 190 Water Street, Conneaut Lake (Satellite)	0005 - 631 W. Spring Street, Titusville (Satellite)
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Forecast & Analysis

FORECAST

Total Income: \$723,706	Cost of Sale: \$425,973	Company Dollar: \$297,733
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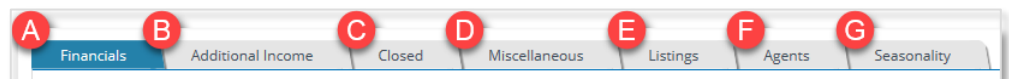
The bottom section shows a detailed financial breakdown and a seasonality table.

Technology Fee (Sales Associate)		\$0
Other Misc. Income		\$0
FINANCIALS		
Cost of Sale	58.86%	\$425,973
Retained Company Dollar	41.14%	\$297,733
Expenses		
Advertising		\$0
Sales Promotion		\$0
Wages & Salaries		\$0
Occupancy		\$0
Communications		\$0
Office Expenses		\$0
General & Administrative		\$0
Other Expenses		\$0
Total Operating Expenses		\$0

	Listing Seasonality%	Open Seasonality%	Closed Seasonality%
January	8.14%	5.34%	7.62%
February	5.23%	7.77%	5.24%
March	6.98%	11.65%	6.67%
April	13.37%	11.65%	9.05%
May	11.63%	1.46%	8.57%
June	0%	0%	0%
July	9.88%	12.14%	9.52%
August	13.37%	10.19%	10%
September	11.05%	10.68%	11.90%
October	9.88%	14.08%	12.38%
November	3.49%	7.77%	11.43%
December	6.98%	7.28%	7.62%
TOTAL	100%	100%	100%

At the bottom right, there are 'Save' and 'Activate' buttons. A red circle with the number 7 is positioned over the 'Activate' button.

What information is contained in the Create a Plan tabs?



- Financials** – This represents the P&L numbers (Company Dollar, Cost of Sale and Expenses) which impact the total income and the profit.
- Additional Income** – This represents income received from various sources including rental, lease, property management and other ancillary income.
- Closed** – This consists of closing-related metrics which are pre-populated for the reference year.
- Miscellaneous** – This comprises additional metrics which will be used for forecasting and tracking.
- Listings** – This consists of listing related metrics which are pre-populated for the reference year. You can override the projected data in the 'Goal' field by either updating the numbers or use the slider to change the percentage.
- Agents** – This represents the agent count for each month in the forecast year. By default, the agent count as of the last month in the Reference period is populated for all the months.
- Seasonality** – This highlights the monthly performance of the office(s) selected. The default seasonality is populated based on the previous year's metrics for the selected office(s). However, you can override the seasonality percentage for the respective months.