

Retail Planning Five-Check Review

Find the decision gap before replacing the system

Enterprise Intelligence Group | Working aid, not a maturity score or benchmark

Scope: category / location group / planning horizon / review owner / review date.

Check	Evidence to bring	Decision to record
1. Demand	Sales, availability, ranging and promotion timing	What is observed demand evidence, and what remains an estimate?
2. Overrides	Original and revised forecast, reason, approver, expiry	Was the intervention justified, and what will test its value?
3. Ordering rules	Lead times, pack sizes, delivery calendar, stock and open orders	Which input or constraint needs correction, and who owns it?
4. Trade-offs	Supply/capacity limits and commercial priorities	Who decides when margin, availability and working capital conflict?
5. Feedback	Receipts, shelf/customer execution, service, inventory and waste	What changes next, who owns it and when will it be checked?

Illustrative finding: a promoted line runs short in one store group. The team confirms a delivery restriction was missing from the planning decision. That does not prove the forecasting model failed. Record the evidence, correct the constraint, agree the next test and review availability alongside inventory.

Record one next action: finding / evidence or unresolved assumption / decision owner / action / due date / success measure.

Bring one planning challenge to EIG. We help retail, CPG and distribution teams review data, rules, decisions and delivery. Discuss a scoped review: <https://enterpriseintelligencegroup.com/Contact>