

# Collaborative Marketing Driven by Advanced Analytics Summit

Ensuring Your Successful TPM-TPO  
Retail Execution Journey



## Developing the Collaborative Marketing and Leadership Skills Needed Today

**John Stanton**, Professor of Food Marketing, SJU

**Lisa Gibbons**, Sr. Trade Marketing Mgr, Green Mountain Roasters

**Julee Johnson**, Sr. Analyst, Strategic Pricing & Customer Management  
Solutions Team, Starbucks



# CCM Leadership and Graduates



## **John Stanton**

*Professor of Food Marketing, Saint Joseph's University*

John L. Stanton has a Ph.D. in Quantitative Methods and Marketing from Syracuse University and has been in the food industry for about 40 years. Dr. Stanton had also worked in the food industry, having been VP Marketing for Melitta, and Tengelmann in Germany. Dr. Stanton was also director of research of an ad agency consulting with food companies including Campbell Soup, P & G, Acme, Kroger, Frito Lay, Kellogg and others.

John serves on the Board of Directors of a number of food companies including Herr's Foods, Premio Foods, The Philadelphia Cheesesteak Company, Promotion Optimization Institute, and David Michael.

Dr. Stanton has served as an expert and expert witness to many food and beverage companies including Whole Foods, Target, Coca Cola, Ahold, Supervalu, Boars Head, Safeway and many others. He has written 10 books and is currently the editor of the Journal of Food Products Marketing and an editorial advisor of the British Food Journal.



# CCM Leadership and Graduates



## **Lisa Gibbons**

*Senior Trade Marketing Manager, Green Mountain Coffee Roasters, Waterbury, NH*

Lisa acts as the focal point between field sales, finance and IST for the trade promotion management. She has worked with TPO and TPM systems and done forecasting, budgeting and training. She's managed sales analysis, sales administration and sales operations teams as well. With over 20 years' experience, she has been at a number of other leading Vermont CPG companies: Seventh Generation, Cabot Creamery and Ben & Jerry's.

She has an MBA from the University of New Hampshire.



## **Julee Johnson**

*Sr. Analyst, Strategic Pricing & Customer Management Solutions Team, Starbucks*

Julee began her journey as a Starbucks partner October, 2013. In her role, Julee supports promotional planning activities, leads user training and provides spend and revenue analysis. In addition, she also acts as the Product owner for the Siebel Enhancements project working cross functionally with IT partners to releases new features and functionality for trade system users. Julee has been a part of the POI community for the past 2 years with this being the fourth summit she has attended. She is also a newly minted graduate of the Certified Collaborative Marketing program, graduating summer of 2015.

Julee earned her BA in International Business at Seattle Pacific University and completed a 3 month study aboard at Southwest University in China. She has had experience working in retail, non-profit, higher education and city government and most recently in CPG. Although she grew up in Southeast Asia, Julee now calls Seattle her home. Her favorite Starbucks beverage is a Caramel Macchiato!



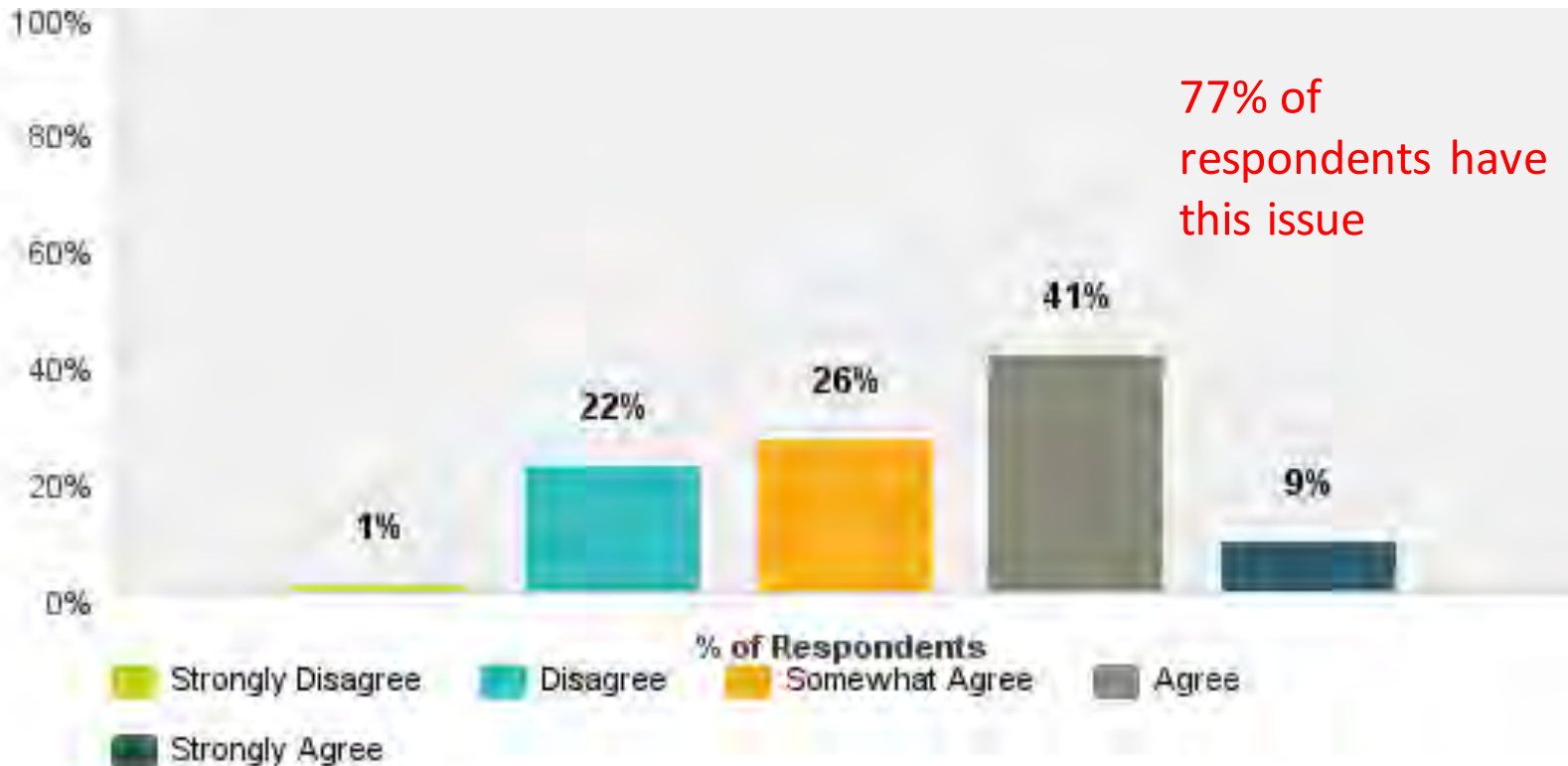
# Why continuing education and skills development is critical in our industry!

- The importance of education
- The difference between education and training
- How can leading companies invest in their people



# Lack of qualified personnel

Q8: [You have] Challenges finding qualified personnel who can use and understand existing solutions.

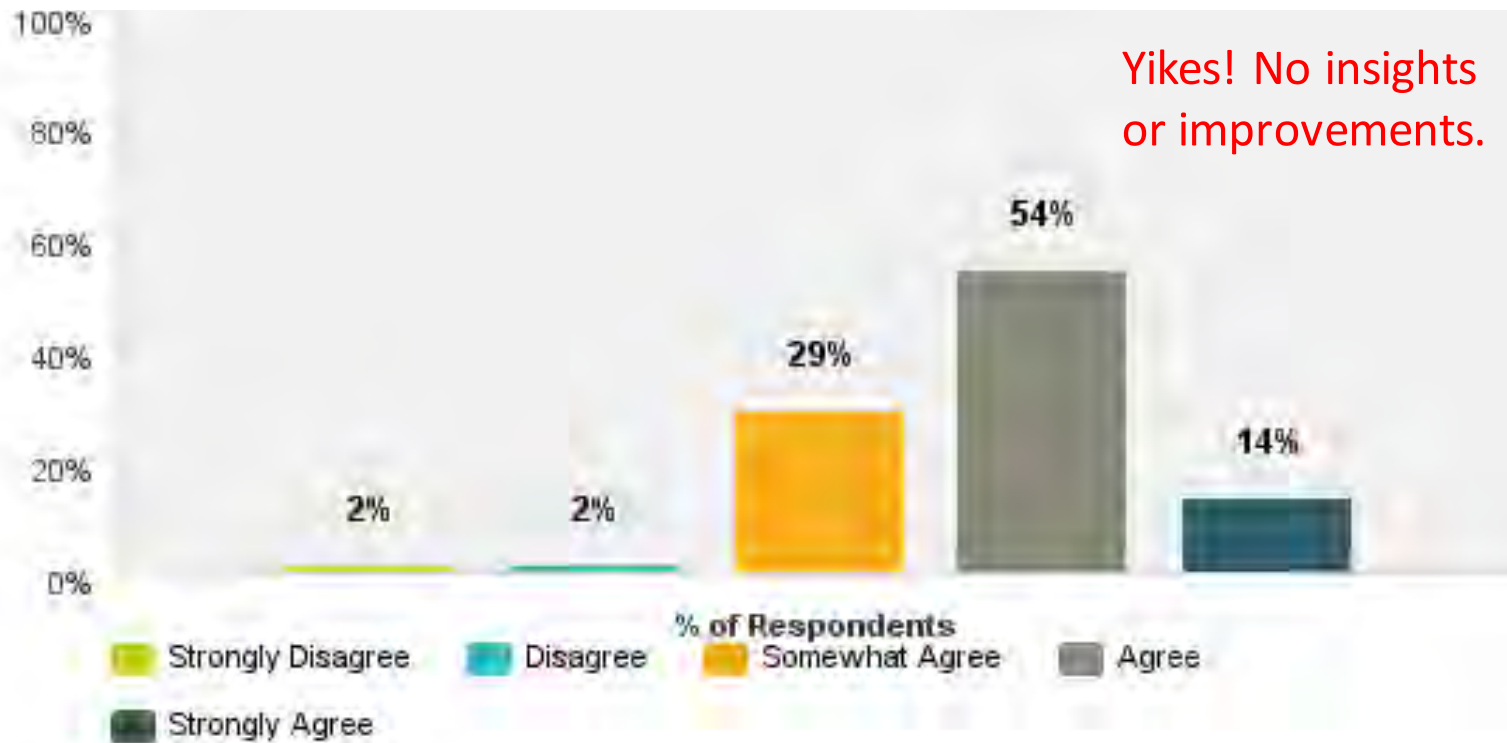


Source: POI Research. "The POI 2015 TPx and Retail Execution Survey".



# Inability to move from transactional to analytical

Q44: [You have] Challenges moving capabilities from being transactional to more analytical.



Source: POI Research. "The POI 2015 TPx and Retail Execution Survey".





# About the CCM: Course Overview

- **The Certified Collaborative Marketer – CCM™, accredited Executive Certification Program** is very specifically designed to develop the skills of current and future leaders in food and consumer brand product - **CPG** industries
- Explores how organizations develop and implement strategy, core functional areas of business– from sales to marketing to finance –teaching participants a solid understanding of each function and how it contributes to organizational success
- CCM training teaches the techniques, tools and approach for analyzing and building effective TPM-TPO marketing, promotions, sales and merchandising strategies
- Broadens perspective, thru collaborating with a group of peers and analyzing the TPM and TPO activities in your company
- Participants can create the improved strategies, and approach for analyzing and building cost effective marketing, promotions, sales and merchandising and implementing them into your company



## CCM Designation Benefits

The skills that are taught include:

- Planning
- Executing
- Analysis
- Evaluating Shopper Insights
- Leadership Decision Support
- Collaboration



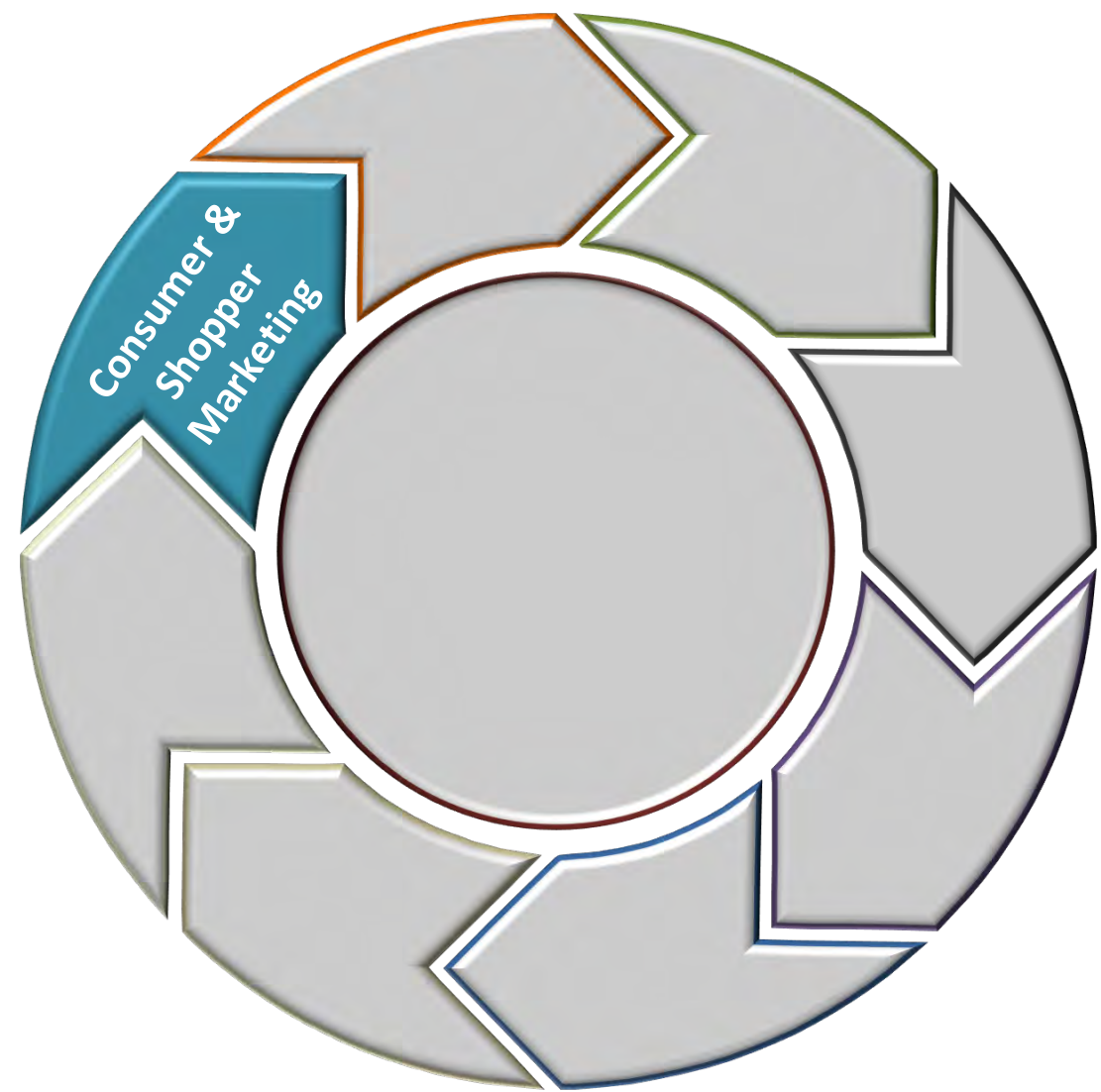
# The Certified Collaborative Marketer – CCM: Executive Certification Program Curriculum Overview



# Consumer & Shopper Marketing

## Consumer & Shopper Marketing

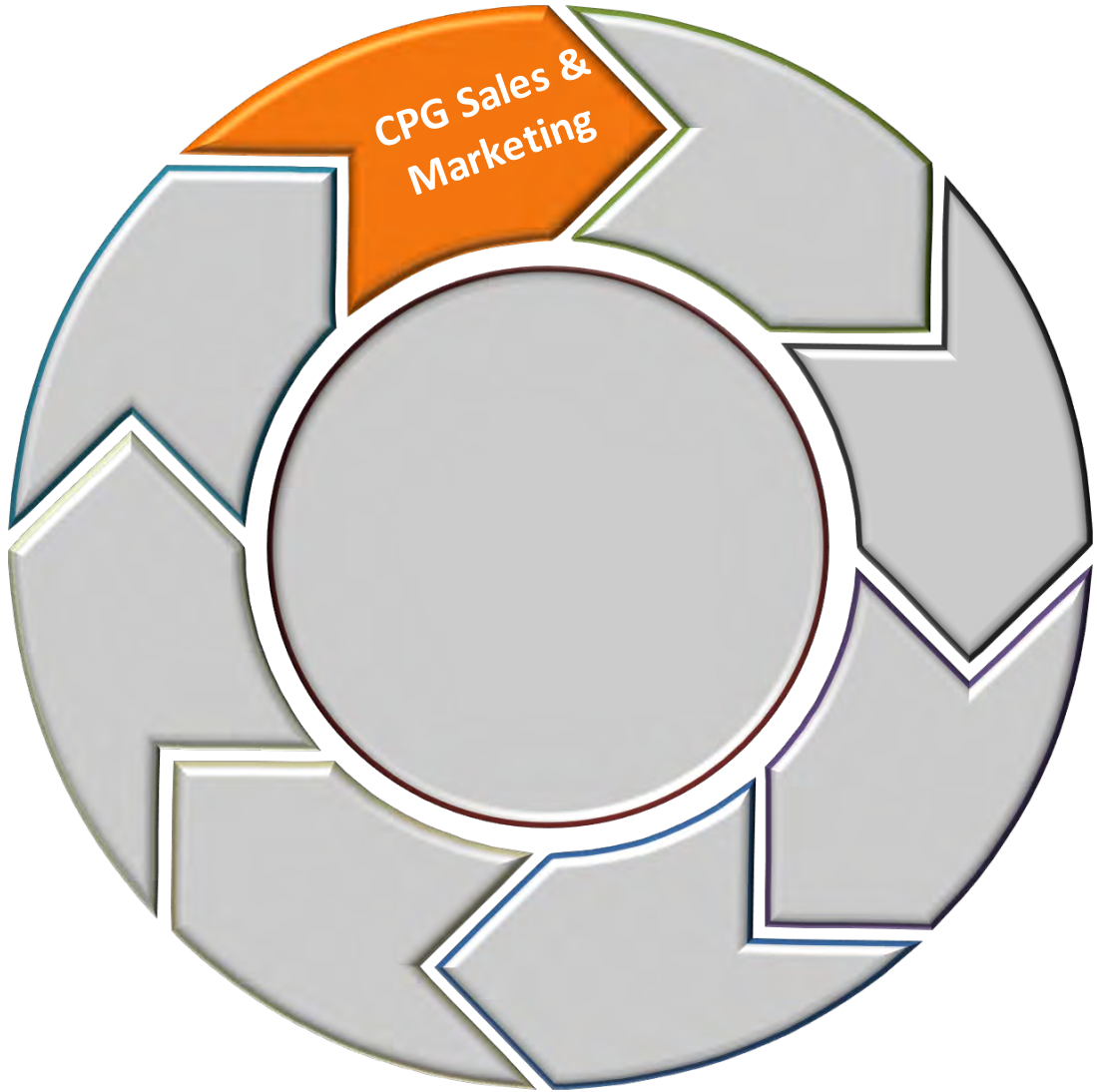
- **Course Learning Objectives**
- Understand the difference between a Shopper Insight and a Consumer Insight and how to use them
- Learn which organizational approach best fits your company's needs and commitment
- Define cross functional linkages and approaches for strengthening collaboration to improve results
- Understand a set of tools and processes to consider implementing to improve your companies ROI on shopper insight and shopper marketing investments



# CPG Sales & Marketing

## CPG Sales & Marketing

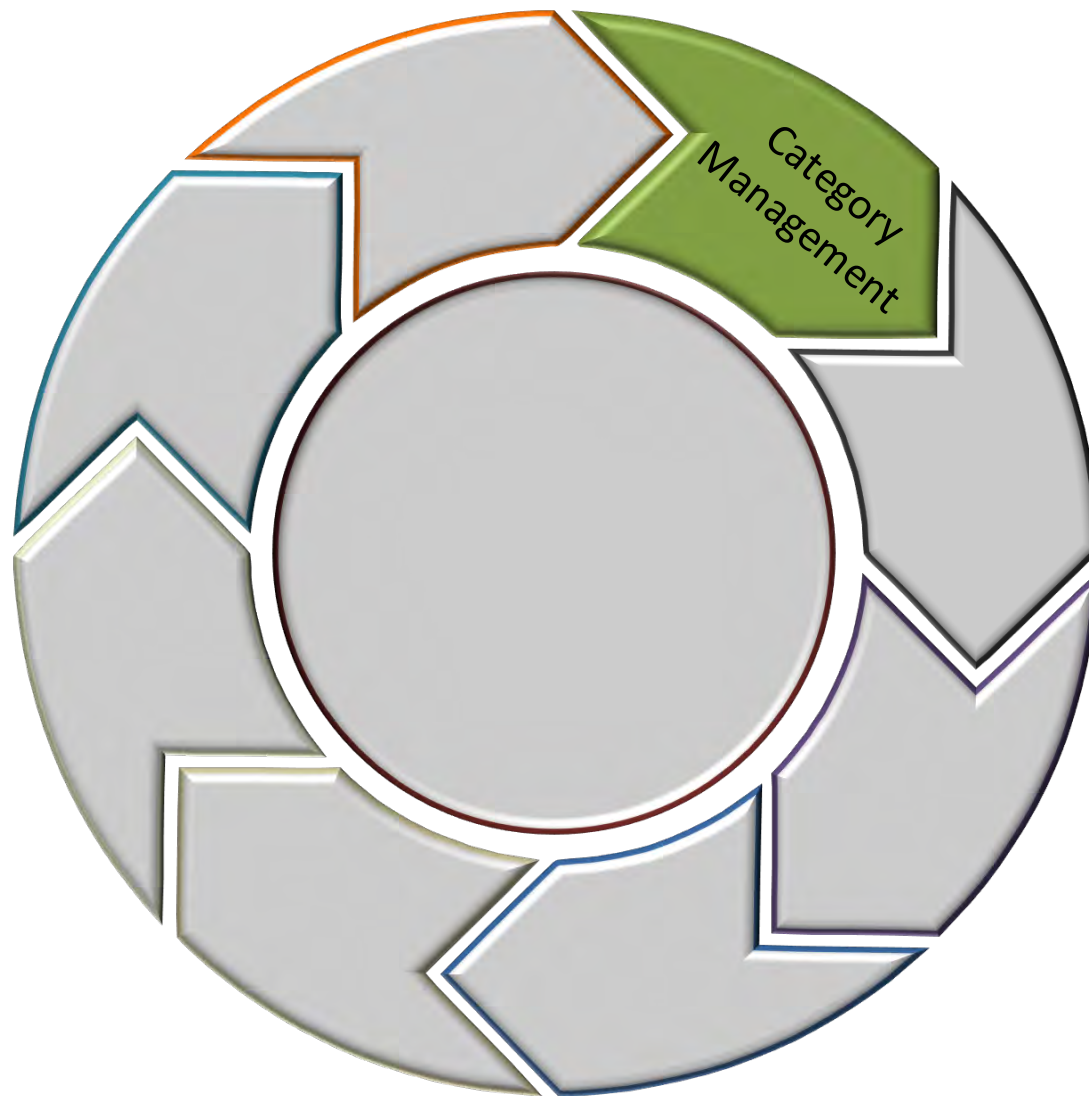
- **Course Learning Objectives**
- Decide which categories, customers, media best matches the company's needs with the available data and capabilities
- Determine the most likely outcome for cycle of planned promotional events
- Analyze results of mutual goals
- Communicate these results to colleagues both up and down the planning chain



# Category Management

## Category Management

- **Upon completing this course, you will be able to:**
- Engage effectively with internal and external cross-functional teams relative to how Category Management is an integral component of the Trading Partner Relationship.
- Understand the role Category Management plays in optimizing Promotion ROI.
- Understand the importance of moving beyond the 20+ year old eight step Category Management process to a more advanced process that better aligns with today's focus on the shopper and the shopping experience.
- Understand the strategic value of upgrading from conventional Joint Business Planning to the industry's most advanced Collaborative Business Planning Model

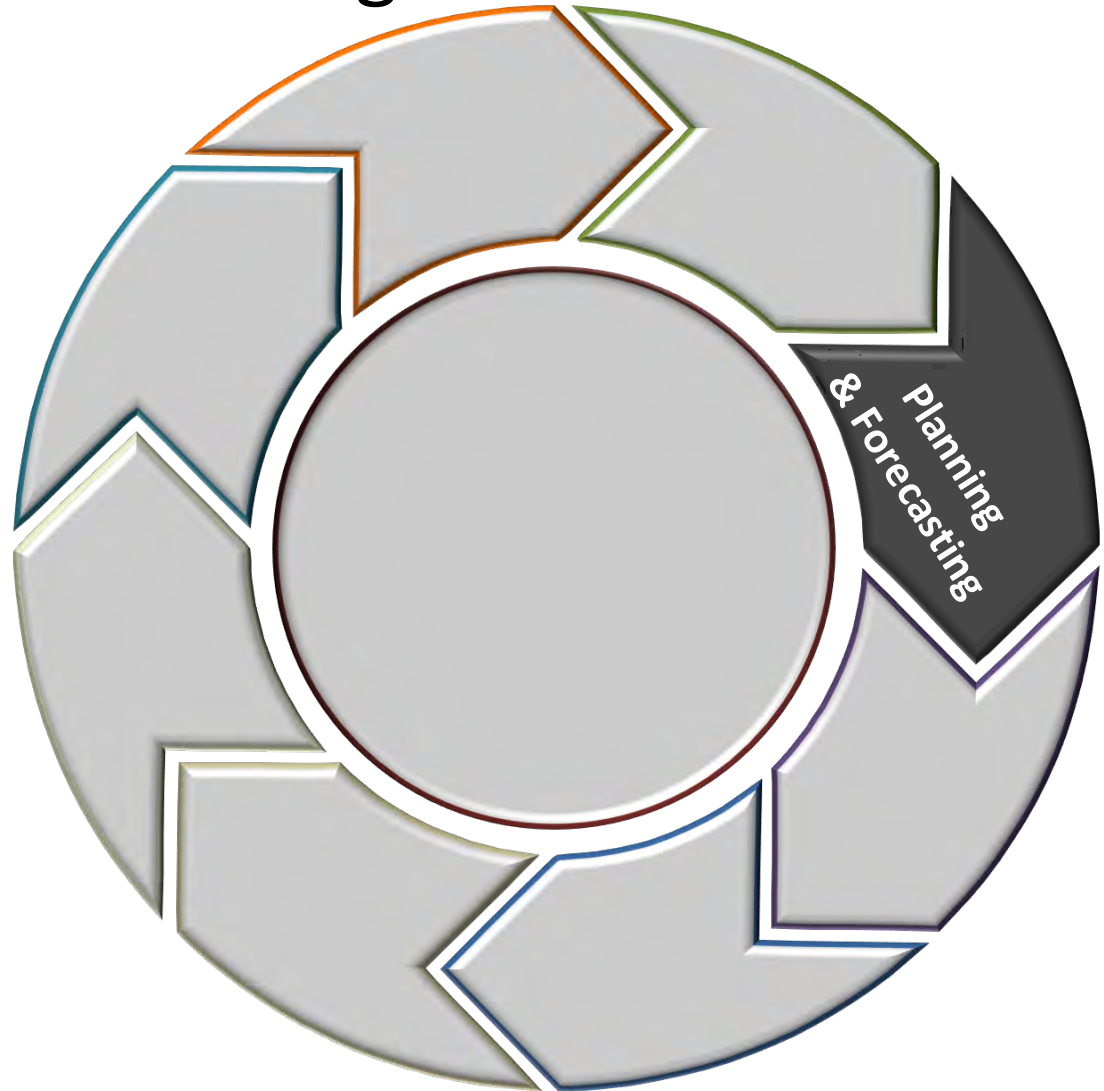




# Supply Chain Management

## Planning & Forecasting

- **Course Learning Objectives**
- Decide which forecasting methods best match the company's needs and available data
- Determine the most likely demand response for a planned promotional event
- Execute a forecasting analysis that has embedded a potential promotional event
- Communicate these results to colleagues both up and down the planning chain



# Retail Advertising & Marketing

## Pricing Methodology

- **Upon completing this course, you will be able to:**
- Engage effectively with internal and external cross-functional teams
- Better understand their existing role with teams
- Know when to bring in outside resources
- Contribute to post-promotion analysis efforts
- Identify mutual sources of data that lead to actionable, measurable outcomes for trading partners
- Effectively communicate to partners the elements that drive certain decisions for mutual benefit





# Analytics, Optimization & Pricing

## Analytics & Optimization

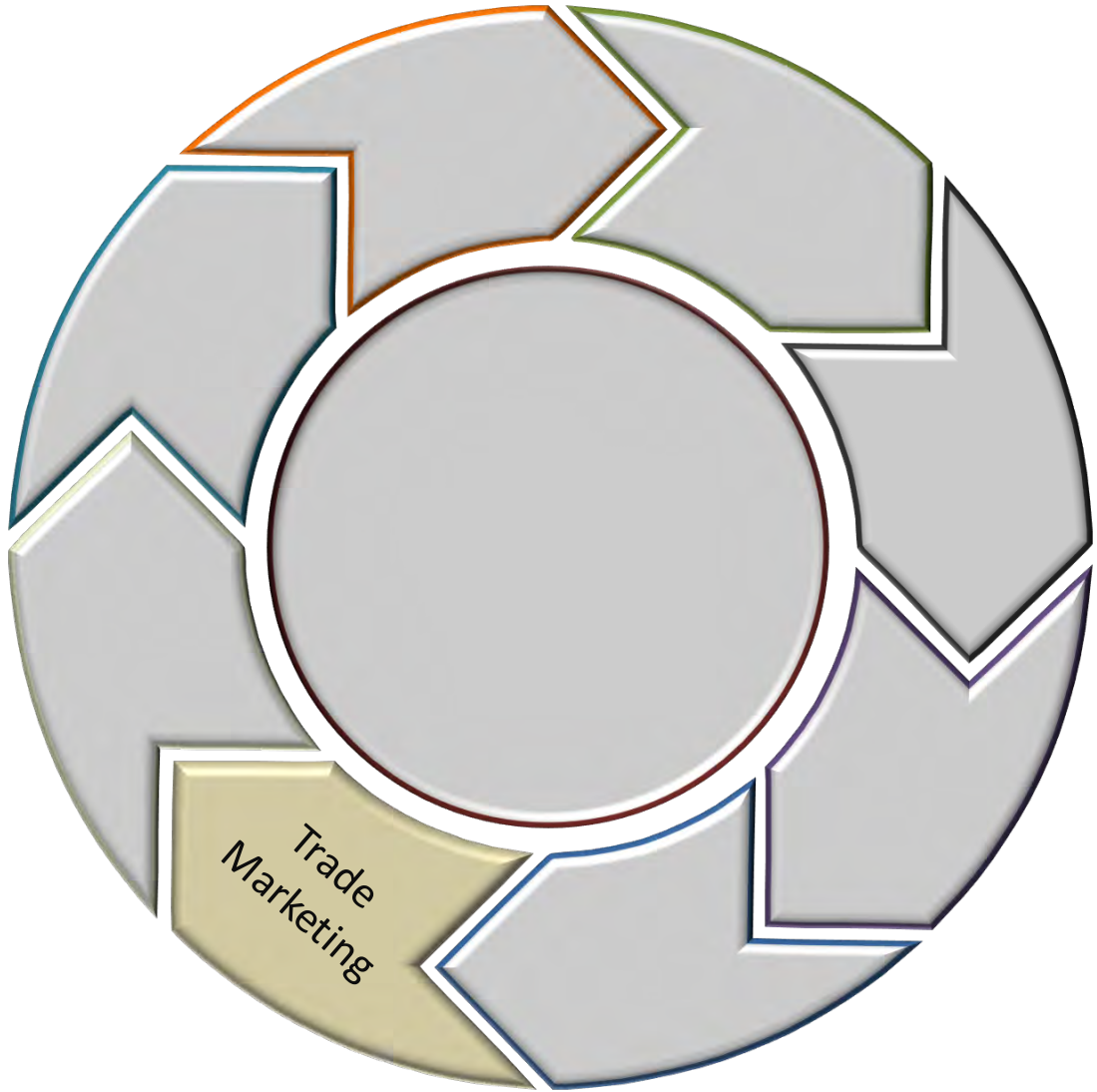
- **Upon completing this course, you will be able to:**
- **Define Predictive Analytics**
- Recall how Predictive Analytics can be used to gain a competitive in business
- Apply basic knowledge on simulation and optimization
- Utilize pragmatic applications for predictive analytics in annual planning and trade promotion spending
- Recognize how Predictive Analytics can be used to collaborate with business partners



# Trade Marketing

## Trade Marketing

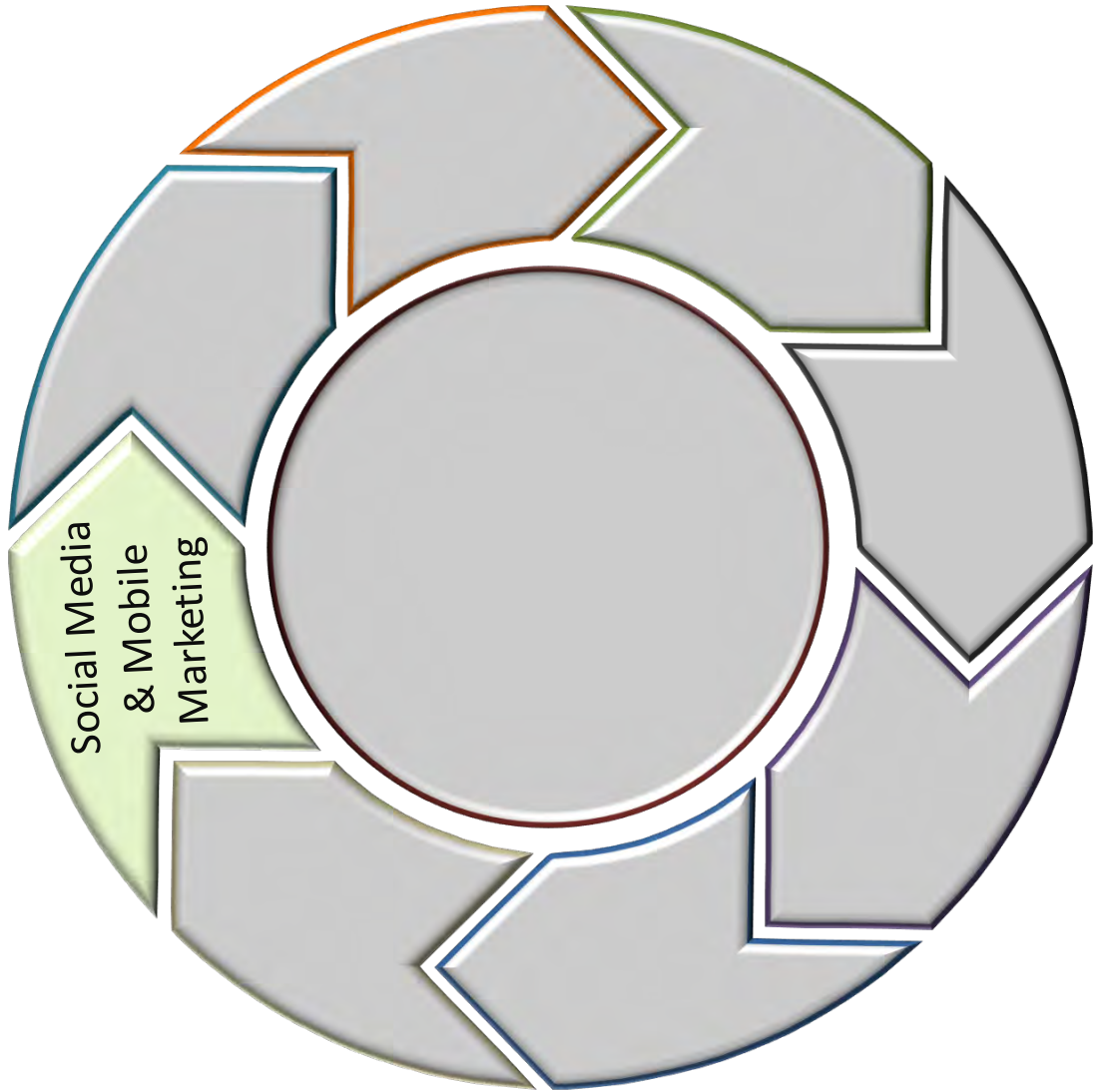
- **Upon completing this course, you will be able to:**
- More effectively communicate trade promotion issues within your organization, and with trading partners and vendors
- Improve the collaboration and results within and across departments with and outside of your company



# Social Media & Mobile Marketing

## Social Media & Mobile Marketing

- **Upon completing this course, you will be able to:**
- Define Social Media and related terms
- Identify the key concepts of social media
- Recall the types of social media and how to use them effectively
- Define social shopping and its advantages
- Understand mobile app, vs. responsive design
- Utilize social commerce site metrics and ROI measurements



# Certified Collaborative Marketer

## CCM Executive Training

- Executive Program held at St. Joe's University in Philadelphia
- Learn Collaborative Cultures & Strategies
- Two day live kick-off, ten week self directed study, 3 day final collaborative workshop event





# CCM Testimonial

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## Certification (CCM)<sup>TM</sup>

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Next Classes Begin June 16-17, 2016!

Program Overview

The Promotion Optimization Institute (POI), in partnership with Dr. John L. Stanton at St. Joseph's University in Philadelphia, offers an educational program leading to a certificate as a Certified Collaborative Marketer (CCM)<sup>TM</sup>. The Certified Collaborative Marketer – CCM<sup>TM</sup>, Executive Certification Program is specifically designed to develop the skills of current and future leaders in food and consumer packaged goods – CPG industries. To succeed in business, individuals must be able to see beyond their own functional area and understand how the organization operates as a whole.

POI Certified Collaborative  
Marketer (CCM)<sup>TM</sup> Testimonial



# The Next Certified Collaborative Marketer – CCM Orientation is June 16-17 at Saint Joseph's University



[www.POInstitute.com](http://www.POInstitute.com)