Seasonal Forecasting Proposal for Marlow Home Goods

Fictional sample · Fieldstone Analytics for Marlow's COO and Head of Merchandising

Agenda: what we heard, approach, plan, investment, next step · v3, approved by delivery 10 March

What We Heard

From our discovery conversations. Does this match your view?

- "We rebuild the forecast in spreadsheets every week."
- Outdoor furniture was over-ordered last spring
- You want a forecast your team reviews, not one it builds

The Challenge: Forecasts Use Last Year's Sales Without Promotion or Weather Inputs

Based on the sample files Marlow shared in discovery

Proposed Approach: Start With Two Seasonal Categories

- Pilot two seasonal categories, including outdoor furniture
- Inputs: Marlow's sales history plus promotion and weather data
- Each week, merchandising reviews a forecast instead of building one

A Comparable Retail Engagement

Described with that client's written permission

- Regional retailer, also rebuilding seasonal forecasts weekly
- Moved two categories to a weekly forecast review
- Two references available on request

Plan: What Happens After Yes

1

Discovery

Marlow merchandising lead + Fieldstone delivery lead

2

Data setup

2 weeks · Marlow IT + Fieldstone data lead

3

Pilot

8 weeks · two seasonal categories

4

Joint review

Results and decision on wider rollout

Investment and Scope Options

Fictional figures for illustration

OPTION	SCOPE	DURATION	PILOT FEE
A	Two seasonal categories	10 weeks	$40,000
B	Two categories plus one evergreen	12 weeks	$55,000

Next Step: Decide the Pilot Scope by 14 March

This week: data access request to Marlow IT

Owners: Marlow COO (decision) · Fieldstone delivery lead (data request)

Leave-Behind: Seasonal Forecasting Pilot

One-page summary for Marlow Home Goods · Fictional sample

	SUMMARY
What we heard	Weekly spreadsheet rebuilds; outdoor furniture over-ordered last spring
Approach	Two-category pilot adding promotion and weather inputs
Plan	Data setup (2 weeks), pilot (8 weeks), joint review
Investment	Pilot fee and scope as in the proposal, slide 9
Decision	Pilot scope approval by 14 March
Contacts	Account lead and delivery lead (names and emails)

Appendix

- A. Data requirements
- B. Security questionnaire answers
- C. Team bios