



Managing rolling forecasts with Microsoft® Forecaster

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Agenda

- What is a rolling forecast?
- The advantages of rolling forecasts
- Working with rolling forecasts
- Designing and implementing the process

What is a rolling forecast?

“Budgeting for the year ahead was during a time of stable markets, stable costs, and predictable inflation”.
– John Stretch



What is a rolling forecast?

- Flexible
- Focused on current knowns and constraints
- Driver-based
- A bottom-up solution

Advantages of a rolling forecast

- Priorities change
- The market changes
- Continuous conversations versus an annual event

Working with rolling forecasts

- Driver-based
- Short cycles for making changes
- Continuous

A photograph of three business professionals in an office setting. In the foreground, a man with dark hair, wearing a light blue shirt and a patterned tie, is shown in profile, looking towards the right. In the background, a man with a shaved head, wearing a light purple shirt, is smiling and looking towards the camera. A third person, a woman with dark hair, is partially visible on the right side of the frame, wearing a grey top. The background is a bright, modern office with large windows and white structural elements.

Working with rolling forecasts

Designing and implementing rolling forecasts

- Focus on reusability
- Reporting

A background image showing a group of business professionals in a meeting. A man in a white shirt and tie is in the foreground, looking towards the right. Another man in a white shirt is smiling in the background. A blue semi-transparent box is overlaid on the image, containing the text.

Designing and implementing rolling forecasts

Tips and tricks

- Plan for your calculations to be reusable
- Look for correlation to drivers and build appropriate calculations
- Dynamic reports

Microsoft Forecaster SP 5

- Now available!

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