dash Business Planning Tool

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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**.
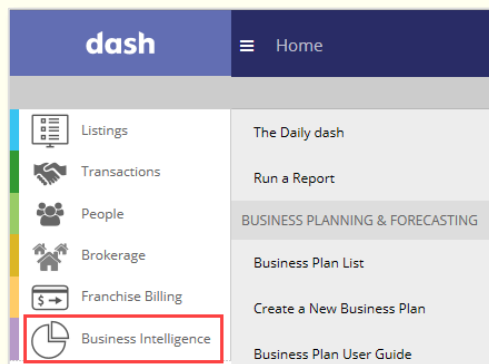
How do I create a new business plan?	1. In the Business Plan & Forecast screen, enter the required fields marked with a red astrisk:
	Plan Name **Plan Year** - *By default, the start date is the current month-year and end date is 12 months from the start date. But you can choose a different date from 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**.*
	2. 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**.
	3. Click **Forecast & Analysis.**

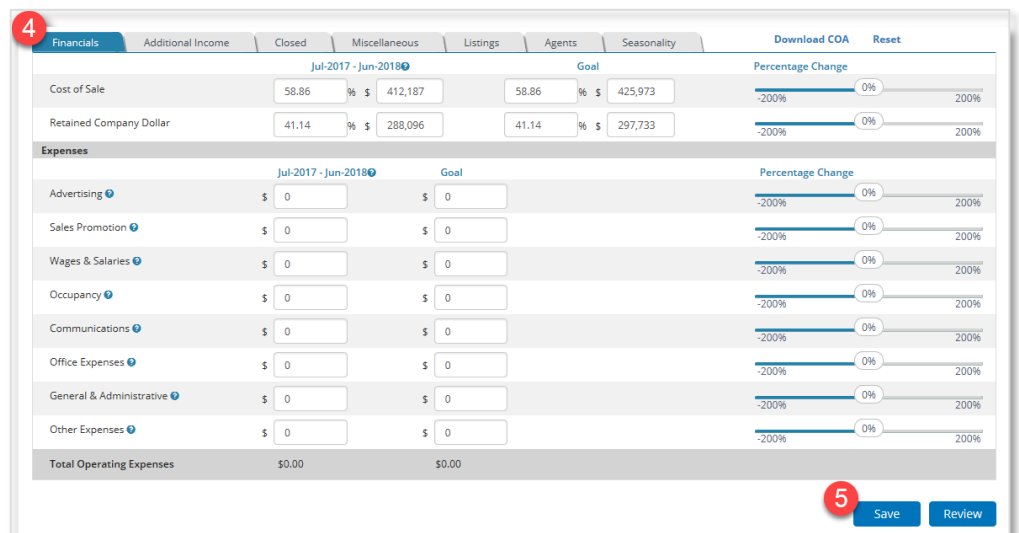| **How do I create a new business plan?** *(continued)*	There are three main sections in the **Forecast & Analysis** screen:

A. **Forecast data gauges** - *This includes three gauges compaing 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.*
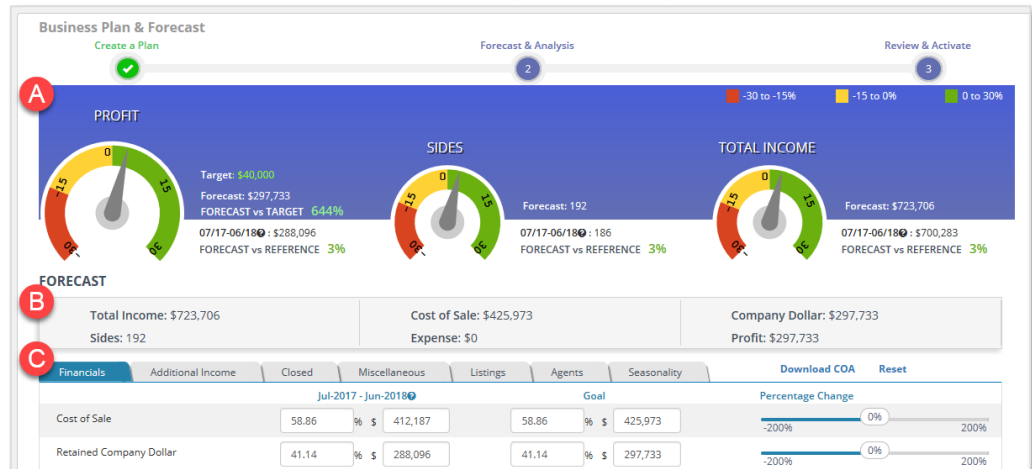
4. Add or update the data in the seven tabs within the **Forecast & Analysis** screen.
   Note: The tabs are defined later in this document.

5. Click **Review**.

How do I create a new business plan? *(continued)*	6. 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. 7. Once you confirm the data is correct, click **Activate**.

What information is contained in the Create a Plan tabs?
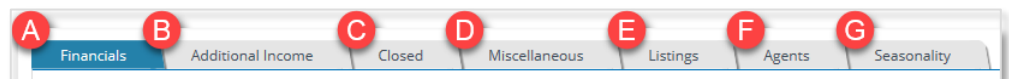
A. **Financials** – This represents the P&L numbers (Company Dollar, Cost of Sale and Expenses) which impact the total income and the profit.

B. **Additional Income** – This represents income received from various sources including rental, lease, property management and other ancillary income.

C. **Closed** – This consists of closing-related metrics which are pre-populated for the reference year.

D. **Miscellaneous** – This comprises additional metrics which will be used for forecasting and tracking.

E. **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.

F. **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.

G. **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.