POI
PROMOTION OPTIMIZATION INSTITUTE

Promotion Optimization Institute, LLC

# POI TPx Vendor Panorama 2017

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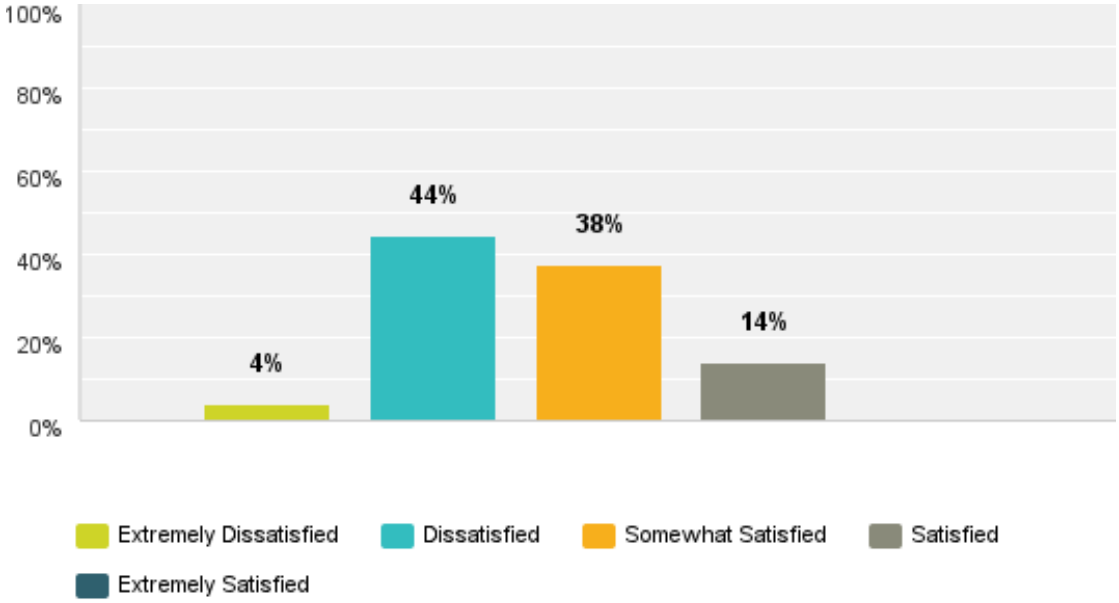
## Introduction

The ability to execute mutually profitable trade promotions continues to be one of the greatest challenges in the industry. While there has been progress made in recent decades, many indicators point to a worse situation on some fronts as retailers feel the encroachment of new formats, such as Amazon, on their top and bottom line. Nevertheless, Trade Promotion (or TPx so that it is inclusive of trade promotion management, trade promotion optimization, trade promotion effectiveness, trade promotion analytics, and acronyms yet to be created) is still highly relevant. It is also becoming more important in emerging markets, such as Latin America and parts of Asia, where modern trade is on the rise. 86% of consumer goods companies tell us at the Promotion Optimization Institute (POI), via the 2017 POI TPx and Retail Execution Survey, that they are not satisfied with their ability to manage trade promotions. And, unfortunately, this level of satisfaction has declined 5 percentage points from the prior year's survey.

**Chart 1: Responses to the statement:**
**"You are satisfied with your ability to manage trade promotions."**




Source: 2017 POI TPx and Retail Execution Survey (a link to the full text of this survey and report is located at the end of this paper).

The survey questioned 77 consumer goods companies of varying sizes. Noticeably absent is a single assertion that a respondent is "extremely satisfied" with the above statement. Nearly half of respondents express a level of dissatisfaction. Given these results, POI seeks to improve the overall management of trade promotions through various methods, including this evaluation.

## Scope of this Analysis

This document builds upon research in the POI Retail Execution Vendor Panorama, which was published in July, 2017. The two are companion documents. The Retail Execution Panorama evaluated the in-store component of the promotion cycle, while this TPx Vendor Panorama focuses on headquarters. Both are part of ongoing leadership efforts by the Promotion Optimization Institute designed to help its members improve their ability to manage trade promotions through the use of enabling technology, and thus improve the entire value chain and enhance trading partner relationships. In this document we evaluate the TPx market and some of the vendors that play in it. Additionally, we will continue to perform the analysis each year, so as to track changes over time through both this analysis and related surveys.

## Key Insights

Some of the most important takeaways from POI's research are as follows:

- There is some differentiation among TPM solutions at the transactional level for planning and executing promotions. What differentiation there is typically can be found in the user experience and ability to evaluate promotions before and after they are executed. Greater differentiation can be found in the ability to predict promotional outcomes and generate insights to improve the overall promotional cycle.
- Data continues to be a real bugbear for the promotional cycle. Only 14% of survey respondents state that they do not have issues with integrating 3rd party data such as POS. This has actually worsened by 9 percentage points from the prior year's survey. It is noteworthy that there is a strong correlation between companies that are satisfied with their ability to manage promotions and their ability to bring external data into the process. This not only impacts the ability to predict promotional outcomes, but also to do meaningful and automated post event analytics.
- Having the right people and processes in place must precede any technology investment. In the previously cited survey a total of 84% or respondents said that they have "challenges finding qualified personnel who can use and understand existing solutions." This is 7 percentage points worse than the prior year's survey.
- Issues persist relative to true collaboration. 85% of survey respondents said that they have issues with getting retailers to execute promotional plans as agreed upon. Better tools that can show promotional outcomes and their financial impacts on both parties can help to reduce this level of noncompliance by increasing retailer "buy-in." This is 5 .percentage points worse that prior year survey.
- Technology is only one component of addressing opportunities around promotion and distribution of consumer goods. Other factors include change management, providing best practices, and having appropriate support available in local markets.

*Greater differentiation can be found in the ability to predict promotional outcomes and generate insights to improve the overall promotional cycle.*

## Recommendations

POI suggests the following strategies for improving your trade promotions:

- Seek to enable all of your trade promotion related processes. We still see a large number of activities that are done in spreadsheets instead of through a system. You are not alone in this regard. Our survey shows that 87% of respondents augment TPx functionality with spreadsheets. We recommend that you evaluate all of your processes when choosing a TPx solution. Adding spreadsheets to compensate for inadequacies in your system of choice only adds cycle time, complexity, and the possibility for errors.
- Prioritize functionality above delivery method. The lines between SaaS, managed services, hosted private cloud, and public cloud are blurrier than ever. Your first decision is whether you will want to do customization to a solution that will take it out of the upgrade path.
- Select capabilities that will help users to be more effective and efficient. Otherwise, why spend the money? 93% of survey respondents said that the "entire process of creating a promotional plan, from budgeting to planning to execution to settlement to post event analytics, takes a burdensome amount of time." Therefore, the user experience should trump all other considerations, including low price points and promises of easy integration.
- Ask for best practices from your vendor. The POI 2017 Survey found a wide disparity between expectations for best practices and what was actually delivered. Furthermore, don't just ask for best practices. Also, find out the background of those who are expected to deliver them. Then, document precisely the sort of best practices you are looking for and make this part of the scope of work.
- Don't underestimate the need for change management. Whether moving from spreadsheets to a server-based system or implementing optimization capabilities, getting people to embrace change is critical.

## Market Overview

Market requirements have remained relatively constant over the last 5 years. However, we note some signs of imminent change, including the following market trends:

- More solution options exist than ever before. In this report, we have evaluated a total of 25 vendor solutions. We continue to see more "localized" solutions that focus on specific geographies such as Europe or North America. We have not seen any consolidation among vendors in the last year, which is largely a good thing for users of these solutions because of the tendency to force adoption due to sunsetting of technologies or merging of platforms.
- Deeper analytics, better user experience, and capabilities for optimizing promotions through predictive models are key differentiators that are highly sought after. We consistently see this in case studies of success.

*Deeper analytics, better user experience, and capabilities for optimizing promotions through predictive models are key differentiators that are highly sought after.*

- Post event analysis has often manifested itself as an overlooked afterthought when considering the entire trade promotion cycle. However, we have seen this addressed more and more recently as either something requiring a specialty tool or as having higher weight in the selection process. We have seen a 6 percentage point improvement in this measure based on the most recent survey. We believe this has resulted from a combination of better scrutiny during the selection process and solution upgrades where better post event analytics are offered. This improvement has occurred despite the persistent headwind of acquiring clean data.

## Evaluation Criteria

The Promotion Optimization Institute recommends using these ratings to narrow down your options. Geography is the first place to start. If you operate in a specific set of geographies, narrow your search based on those and then determine whether you seek TPM, TPO, or both. This will further narrow your search. Additional criteria could include how much of a differentiated product you seek. If this is high, then give more weight to companies with better company vision. Conversely, if you wish to be overly conservative, then place more emphasis on those with higher company viability. Continue to rank and weigh the criteria based on what is most important to you. This will help to make the selection process more objective as well as help you deal with the complexity of having to look at multiple options.

## Company Assessment

### Company Viability

Viability includes an assessment of the organization's overall health, so far as we are able to ascertain it. Most of the companies we feature in this Panorama will not disclose financial data to us or are not able to do so because of how their business units are aggregated and reported. Where possible, we look at changes in headcount, investment in the product, deal flow, visibility in the marketplace, and stability of management. Ultimately what we look for is the financial and practical success of the business unit and the likelihood that the individual business unit will continue investing in the product, will continue offering the product, and will advance the state of the art within the organization's portfolio of products. A vendor must be able to generate sustainable momentum and be committed to continued success in the specific TPx marketplace where it has chosen to compete. However, we are forced to make our determination based on all available data in the absence of disclosed financials. Therefore, we recommend that you perform your own financial due diligence as part of vendor selection.

### Geographic Strategy

This is the vendor's strategy to direct resources, skills, and offerings to meet the specific needs of the geographies that it is targeting directly, or through partners, channels, and subsidiaries, as appropriate for that geography and market. This also covers a vendor's ability to support these companies in targeted geographies and in targeted languages, as well as the vendor having the quantity and quality of clients available to provide references from targeted tiers of consumer goods companies.

Tier 1 companies have revenue greater than $1 billion. Tier 2 companies have revenue of between $250 million and $1 billion. The revenue of Tier 3 companies is less than $250 million. The application of our tiers can occur at the corporate level for global deployments or at the region/country level. This is because Tier 1 companies don't necessarily act as such when selecting and deploying solutions at the micro-level, or for a business segment that is relatively small, compared to the overall organization.

### Market Responsiveness and Track Record

This is the ability to respond, change direction, be flexible, and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This criterion also considers the vendor's history of responsiveness.

### Deployment Capabilities

This is a vendor's demonstrated ability to deliver trade promotion management solutions for consumer goods companies through its own implementation or with the help of external service partners, as may be required by its clients.

### Market Understanding

This refers to the ability of the vendor to understand buyers' wants and needs, and to translate them into products and services. Vendors that show the highest degree of vision listen to and understand buyers' needs and desires, and can shape or enhance those with their added vision. This also means having an in-depth understanding of the consumer goods industry and the needs of companies in this market segment, coupled with the ability to act in time to remain relevant, translate this market understanding into comprehensive functionality, and meet customer needs within its geographic scope, worldwide.

*Vendors that show the highest degree of vision listen to and understand buyers' needs and desires, and can shape or enhance those with their added vision.*

### Vertical/Industry Strategy

This is the vendor's approach to product development and delivery, recognizing the unique requirements of the geographies and types of consumer goods companies that it serves. Examples of customers include manufacturers from food and beverage, to tobacco, to hard lines, to footwear and apparel. Other examples include fully covering the functional footprint within the geography where the vendor operates. This is not to say that a vendor needs to cover the globe, but must accommodate variations within its targeted geographies. The vendor's strategy must include directing resources, skills, and offerings to meet the specific needs of individual market segments, including vertical markets. Thus, we do not penalize a vendor in the ratings if it is localized, nor do we reward a vendor merely because it is more global. Most important is its proven ability to deliver against its target market.

### Partner Leverage

This is the demonstrated ability to form and execute meaningful partnering relationships across the breath of the offering. Such additions to the product offering are embedded, typically transparent to users, and included in a single contract. Examples include underlying technology, hosting, analytics and data visualization, predictive models, and hardware. Not included in this category is the delivery of deployment services.

### Company Vision

This is the ability to attract and retain personnel that will keep the company relevant and growing. It is also the ability to articulate and deliver against a vision of where the TPx space is going in the two-to-five-year time horizon and beyond for its targeted geographies and tiers of customers.

## Product Assessment

### Product Aptness and Flexibility

This is the vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology, and feature sets as they map to current and future requirements. This also includes web and mobile technology that is scalable and can support internal sales personnel, as well as partner sales agents. The data model can support appropriate hierarchies of customers and products (e.g., product family, brand, and SKUs). The product also supports appropriate platforms, such as laptops, tablet devices, and relevant forms of handheld devices. The vendor's technology can be expanded to integrate with other company legacy solutions, best-of-breed offerings, or syndicated data sources. These criteria also include important enablers, such as content management, contract management, reporting and analysis, and online/offline capabilities as required.

### Delivery Flexibility

This is the vendor's ability to provide its solutions in multiple fashions: on-premises, third-party hosted, cloud and SaaS.

### TPM Functionality

The vendor offering TPx must enable five key customer-planning functions, with a complete solution that meets market requirements for each function:

- Strategic and account planning.
- Promotion planning and budgeting.
- Simulation of financials and other KPIs for both manufacturer and retailer.
- Promotion execution and monitoring.
- Settlement.
- Post event analysis.

This analysis does not cover vendors that specialize in enabling any one of the above, but as a more complete approach to managing trade promotions.

*The ability to articulate and deliver against a vision of where the TPx space is going in the two-to-five-year time horizon and beyond for its targeted geographies and tiers of customers.*

### TPO Completeness

The vendor offering TPO must have the ability to predict promotional outcomes with:

- Constraint-based optimization.
- Optimization through iterative scenarios.
- "Best" promotion option.
- Multiple promotional factors, including timing, frequency, duration, pricing, promotion type, and other capabilities specified by users.
- Cannibalization and halo effects.

### User Experience

This includes UI, navigation, and ergonomics for moving throughout the promotional cycle.

### Analytical Capabilities

Analytical capabilities involve:

- **Graphics** — Integration of graphical representations and the ability to obtain additional information through hovers or drilldowns.
- **Dashboards/KPIs** — User-configurable lenses that enable the monitoring of multiple dimensions of the business and provide access to insights.
- **Alerts** — The ability to specify conditions that will result in a notification through the TPx system, email, or text message.
- **Reporting** — Predefined reports or embedded report writers.
- **Query** — Embedded technologies such as online analytical processing (OLAP) to enable data analysis; ability to export to Microsoft Excel, manipulate the data, and bring the results back into the application.
- **Artificial Intelligence** — This is an advanced set of capabilities that can learn, predict, and surprise you with answers to questions you haven't thought to ask or insights you haven't asked for. Where business intelligence allows you to drill into questions based on some hypothesis or anomaly, AI does not require the "ask." These capabilities are far from mainstream, but are beginning to enter the trade promotion cycle, so it is time that we call them out.

Such analytics provide insights about the aspect(s) of the promotional cycle and we only rate them as to their ability to provide these insights into areas outlined under TPM and TPO Functionality above. Ergo, there are many powerful analytical tools on the market, but we only look at those that are embedded in TPx and shed light on its processes.

### Product Vision

This is the ability to articulate future product needs and have them included in the product when early adopters in the market are prepared to embrace them.

### Configurability

This is the ability to accommodate nuances at various user levels, without having to write code. Special consideration is given to solutions that allow nontechnical personnel to manage various levels of configuration, without involving the vendor and where individual users can configure their own solution, based on how they like to work or view information.

## Promotion Optimization Institute Best-in-Class Distinctions

Within the functional set described above, we believe there are a set of significant differentiators that merit mention as a group. We have touched on some of them already, but as we work to strengthen this market by encouraging their adoption, we wish to highlight the following vendors as being "Promotion Optimization Institute Best-in-Class."

### POI Best-in-Class Recipients

| Functional area | Recipient(s) | Why critical to TPx? |
|---|---|---|
| Mobile UX | Accenture, Comarch | Ability to tweak, monitor, or perform minor functions on the go. |
| Desktop UX | Klee, Periscope, Sequoya | Drives engagement from users and reduces drudgery. |
| HQ Analytics/Insight | Data Ventures, Nielsen, Periscope, Sequoya, TABS | Insight is the currency of collaboration and a primary differentiator. |
| Field Analytics/ Insight | AFS, Exceedra, SAP, T-Pro | |
| Financial Orientation/ simulation | RI, SAP, visualFabriq | Accountability and ROI generation. |
| Post Event Analytics | visualFabriq, SAP (through embedded Strategy& capabilities) | Need to know the outcome but without a lot of manual work. |
| Collaboration:<br>• Internal<br>• External | <br>Acumen, Upclear<br>Adesso, Periscope, Sequoya | More engagement to leverage enterprise expertise.<br>More buy-in from channel partner(s) through engagement. |
| Analytics Visualization | Kantar Retail, TABS | A good graphic or image says it all. |
| Dashboard | Accenture, TABS | This pulls all the graphical elements together to be able to easily see the status of the business in a single place. It is also the launch point for further drill down. |
| TPO Ergonomics | Kantar Retail, T-Pro | TPO can be complex with all the constraints and simulation. It has to be made easy. |
| Calendar | SAP, WPAS | This is a focal point of the plan. It has to be visual, informative and easy to change. |
| Remote Promotion Monitoring | RI | Need to be able to remotely monitor the promotion in flight as a dashboard element in TPx. |
| S&OP Capabilities | Blueshift, Exceedra | Collaborating with trading partners to make TPx a more outwardly focused exercise. |

We are pleased to highlight these distinctions to draw attention to how critical these capabilities are; both to CG manufacturers and solution providers. However, we caution users against assuming that "Best-in-Class" is automatically the best fit for them. In a world of good-better-best, "good" may be good enough, but it is always instructive to know what "best" has to offer in order to evaluate how it can create a competitive advantage by improving all aspects of the trade promotion cycle.

## Vendor Assessments

Figures 1 through 6 are company and product assessments for the vendors covered in this research. Note that the ratings do not comprise a normal distribution (i.e. an equal number of Above Average and Below Average ratings) because there are many solutions in the marketplace that are not included for various reasons. Hence, ratings are absolute versus the market, and not relative versus other vendors featured in this report. The source for all figures is POI's primary analysis conducted in 2016.

**Figures 1 – 3: Company Assessments**

**Company Assessment**

| Vendor/Category | Company Viability | Geographic Strategy | Responsiveness & Track Record | Deployment Capabilities | Market Understanding | Vertical/Industry Strategy | Partner Leverage | Company Vision |
|---|---|---|---|---|---|---|---|---|
| Accenture | ● | ● | ◐ | ● | ● | ● | ● | ◐ |
| Acumen | ◐ | ○ | New | ○ | ● | ◐ | ◐ | ◐ |
| Adesso | ● | ● | ◐ | ◐ | ● | ● | ● | ◐ |
| AFS Technologies | ◐ | ◐ | ● | ● | ● | ● | ◐ | ● |
| Blue Shift | ◐ | ○ | ● | ◐ | ● | ● | ● | ◐ |
| Comarch | ● | ● | ○ | ● | ○ | ◐ | ● | ○ |
| CPG Tool Box | ◐ | ◐ | ◐ | ◐ | ● | ◐ | ○ | ◐ |
| Data Ventures | ◐ | ◐ | ○ | ● | ● | ● | ○ | ● |

● = Above average ◐ = Average ○ = Below average

## Company Assessment

| Vendor/Category | Company Viability | Geographic Strategy | Responsiveness & Track Record | Deployment Capabilities | Market Understanding | Vertical/Industry Strategy | Partner Leverage | Company Vision |
|---|---|---|---|---|---|---|---|---|
| Effect Makers | ○ | ● | New | ◐ | ● | ● | ○ | ◐ |
| Exceedra | ● | ● | ● | ● | ● | ● | ◐ | ◐ |
| Flintfox | ● | ● | ◐ | ● | ● | ● | ○ | ◐ |
| ITC Infotech | ○ | ● | ○ | ● | ○ | ● | ◐ | ○ |
| Kantar Retail XTEL | ● | ● | ● | ● | ● | ◐ | ◐ | ● |
| Klee Commerce | ● | ○ | ○ | ◐ | ● | ◐ | ○ | ● |
| Nielsen | ◐ | ● | ◐ | ● | ◐ | ● | ● | ● |
| Oracle | ● | ● | ◐ | ● | ● | ● | ◐ | ◐ |

● = Above average ◐ = Average ○ = Below average

## Company Assessment

| Vendor/Category | Company Viability | Geographic Strategy | Responsiveness & Track Record | Deployment Capabilities | Market Understanding | Vertical/Industry Strategy | Partner Leverage | Company Vision |
|---|---|---|---|---|---|---|---|---|
| Periscope | ● | ● | ● | ● | ● | ● | ● | ● |
| RI | ◐ | ◐ | ● | ◐ | ● | ◐ | ○ | ● |
| SAP | ● | ● | ● | ● | ● | ◐ | ● | ● |
| Sequoya | ◐ | ● | ● | ● | ● | ● | ○ | ◐ |
| TABS Analytics | ◐ | ◐ | ◐ | ◐ | ● | ● | ○ | ● |
| T-Pro Solutions | ◐ | ◐ | ● | ◐ | ● | ● | ○ | ● |
| UpClear | ● | ● | ● | ◐ | ● | ● | ● | ◐ |
| visualFabriq | ◐ | ● | ● | ● | ● | ● | ○ | ● |
| WPAS | ● | ● | ◐ | ● | ◐ | ● | ● | ◐ |

● = Above average ◐ = Average ○ = Below average

**Figures 4 – 6: Product Assessments**

## Product Assessment

| Vendor/Category | Product Aptness & Flexibility | Delivery Flexibility | TPM Functionality | TPO Completeness | User Experience | Analytical Capabilities | Product Vision | Configurability |
|---|---|---|---|---|---|---|---|---|
| Accenture CAS | ● | ● | ● | ● | ● | ● | ◐ | ● |
| Acumen | ○ | ◐ | ◐ | None | ○ | ● | ○ | ○ |
| Adesso Solutions | ● | ○ | ● | None | ◐ | ● | ◐ | ◐ |
| AFS Technologies | ● | ◐ | ● | ● | ● | ● | ● | ◐ |
| Blue Shift | ◐ | ● | ● | ◐ | ◐ | ● | ● | ● |
| Comarch | ◐ | ◐ | ● | None | ◐ | ● | ○ | ● |
| CPG Tool Box | ● | ○ | ● | None | ◐ | ◐ | ◐ | ● |
| Data Ventures | ● | ◐ | ◐ | ◐ | ◐ | ● | ● | ● |

● = Above average ◐ = Average ○ = Below average

## Product Assessment

| Vendor/Category | Product Aptness & Flexibility | Delivery Flexibility | TPM Functionality | TPO Completeness | User Experience | Analytical Capabilities | Product Vision | Configurability |
|---|---|---|---|---|---|---|---|---|
| Effect Makers | ● | ◐ | ● | None | ○ | ○ | ○ | ◐ |
| Exceedra | ● | ● | ● | ◐ | ● | ● | ◐ | ● |
| Flintfox | ◐ | ● | ● | None | ○ | ● | ● | ● |
| ITC Infotech | ● | ● | ● | ◐ | ◐ | ● | ○ | ● |
| Kantar Retail XTEL | ● | ◐ | ● | ● | ● | ● | ● | ● |
| Klee Commerce | ● | ● | ● | None | ● | ● | ◐ | ● |
| Nielsen | ◐ | ○ | ◐ | ● | ◐ | ● | ● | ◐ |
| Oracle | ● | ● | ● | ● | ● | ● | ◐ | ● |

● = Above average ◐ = Average ○ = Below average

## Product Assessment

| Vendor/Category | Product Aptness & Flexibility | Delivery Flexibility | TPM Functionality | TPO Completeness | User Experience | Analytical Capabilities | Product Vision | Configurability |
|---|---|---|---|---|---|---|---|---|
| Periscope | ● | ● | ◐ | ● | ● | ● | ● | ● |
| RI | ● | ○ | ● | None | ● | ● | ● | ◐ |
| SAP | ● | ◐ | ● | ● | ● | ● | ● | ◐ |
| Sequoya | ● | ◐ | NA | ● | ● | ● | ● | ● |
| TABS Analytics | ● | ◐ | NA | ● | ● | ● | ● | ● |
| T-Pro Solutions | ● | ● | ◐ | ● | ● | ● | ● | ● |
| UpClear | ● | ○ | ● | Integrated Partner | ● | ● | ◐ | ● |
| visualFabriq | ● | ○ | ● | ● | ● | ● | ● | ◐ |
| WPAS | ● | ● | ● | ● | ● | ● | ◐ | ◐ |

● = Above average ◐ = Average ○ = Below average

## Analysis of Representative Vendors

**Accenture CAS and Accenture Cloud TPM** accenture.com/cpgsolutions

**Profile:** Part of Accenture through the acquisition of CAS, a 30-year veteran in the TPx space and one of the first to provide TPM and TPO in a single offering.

**Geographic presence:** North America (70%), Latin America (7%), Europe (18%), Asia/Pacific (5%).

**Total consumer goods users (seats):** 15,330.

**Tiers represented:** Tiers 1 and 2.

**Solution offerings:** TPM, TPO, and support services.

**Major product sub-segments not covered:** Semi-durables (footwear, apparel, furnishings, etc.) and consumer durables (consumer electronics, etc.).

**Analytics:** The on-premises solution has deep analytics and renders the data very well. It is arguably one of the best dashboards and data rendering that we have reviewed. The KAM cockpit is very web-like in orientation (as opposed to grid-like) with an excellent landing page. The Mobile KAM is form factored for iOS and Android devices. It favors managers and people wanting to access promotions on the go, but not necessarily create them. We rate the on-premises solution as Above Average.

The Accenture Cloud TPM version does not include pre-package analytics, but relies on underlying Salesforce capabilities for reports and dashboards through configuration. Development still continues on the cloud product to bring it on par with on-premises and this will continue well into

2018. It does have an exceptional business scorecard with smart tiles that provide both navigation and KPIs. However, the cloud product will still need to have reports and analytical views built out over time as part of deployment or thereafter. Therefore, what we saw of analytics in the cloud product was high quality, but still lacks depth. We rate it Below Average. We do note that the access to Wave analytics for AI and machine learning offer tremendous potential going forward and hope to see those capabilities in the cloud product in coming years.

**Technology architecture/delivery options:** On-premises and cloud as SaaS.

**Configuration/Customization:** The solutions are highly configurable and offer customization for the on-premises solution if desired. Modules can be enabled or disabled using configuration tools as well as adapted at the business process level.

The Accenture Cloud TPM offering utilizes the open APIs in Salesforce.com to enable client-specific customizations. Since the core Salesforce.com application is not impacted by customization there will be no impediment to upgrading. Thus, the Accenture Cloud TPM offering offers both configuration and customization.

**Service partners that have deployed in the past:** Accenture, Strategy&, and Rural Source, Inc. in North America.

**Service partners that are able to deploy but have not yet done so:** 4Brands Reply in Europe.

**Technology partners:** Salesforce.com for technology and hosting and Microsoft for underlying technology and hosting. Also, the Fraunhofer Institute and several universities around the globe.

**User experience:** Accenture CAS has consistently had an excellent user experience and pushed the limits of what can be done in a TPx tool. The charter customer on the Accenture Cloud TPM product continues to push them to ensure that it is at least on par with on-premises. This shows in the quality of the product, but has slowed down development. As such, capabilities such as payments and accruals have been pushed into 2018. What we saw had some excellent usability features such as planning based on attributes instead of complex hierarchies and smart KPIs based on what the user happens to be doing at the moment or KPIs that the individual user can specify. Overall, the cloud UX is strong, smart, and ergonomic in how it renders on the screen. We rate it Above Average.

For the on-premises product, it continues to see the benefits of development efforts around HTML5 to take the place of Silverlight. It is very much “anti-spreadsheet” in that it renders more like a web-page and much less like a spreadsheet than most solutions. The product will be supported into the foreseeable future; and, given several major on-premises deals signed in 2017, we do not expect that the on-premises offering will fall behind in the least bit. Highlights include intuitive calendaring, ergonomic creation of promotions, and performing optimization with a minimum of screens. We rate the on-premises solution Above Average for UX.

**Vendor trend:** Accenture has gotten renewed interest in the marketplace based on being able to provide both cloud and on-premises solutions. In fact, we have seen more traction for the on-premises product than in the past couple of years. It still offers a managed services approach, which is beneficial in recent years of hiring freezes and movement away from growth in internal IT budgets to support applications. Nevertheless, uptake in the cloud product has been slow and focused on a charter client that is helping to prioritize development. The two-pronged approach of offering both cloud and on-premise should be very attractive, but we find that Accenture still does not get its fair share of new deals compared to major, global rivals. Some of this is attributable to its focus and price TCO being

more suitable for Tier 1 and larger Tier 2 companies despite the notion that multitenant SaaS should appeal to Tier 3. Accenture has to find a way to position its offerings and deployments options as lower in cost to garner a greater share of the market.

**Strengths:** The Accenture network and depth of global expertise is vast and can help with best practices in most geographies. The user experience is exceptional across the board. There is also the provision for various approaches to predictive modeling from Bayesian to machine learning that give users more options. New functionality around supporting annual customer meetings and joint planning with more of a view to the retailer's business is a plus, as is the ability to look at cross-retailer cannibalization.

Also, the product development process is amazingly disciplined based on how it secures client input, conducts usability studies, and leverages external usability experts. The breadth of the vision is also noteworthy as it extends well beyond the relationship with retailers to include interaction between consumers and the promotion as part of a true omni-channel approach.

**Challenges:** The biggest challenge lies in the narrow scope of target companies and the fact that many have chosen competitors for TPx while Accenture has been launching its cloud offering and moving on-premise away from Silverlight. This effectively locks Accenture out of these companies for at least 4 years until they might re-visit their TPx decision. Analytics and settlement are currently not offered in the core product, but must be added as a consulting engagement. Some prospects will find that they can purchase and deploy other modules, but others will want to see the whole solution as an out-of-the-box offering. Securing a broad partner network for deployment has been a challenge since Accenture purchased CAS in 2011. Accenture has deep experience but there are always situations where other options are sought.

**Adjacent offerings:** POS data management, data-cleansing services, food service, shelf management/visualization, retail execution and monitoring, digital merchandising, Intelligent Revenue Growth Management (iRGM)

**Key differentiators:** The ability to deliver a complete solution and service from initial situation assessment through to deployment and training. It also embodies the combination of deep functionality, high usability, and strong analytics. Thus, it is one of the most complete solutions on the market, speaking of the solutions as a whole and not individually. We are also seeing a resurgence of off-line capabilities and believe that they are well-suited for some collaborative activities that might take place in a buyer's office where there is no internet connectivity. Accenture is one of the very few vendors to offer this. Finally, a key differentiator going forward will be the ability to combine Accenture expertise with the depth of the Salesforce technology and platform. It is a combination that nobody else can replicate.

**Outlook & prognosis:** Uptake on the cloud solution has been slow, given just one charter client after 2+ years following the announcement to architect it on Salesforce. We don't see this changing dramatically because too many Tier 1 and larger Tier 2 companies have already chosen their TPx future. However, given the strong usability and underlying industry expertise of the broader organization, it will be a viable option for organizations that are willing to pay more to get an integrated TPM/TPO offering with the option to expand into omni-channel and beyond. We don't see it becoming the market leader in terms of seats because of the focus on larger Tiers. But we do see is as a leader in usability and analytical depth.

**Consider Accenture when:** You seek global capabilities for proven solutions that have global reach, but local expertise, and also when you seek a superior user experience. But be sure that your desires for a cloud solution align with the platforming plans based on which functionalities you require and when. Also, if you seek to blend a combination of on-premises

and cloud around the world based on market requirements and without sacrificing usability and analytical strength.

**Avoid Accenture if:** You seek an experienced global deployment partner other than Accenture or Strategy&. Also, if you really just want an inexpensive step-up-from-spreadsheets solution for TPM requirements such as for basic needs such as planning and funds management. Also if you specifically want a complete cloud-based offering before the expected completion date of May, 2018.

**Distinctions:** POI Best-in-Class for Mobile UX and Dashboard.

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**Acumen Commercial Insights Ltd** acumenci.com

**Profile:** A UK-based firm combining consulting services, outsourcing of key business processes, and TPx software for the last 10 years. This is our first time covering Acumen in the Panorama.

**Geographic presence:** North America (1%), Latin America (4%), Europe (65%), AsiaPac (30%).

**Total consumer goods users (seats):** 1,100.

**Tiers represented:** All.

**Solution offerings:** TPx, implementation and support services.

**Major product sub-segments not covered:** Tobacco, household products, Semi-durables (footwear, apparel, furnishings, etc.) and consumer durables (consumer electronics, appliances, etc.).

**Analytics:** Because of its relatively small user-base, Acumen has been responsive to fewer, deeper requests for analytical capabilities. It has a nice ability to drill to the KPIs, financial simulation through sliders (like for increasing depth of discount), and comparative customer/supplier P&Ls. A series of standard reports are available through a "picker." You can pick a report, alter it to your needs, and re-publish it. However, this is typically done by Acumen. The client specifies the layout and it is built to suit. Plotting historical promotions in a matrix and filtering them, then drilling in for specifics, is refreshing when compared to massive spreadsheet grids of promotions. Scenarios range from an individual promotion by product to the total business for looking at the impact of a price increase. We found that the analytics had some insightful views and rendered well. We rate it Above Average.

**Technology architecture/delivery options:** On-premises and cloud as SaaS through Microsoft Azure

**Configuration/Customization:** It is configurable, but customization that would take a client out of the upgrade path is not an option. Client requests are evaluated and considered for inclusion in the roadmap.

**Service partners that have deployed in the past:** Acumen does all of its own deployments.

**Service partners that are able to deploy but have not yet done so:** Not applicable.

**Technology partners:** Microsoft, Microsoft Azure, Telerik, RippleRock, Nfocus, Mongo, HeadforCloud, CN Group, Vitamin C Ltd., PostMan, GuRock, JetBrains & Octopus Deploy.

**User experience:** The solution is very grid-like and does not utilize the screen space well. In some cases the fonts are small and hard to read. The calendar view renders average. It has the ability to color code the events in the calendar based on profit, which we found to be unique. It has nice, detailed hovers. We liked the stepwise workflows that guide the user through the process. It is not very graphically oriented. Overall, we rate it Below Average.

**Vendor trend:** As this is our first time featuring Acumen in the Panorama, we don't have much perspective on its trends. It is acquiring new clients, increasing staff, and enjoys high client retention.

**Strengths:** We find Acumen to be interesting in the marketplace because of its ability to provide consulting, implementation, ongoing support services, and software from a single source. This is highly desirable for a company seeking TPx but having difficulty moving off of spreadsheets. We also find the "concierge" model around creating reports, cleansing and managing downstream data, and providing analytical services to be appealing to companies that prefer a high touch model. The solution also has a strong financial orientation.

**Challenges:** We don't see Acumen facing significant challenges beyond the dynamics of supporting a client base in multiple geographies with a high touch model out of just a U.K. office. It is a boutique company that is content to be focused on providing broad services to clients looking for same. It faces less competition in Europe than a similar firm would face in another major market like the U.S.

**Adjacent offerings:** POS data management and data cleansing, demand planning,

**Key differentiators:** In addition to the combination of product and services from start-up through maturity already mentioned, we found that the solution has an extraordinary ability to capture tribal wisdom by annotating objectives, variances, learnings, and general comments throughout the system. In the computer age such things are often eschewed because they aren't quantifiable or easily searchable. However, we find that capturing the "why" behind a result or a change to an entry is very important to help managers understand the rationale as well to help someone taking over an account relationship due to turnover. Perhaps more important is the ability to capture insights with commentary. We wish that other vendors would follow suit.

We also found the "nearest neighbor" proxying capability to be very unique. It can grab a similar promotion that has previously run as a proxy for an outcome if not enough data is available for the machine learning to actually determine an outcome.

**Outlook & prognosis:** Acumen will remain a boutique company that caters to companies desiring services and solutions in a high touch model. It will offer this option globally but remain relatively small and focused.

**Consider Acumen when:** You need help getting started on the TPx journey, want to augment your staff with a capable partner, or want to exert more influence on the direction of the product than you could if you were one of a large number of user organizations. Also, if you want to tailor a support and services package that is just right for you. Acumen is more oriented to being a consulting and services firm first and TPx solution provider second.

**Avoid Acumen if:** You simply want a TPx solution that you can maintain and control internally. Also, if you are looking to engage users more through UX than ability to gain insights from it.

**Distinctions:** POI Best-in-Class for Internal Collaboration.

**Adesso Solutions** adessosolutions.com

**Profile:** TPM provider focused on North America through trade effectiveness and best practice sharing in addition to software.

**Geographic presence:** North America (100%).

**Total consumer goods users (seats):** Approximately 6,000. Enterprise-based licensing model does not lend itself to counting individual users.

**Tiers represented:** Some Tier 1, but the focus is on Tiers 2 and 3.

**Solution offerings:** TPM and related analytics.

**Major product sub-segments not covered:** Semi-durables.

**Analytics:** The addition of dashboards is a real plus and they are quite nice. We found that investment and focus on SMB analytical issues such as UNFI and KeHE deductions, accounting for indirect customers, and accommodating food service sales through a single solution have improved the offering. We would characterize the analytics as insightful and succinct. In particular, we like the ease of planning at various levels and, through configuration at the user group level, the updated dashboard to better monitor the business. Having multiple customers on a single calendar is good for avoiding overlapping promotions. Given the Excel orientation of the tool, it is appropriate that it include pivot tables. A report writer is also included. We rate it as Above Average.

**Configuration/Customization:** Fully configurable with an enhancement request program that leads to prioritization and possible upgrades across the platform. Users then have the option of whether or not to deploy the new feature. Ability to customize and create a unique instance is not an option.

**Technology architecture/delivery options:** Hosted, multi-tenant SaaS in a private cloud.

**Service partners:** Adesso does its own deployments. It also has a relationship with FMT Consultants, LLC for SAP integration.

**Technology partners:** Microsoft, Dell, Telerik for internal controls and dashboarding, and On-line Tech.

**User experience:** The UX has and will continue to see enhancements based on the current roadmap. We find it to be intuitive and easy to use. It is functional but never fancy with a complete system that has everything you need and nothing that you don't. The ability to instant message peers from within the system is a real plus for harnessing the power of the enterprise. For usability, we rate it as Above Average. For graphics and how it renders data, we rate it as Average. Users who favor the look and feel of Excel will feel right at home with this tool.

**Vendor trend: Adesso has seen increased investment to improve UX and continues to expand as a** TPM-only solution focused solely on the North American market, adding feature/function capabilities to improve the promotion management process. It has found an interesting and underserved market in the natural foods segment that its approach and capabilities are well suited for. It is a relatively low cost solution and has become more focused on SMB tier needs and shortcomings. Client upgrade activity continues to be strong as a sign of satisfaction and commitment.

**Strengths: The approach of staffing with industry, as opposed to technology, professionals can help those that are early in the** TPM journey. To this end, it has an assessment process that is a very light consulting engagement, the result of which is an objective view of TPM readiness. What is rather unique is that the assessment may actually indicate that a company is not ready to launch into a TPM system deployment. We find few TPx companies that actually have the candor to recommend waiting as opposed to closing the deal. We also like the way the company seeks to facilitate interactions between user organizations at its own seminars or other events to facilitate best practice transfer.

Additional strengths include:

- Deep industry expertise and knowledge of the North American market.
- A revenue-based pricing structure that better facilitates working with brokers/sales agents as opposed to tracking user seats.
- Unique ability to integrate with Quickbooks to accommodate those clients.

**Challenges:** The Adesso challenge is shared with those vendors focused on Tiers 2 and 3, specifically the perception that a TPM solution is too expensive or too complex for their organization. Thus, Adesso has to convince prospects that they need TPM and then advance a sales process with them. This is particularly prevalent in the natural-specialty foods segment. They are working to address this through networking events that allow clients and prospects to share best practices. Nevertheless, many Tier 3 companies continue to be slow in adopting TPM.

**Adjacent offerings:** Food service capabilities within the same solution.

**Key differentiators:** The "Off-line Planner" is an advanced Microsoft Excel add-in, which allows the user to build a plan in a more familiar Excel-like format and then integrate it into the system when it is final. This allows for off-line work without having to re-key data. Also, the ability to create custom aggregates or groupings for a legal entity is useful for facilitating top-to-top meetings. The analytical expertise around the UNFI/KeHE deductions and SPINS data are solid differentiators. Outlook calendar integration is also quite unique for providing alerts about the status of a promotion or need to clear a deduction. Also, the workflow can send a spreadsheet with a short list of deals that need to be approved, or just a link that takes the recipient directly to the system.

**Outlook & prognosis:** The movement into natural foods is interesting because there are so many of them and they are typically small and not terribly sophisticated compared to mega-brands. They also tend to be a cohesive group that is willing to share best practices because their categories are so diverse that they seldom are competitors. Adesso has a single financial backer with a long-term perspective that can see Adesso work more deeply into tier 2, particularly tier 3, and especially the natural foods specialty niche. This will help it to continue acquiring industry experts who can assist the many companies currently using spreadsheets to make the transition.

**Evaluate Adesso when:** You are a Tier 2 or 3 company that wants a complete TPM solution that is a good value for the money. Also, if you are just embarking on the TPM journey and seek expertise or support services as well as a solution to make the transition to server-based TPM. Finally, if you value function over form and want to be part of a collaborative user ecosystem and possibly want to outsource some systems administration functions.

**Avoid Adesso if:** You have words such as "global," "optimization," or "customize to our requirements" in your TPx charter. Also, if you are looking for an on-premises solution to customize and really make it your own.

**Distinctions:** POI Best-in-Class for External Collaboration.

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**AFS Technologies** afsi.com

**Profile:** AFS has grown from its legacy in the food service industry to an end-to-end consumer goods platform that includes ERP, analytics, retail execution and monitoring, and TPx through the acquisition of the former MEI and Synectics Group.

**Geographic presence:** North America (92%), Latin America (2%), and Europe (6%).

**Total consumer goods users (seats):** 24,455.

**Tiers represented:** Tier 2 and 3.

**Solution offerings:** TPM, TPO, and analytics.

**Major product sub-segments not covered:** Consumer durables and semi-durables, tobacco.

**Analytics:** The addition of exception-based reporting that includes recommendations about what action should be taken takes AFS to a new analytical level. We also like the new ability to create and push specific reports to specific people or groups based on a predetermined schedule. Also, the ability to get optimization through T-Pro Solutions with a single sign-on. Overall analytical capabilities are based on Microsoft's analytical stack and offer more access to insights. The executive dashboard, AFS G2, can also be purchased as an add-on. A very nice wizard helps with report creation and is drag-and-drop, which is a strong feature. The same approach is used for integrating external data. Data can also be downloaded to Excel for analysis. One insightful feature is the ability to understand what trade spending is at any point in time. We rate the overall analytical abilities as Above Average. It could be a bit more graphically oriented, but is still both powerful and insightful.

**Configuration/Customization:** It is a multi-tenant solution. Client specific functionality can be developed and turned on, but only if it does not impede the upgrade path.

**Technology architecture/delivery options:** SaaS through private cloud.

**Service partners:** Alvarez and Marshal. However, AFS does most of its own implementations.

**Technology partners:** Microsoft Azure and Rackspace for hosting. T-Pro Solutions for TPO.

**User experience:** Continues to evolve. We like the tile-based landing page. Putting some data or graphics into each one to make them "smart" would be a great enhancement. The calendar hovers are very nice and clean. We like the "string of pearls" approach to stepwise navigation through the process. The on-line contextual help screens are a real plus. Also, the ability to auto-match deductions. We rate it Above Average.

**Vendor trend:** Overall trend continues to be positive. The company is investing in the TPx product and partnering for capabilities like TPO. Client retention is strong and senior leadership is stable. It also showed flexibility and focus when it realized that partnering with Nielsen for TPO was not going to work out. Rather than drag is out, AFS quickly integrated with T-Pro and moved on.

**Strengths:** An end-to-end set of offerings from ERP, to business intelligence (BI), to TPx, to retail execution. Also, deep industry experience since the vast majority of clients are in the consumer goods industry. Particularly noteworthy is that the solution is very well-rounded. There just aren't any significant deficiencies. Some vendors with Best-in-Class distinctions in some areas also have glaring deficiencies in others. AFS is among a few vendors that are solid across the entire TPx spectrum.

**Challenges:** The product is well suited to the target market. However, some prospects may prefer more third party implementation partner options. This will need to be addressed as AFS seeks to expand its TPM offering outside of North America.

**Adjacent offerings:** Food service, rebate management, ERP, warehouse management, BI, and retail execution.

**Key differentiators:** One of few providers offering TPO to tier 2 and 3 companies. Also, one of the few vendors offering best-of-breed retail execution as well as TPx. Adding machine learning to the business process with recommendations puts it well ahead of competitors.

**Outlook & prognosis:** We expect continued momentum in the tier 2 and 3 market, which is still very attractive and out of reach for many of the large, enterprise players. Also, putting the solution on the Microsoft AppSource on a "try before you buy" basis will reduce perceived risk and increases interest for prospective buyers.

**Evaluate AFS when:** You are a tier 2 or 3 CG company looking for help on the trade promotion journey with the possibility to move to TPO that is very real as opposed to some PowerPoint charts. Also, if your see the value of having an integrated TPx/retail execution solution.

**Avoid AFS if:** You want your own customized solution or a global solution with both technology and service aspects.

**Distinction:** POI Best-in-Class for Field Analytics/Insight.

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**Blueshift** blueshift.one

**Profile:** An Australian vendor coming at the TPx space from integrated business planning, which includes demand planning as well as TPx. It is steadily making its way into Asia. The majority of its users have TPO as well as TPM.

**Geographic presence:** Asia/Pacific (100%).

**Total consumer goods users (seats):** About 1,200; 700 of which use both TPM and TPO.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco, household products, semi-durables, durables.

**Analytics:** The important enhancement has been the changing of the architecture to Microservices/MemSQL to significantly accelerate performance to real-time on large data sets. This sets the foundation for more functional improvements across the platform. Of particular note is the strong orientation towards financial measures and a built-in OLAP cube.

There are many pre-built views to highlight the business in insightful ways. In particular, we liked the P&L waterfall chart. Optimization utilizes Bayesian calculations and requires iterative trials. We like the one-page approach to specifying all the constraints. We rate it as Above Average on insightfulness and Average for how the analytics render.

**Configuration/Customization:** Customization is not allowed. All requests for functionality are incorporated into the code base and switched off by clients that do not wish to use them.

**Technology architecture/delivery options:** On-premises and hosted/private cloud where the client owns the solution as if it were on-premises. Public cloud is based on AWS.

**Service partners:** Deployments and support are performed in-house and this is expected to continue into the foreseeable future.

**Technology partners:** Microsoft, MemSQL, Gun.io, DevExpress, SciChart, SSW (Technology best practice consulting) Automatic Studio (UX design).

**User experience:** The solution has a strong orientation towards linking demand-creation and demand-fulfillment with the result being a one number forecast for S&OP discussions. The dashboards are quite nice. It has some unique functionality that inhibits people from gaming the system by compensating for shortfalls in past months by simply increasing results for subsequent months. We find the reports and promotion calendar to be very "griddy" and Excel-like. However, this does allow for exporting the Gantt chart to Excel to manipulate it. When you depart the solution and re-enter, it automatically takes you back to where you left off. We like the approach of using sliders when seeing the sensitivity of a 'what if' analysis. It is not an elegant solution, but it is insightful and feature-rich. We rate it as Average.

**Vendor trend:** Blueshift is relatively small but growing nicely. It has the ability to be perceived as the "local solution" for AsiaPac since Promax was acquired by Wipro. Being able to consistently sell TPM and TPO combined bodes very well. This is a growing company and one to watch in AsiaPac. A broad approach to solving data quality issues – currently under way – is quite interesting as a precursor to more insightful optimization.

**Strengths:** Having a strong financial analysis orientation is very relevant. The breadth of the offering given the size of the company is impressive. It feels much more like a platform than a tool because of the logical flow from "Business Plan" to "Customer Plan" to "Demand Plan" to "Settlement" to "Analytics" to "Administration."

**Challenges:** The TPO will need to be stepped up to provide true optimization. Performing iterative scenarios can be instructive, but optimization is the end game. Being able to do so should also improve outputs such as cannibalization. They are quick to acknowledge that the checkbook function within planning needs work and are working on it. There are pockets of really fine UX but it needs to be more consistent to provide a truly excellent experience. It is never easy to spread influence from AsiaPac to Europe and the Americas. Thus far, Blueshift has relied on word of mouth and personal contacts. Recent additions to in and outbound marketing capabilities can provide leverage, but Blueshift has been a bit late in the marketing game within this highly competitive space..

**Adjacent offerings:** Master data matching and loading for POS data, demand planning.

**Key differentiators:** Deep local market and overall industry expertise. The IBP approach, while not all in the scope of this analysis, gives it more avenues with which to generate interest from prospects.

**Outlook & prognosis:** Given good growth and regional expertise with a unique product stack for its target market, we see Blueshift as one to watch in AsiaPac.

**Evaluate Blueshift when:** You are in Asia/Pac — and particularly in Australia/New Zealand — and favor an IBP with "one number" forecasting approach to trade management. Also, if you need a partner that can help you with optimization where sell-out data is not very robust.

**Avoid Blueshift if:** You need a global solution or really just want basic trade management.

**Distinction:** POI Best-in-Class for S&OP Capabilities.

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**Comarch** sfa.comarch.com

**Profile:** A TPM offering from a division of a European-diversified IT vendor that is following its success in retail execution into the TPx space.

**Geographic presence:** Europe (100%).

**Total consumer goods users (seats):** 566.

**Tiers represented:** Tier 2 and Tier 3.

**Solution offerings:** TPM, TPO.

**Major product sub-segments not covered:** Tobacco, durables, and semi-durables.

**Analytics:** Includes an OLAP cube known as FastGrid and predefined views into the traded process. The report writer is drag-and-drop and quite intuitive. It has improved in graphical representation of data, but could still use more work. It has a very robust menu of KPIs that can be brought to the dashboard. Recent inclusion of regression-based predictive capabilities will put Comarch in a position to pursue TPO as well as baseline/promoted calculations and determine cannibalization. Overall we rate it as Above Average.

**Configuration/Customization:** Both are possible. Comarch is willing to assist in building out a custom solution.

**Technology architecture/delivery options:** On-premises, hosted in a private cloud.

**Service partners:** Comarch has done its own deployments to date.

**Technology partners:** Microsoft, Google, Samsung, HTC, DevExpress, SoInteractive.

**User experience:** Continues to improve. Dashboards can be personalized at the user level, which is a strong plus. Some features we like include:

- A step-by-step process which shows the progress visually through the use of a graphic above.
- Ability to drag from a line graph to get the price that you like and then have it segue to workflow for the next step.
- New layouts for master plans, inclusion of corporate strategy guidelines/details to aid the user when building promotional plans.

- New forecasting functionality for account managers to better understand opportunities and risks associated with a plan.
- A UX orientation that is more like a web page and not like a spreadsheet. There are those who prefer a grid-like view - and many solutions have them- so we like to highlight the distinction.

For UX, we rate it as Average.

**Vendor trend:** Comarch has a very small user base and has struggled to grow despite steady improvements in the product and a dedicated team to manage it. Nevertheless, we would describe its approach to TPx as opportunistic. The mother company is growing in revenue and headcount. It just needs to more declaratively enter the TPx space in order to grow.

**Strengths:** Deep capabilities across omni-channel and capabilities in HoReCa (hotel/restaurant/catering). Also, an established presence in retail execution, with both multinational as well as local CG companies.

**Challenges:** Getting mindshare and leveraging its strengths as an IT vendor.

**Adjacent offerings:** Retail execution, ERP, mobile device management, image recognition, POS data management/cleansing.

**Key differentiators:** The integration of Focus syndicated data for retail audits and tracking of leaflets in several Northern-European countries. This is very useful for promotional compliance. It also has a mobile solution to enable viewing and even some creating/editing of promotions while on the go. This is rare among tier 2 and 3 vendors. It renders quite nicely on a smart phone. It also has a very powerful workflow management tool that is basically a drag and drop decision tree for who and how to manage any process within a promotion. It is like nothing else we have ever seen and could enable a workflow for a group, seasonal activity, or even an individual person if desired. It is also one of the very few vendors willing to build out and help manage a custom solution.

Also noteworthy is a unique approach to the promotion cycle that starts with high level planning, then forecasting, then the actual promotion planning, execution/monitoring, and the post promotion analysis. This approach is not for everybody. We see tools that start with forecasting and others with post promotion evaluation and copying forward of some promotions. This approach makes the most sense to us. The high level planning also includes strategic guidelines. The monitoring includes compliance checks through Focus. We applaud this fresh approach.

**Outlook & prognosis:** Despite an improved product, we believe that it will need to greatly increase its exposure in order to grow in this space.

**Evaluate Comarch when:** You are a CG company in Eastern Europe (perhaps with some atypical routes to market, such as HoReCa) and are looking to get started in TPx with a partner that can provide an abundance of services to support you.

**Avoid Comarch if:** You seek a global solution, or a highly differentiated product.

**Distinction:** POI Best-in-Class for Mobile UX.

**CPG Toolbox** cpgtoolbox.com

**Profile:** A TPM offering built on the Salesforce.com platform that is making a global play.

**Geographic presence:** North America (55%), Latin America (20%), Europe (11%), and Asia/Pacific (14%).

**Total consumer goods users (seats):** Approximately 650.

**Tiers represented:** Tier 3. Many are affiliates of multinational companies, but the largest single client is only 125 users.

**Solution offerings:** TPM.

**Major product sub-segments not covered:** Tobacco.

**Analytics:** Many standard reports and some that are insightful. The dashboard has graphics and allows the user to create dashboard elements, which we like. The rest of the application is a grid that shows data but not much in the way of unique KPIs or insights. We rate it as Average both for insightfulness as well as how the data renders.

**Configuration/Customization:** Can be customized using the open APIs, which will not impede the upgrade path.

**Technology architecture/delivery options:** Multi-tenant SaaS on Salesforce.com cloud.

**Service partners:** Mindtree, West Monroe Partners, Demand Solutions Group.

**Technology partners:** WalkMe, Conga, Plex.

**User experience:** The Salesforce Lightning UX will be an improvement to the Salesforce Classic UX and will launch in November, 2017. Dashboards can be configured at the individual user level. Overall the UX is very "gridlike." The calendar has improved in recent releases and the hovers offer more flexibility to drag, drop, and stretch a promotion. The ability to clone and entire calendar or go event by event is nice. Also, the Functionality is complete but often the Salesforce platform dictates options like the ability to get rid of two zeros to the right of the decimal place when dealing with even large numbers. Functionality is complete, but UX is Average.

**Vendor trend:** Very good global trajectory for a 4-year-old company. Because it is a good option for companies wanting to step of from spreadsheets, it enjoys a steady deal flow of mostly Tier 3 companies. Bringing on a partner to provide global customer support in January 2018 should be a good thing. The support will only be in English, but it is still a positive step.

**Strengths:** Ability to work hand-in-hand with clients during discovery and implementation despite being a relatively small vendor. Early mover in delivering TPM on multi-tenant SaaS.

**Challenges:** Staying in touch with the needs of of a global client base.

**Adjacent offerings:** POS and syndicated data management within the TPM tool.

**Key differentiators:** Step-by-step, tutorial-driven deduction-clearing capability featuring heavy use of Chatter to engage multiple stakeholders. Impressive global footprint for a vendor its size and with no satellite offices outside of the USA.

**Outlook & prognosis:** Tier 2 and 3 are high growth segments and CPG Toolbox is an excellent transition from spreadsheets. Salesforce Wave analytics are very sexy but there are some basic analytical requirements that must be addressed before making such a big jump to AI. Having Crossmark re-sell the solution will help CPG Toolbox to focus more on the software.

**Evaluate CPG Toolbox when:** When you just seek TPM and TCO is very important; You are a Tier 2 or 3 CG company or a Tier 1 with a smaller affiliate abroad.

**Avoid CPG Toolbox if:** You seek a high-end user interface, require support services from the vendor beyond the software, or have an immediate desire for TPO.

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**Data Ventures, Inc.** dataventures.com

**Profile:** Data Ventures (DV) is a business analytics company offering TPx through analytical products and services through a SaaS platform for both manufacturers and retailers. It was spun out of the U.S. National Laboratories in Los Alamos, New Mexico and still has some operational departments located there.

**Geographic presence:** North America (78%), Europe (12%), AsiaPacific (5%) and Latin America (5%).

**Total consumer goods users (seats):** TPM: Approximately 200; TPO: Approximately 100. Approximately 300 Total. Enterprise licensing relationships do not allow for precise user counts.

**Tiers represented:** Tier 1 and 2.

**Solution offerings:** TPO and partial TPM (no checkbook or deduction management capabilities).

**Major product sub-segments not covered:** Household products, semi-durables, and durables.

**Analytics:** DV analytics extend well beyond the scope of this report into macro insights, shopper loyalty dynamics, assortment optimization, space management, strategic pricing planning, new product evaluation, and supply chain analytics. In summary, the ability to pursue the right promotional strategies. On the planning side this means promotion decomposition at the event level, understanding of brand and package switching, and calculation of pricing opportunities. The latter shows graphically which products to promote.

DV's expertise in post event analytics stems from its work with global retailers on POS/Scan/loyalty card analytics. It is arguably one of the most powerful analytical tools on the market. They can then be planned and monitored at the banner level. One ongoing engagement for a very large beverage company and a pair of very large retailers involves monitoring on-shelf availability with full root cause analysis by store every day by 10 AM. This has also extended into the ability to support promotions by predicting when a specific SKU will run out of inventory at a specific store 3-4 days in advance.

It is arguably one of the most powerful analytical tools on the market. In particular, the new Analytics Dashboard is an outstanding way of looking at the total business and pulls together many disparate elements from the previous version. We also liked the new landing page because it combines KPIs, narrative, and links. Overall, we rate it as Above Average.

**Configuration/Customization:** Requests for customization end up as an enhancement for the entire user base. There is the provision for a complete one-off solution if desired.

**Technology architecture/delivery options:** Private cloud and multitenant SaaS. Several large clients still require the solution to run behind the firewall so this is still an option.

**Service partners:** Capgemini (globally), Peak Ten (data services).

**Technology partners:** Capgemini for the Hadoop data lake. TIBCO/Spotfire for analytics and application delivery. IBM/AIX for product development environment. Linux for application library environment.

**User experience:** The solution is intuitive but not slick. Much of what is delivered is in the form of a grid so that it can deliver as much information as possible. There is so much functionality that it definitely feels like a power user solution with function over form. We rate the UX as Average.

**Vendor trend:** DV is a lifestyle company because it is owned by a Coca Cola Bottler in the US and, so long as it is profitable, it does not have the normal pressure to grow. Hence, their growth has been modest as focus has been placed on bringing more insight to their clients, rather than acquiring new ones. The deep partnering relationship with Capgemini is helping to expand services, but DV does not market itself aggressively, if at all.

**Strengths:** They don't like to be pigeon-holed into the beverage world, but the reality is they do a lot of work with many Coca Cola entities around the world and they are really good at it. That said, where causality is concerned for pricing, execution, promotional de-composition from the retailer and, manufacturer perspectives are concerned, they are very strong.

**Challenges:** Getting the tool in the hands of the basic account manager as opposed to the power users who are part of account teams or corporate. This is shifting because of the ability to push the insights into the hands of those who can act upon them, but the DV toolset itself is very much oriented to power users. Also, getting mindshare when their key clients in the beverage world are not motivated to tell anybody what they are doing or about the results they are achieving.

**Adjacent offerings:** POS data management/cleansing, shelf management, shopper analytics, supply chain management, assortment optimization, pricing optimization, and demand forecasting.

**Key differentiators:** The depth of the analytics and experience seeing things from the retailer side of loyalty card and shopper analytics. It is a really strong synergy and few competitors can do things like manage 1.2 million SKUs for a Japanese retailer for better merchandising, shelving, and pricing locally, let alone from halfway around the world. In particular, where we see depth on the TPx side is in volume decomposition, whether at the plan or individual level. Also, as it relates to monitoring and predicting out of stocks, which should be a part of any TPM approach. Thus, it is the insight on overall strategy development, details on how to execute a better promotion, and ability to monitor the execution remotely that differentiate DV.

**Outlook & prognosis:** DV will remain a highly competent and respected niche player for insights, simulation, and promotional monitoring.

**Evaluate Data Ventures when:** You want broad and deep analytics that completely surround the promotion process from strategy to execution.

**Avoid Data Ventures if:** You want a transactional TPM tool.

**Distinction:** POI Best-in-Class for HQ Analytics/Insight.

**Effectmakers** effectmakers.com

**Profile:** A European headquartered TPM vendor taking an eCommerce approach to selling its solutions as well as traditional engagement with implementation. This is their debut in our TPx Panorama.

**Geographic presence:** Europe (100%).

**Total consumer goods users (seats):** 1,144.

**Tiers represented:** All.

**Solution offerings:** TPM.

**Major product sub-segments not covered:** Tobacco, semi-durables, durables.

**Analytics:** Is based on a built-in report generator with a client-specific Microsoft Analysis Services cube that captures desired KPIs and functionality. Basically, it is a series of Excel-like grids. Some insights are available through sell-out data through a partnership with Catman, Inc., as the data is loaded into the data cube and can be utilized, but it is still largely self-serve. Cannibalization is a user input as an assumption, as it cannot be calculated by the system. Baselines are calculated through historical averages, not through volume decomposition or lift analysis. We liked the ability to highlight "risky" promotions that are below minimum selling price, exceed the volume cap, or do not meet margin criteria. Nevertheless, it did not have significant insights or analytical horsepower unless they are configured by the user organization. As a result, we rate it Below Average.

**Configuration/Customization:** Customization is not an option. Any company-specific adaptations would have to be through configuration.

**Technology architecture/delivery options:** On-premises, hosted/private cloud.

**Service partners:** None.

**Technology partners:** Microsoft Azure for hosting.

**User experience:** It has a tile-based landing page from which to navigate to the various functional areas. The UX is very monochrome and grid-like. Some editing to cells can be done through pop-ups. Reporting is self-serve and it is very easy to generate reports. A step-by-step guide to using the solution and getting your data into it. Basic business planning functionality for more B2B products (like food service) that is focused on pushing stock and not consumer offers. Ability to copy to Excel, manipulate, and bring it back into the tool is a nice feature. Overall we rate it Below Average. On the one hand it is simple, but on the other we don't find it attractive or engaging and did not find that it provides significant aid to users that enhance the experience.

**Vendor trend:** In relatively few years Effectmakers has been able to get a good mix of brand name, multinational as well as local clients in the Nordics and German speaking countries.

**Strengths:** Simplicity, attractive price point, local expertise in Nordic region.

**Challenges:** It remains to be seen whether selling the solution on-line and through re-sellers will allow them to achieve critical mass, but it is an interesting model and they are the only real entry level TPM solution in Europe so we will be watching them carefully.

**Adjacent offerings:** None

**Key differentiators:** The selling model is truly unique: Go online and play with the software. If you like it, then download your customer and item master with some help from their Business Integration Engine. Then just pay a monthly fee based on the number of direct and indirect users. They also have a higher touch, engagement-based model for larger enterprises, but the former is the one they feel will take off in the marketplace. Other than the low price, try-before-you-buy, and self-serve deployment model, it is not highly differentiated.

**Outlook & prognosis:** There is always a market for low-end TPM solutions because our POI survey data still shows that, despite the availability of TPM solutions for two decades, there is a perception that they are too expensive. The Effectmakers selling model is intriguing and we predict that it can garner interest globally because it does not require any local sales or support offices. However, we see it as niche because most companies we survey and speak with are asking for more services, support, and best practice inculcation rather than less. Nevertheless, we applaud their being a low cost, self-serve option.

**Evaluate Effectmakers when:** Your primary TPM requirements are for a basic, cost effective, and largely self-supporting approach. Also, if you like to try before you buy or value local expertise in the Nordic region.

**Avoid Effectmakers if:** You desire a broader range of support and service options. Also, if you want to move quickly beyond TPM to TPO or place value on functionalities such as workflow, rich analytics, or a superior UX.

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**Exceedra** exceedra.com

**Profile:** A European headquartered vendor focused exclusively on TPx with an orientation towards integrated business planning (IBP).

**Geographic presence:** Europe (58%), North America (40%), Asia/Pacific (2%).

**Total consumer goods users (seats):** 3,300 with 1,800 of those utilizing it for both TPO and TPM.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco.

**Analytics:** The landing page and dashboard are both excellent. They have done some really nice things with Microsoft Power BI since it became the standard and are benefitting from being early adopters. They offer pre-built reports and views as well as self-serve. In particular, we liked the consistency of the report look and feel across the application. We also like the ability to create personalized dashboard elements and make them pervasive over time even though the standard reports are robust and insightful. There are pivot table options as well from the reporting cube. We like the ability to see both a grid and a graphic side-by-side. We also like the ability to compare the entire plan in scenario mode, as opposed to just the event. Pretty much anything in the system can be exported for sharing or further analysis, including being pushed out through a mobile device. The solution has a strong financial orientation to highlight contribution vs. spend or promotion contribution. It has embedded predictive and post event analysis. For analytics we rate it as Above Average. It is a superior analytical product.

**Configuration/Customization:** Customization is allowed but not preferred. Exceedra looks to add requested functionality into the standard solution, but has done a one-off when the client opted for it.

**Technology architecture/delivery options:** On-premises, hosted/private cloud, and public cloud. All of these are the same technology and code base.

**Service partners:** Tata Consulting Services (TCS), Mindtree, Clarkston Consulting, Eye-on, Genpact, PWC.

**Technology partners:** Microsoft Azure for hosting and underlying technology. SKU Track for POS data integration.

**User experience:** The solution now offers more ability to model constraints, which helps the optimization process. It also has "guardrails" baked in to guide the optimization within company guidelines. We also like the ability to copy over only the successful promotions from the prior year, while leaving those that were not. The solution is quite flexible with lots of filtering to pare down all the data and options. Some views of data or a graphic can be saved for future reference. A promotion can be created directly from the calendar view or users can insert a totally new one. We particularly like the flow and navigation using the "next" button. The graphical approach to post event analytics with the ability to then drill into the details is very nice. For UX, we rate it as Above Average.

**Vendor trend:** Exceedra has a very strong trend relative to geographic expansion, headcount, and revenue. It also has very strong client retention.

**Strengths:** Exceedra offers a strong blend of analytics, usability, and industry expertise. We often don't see this balance in other vendors. Also noteworthy is the ability to leverage S&OP requirements, such as baseline creation and mutual priorities, to bring the promotion cycle into the conversation. 90% of their European clients use them to create a baseline sales forecast. Also, a strong stable of services partners for deployments allows them to focus on being a more innovative software company.

**Challenges:** Their primary challenge is managing growth and making the transition from regional to global player. Many multinationals have mental hurdles about how big a TPx firm most be to be considered. Exceedra has to navigate this fine line between growing too fast in order to be taken more seriously, and still being able to execute for all tiers of clients. However, having a strong partner network already in place will be key.

**Adjacent offerings:** POS data management/cleansing, demand planning.

**Key differentiators:** We were very impressed by the in-context reporting capability, which is a highly differentiated way of anticipating what a user may want to see based on a current activity. We are big fans of using machine learning to optimize promotions, but also see the benefits of using it to learn and anticipate what a user might want to see at just the right moment. Additionally, the new pre-configured solution for more rapid deployment gives a prospect more options, either as a company, or for various geographies. It also keeps Exceedra highly relevant with Tier 2 and 3 prospects by reducing time to value. This is a very nice and unique enhancement to the offerings.

**Outlook & prognosis:** We see Exceedra becoming a global player. It has a focused strategy, is avoiding the pitfalls of the "deployment quagmire," speaks the business (as opposed to technology) language in selling situations, and has good client references.

**Evaluate Exceedra when:** You seek quality in both TPM and TPO as an integrated and yet modular proposition, have global intentions, like to look at promotions from a financial perspective, and are looking to link demand creation to demand fulfillment with integrated S&OP.

**Avoid Exceedra if:** We don't see a compelling reason to avoid Exceedra.

**Distinctions:** POI Best-in-Class for Field Analytics/Insight, S&OP Capabilities.

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**Flintfox** flintfox.com

**Profile:** A company with a deep connection to Microsoft through the Dynamics platform and the only TPM player in the Microsoft Global ISV program. It is a global player despite not having a TPO offering. In addition to their Microsoft offering, Flintfox have developed their Performance, Pricing and Promotion functionality into its own platform, RMx. It can integrate with non-Mircosoft ERP solutions such as SAP or Oracle.

**Geographic presence:** North America (50%), Europe (25%), Asia/Pacific (20%), Latin America (5%).

**Total consumer goods users (seats):** Approximately 9,000. Enterprise licensing model does not provide much precision on seats.

**Tiers represented:** Tier 2 & 3.

**Solution offerings:** TPM.

**Major product sub-segments not covered:** None. It has a very diverse footprint across sub-segments, including more B2B-oriented products.

**Analytics:** The recent addition of Microsoft Power BI is a real plus and we expect to see more appealing visualization and reporting over time. The Flintfox TPM offering has very robust analytics, from a pricing waterfall with up to 35 levels to simulation of very complex pricing schemes. The real-time pricing engine is impressive, particularly where frequent price changes occur such as in eCommerce. The account planning overview dashboard is quite insightful and has a strong financial orientation. Visualization we rate as Average, but improving. The overall analytics we rate as Above Average.

**Configuration/Customization:** Any customization would have to be done through source code branching so that the solution stays within the upgrade path.

**Technology architecture/delivery options:** Core execution components are well suited close to the ERP and behind the firewall. Additional web components can reside on a private or public cloud. Most deployments in the last year have been in the cloud.

**Service partners:** Flintfox Consulting Services, Blue Horsehoe, PwC, Columbus Global, Edgewater Fullscope, Microsoft Consulting Services, Blue Horseshoe, MCA Connect, HP, Avanade, Hitachi Solutions.

**Technology partners:** Microsoft, SAP.

**User experience:** The solution is very powerful and the navigation is intuitive, but it isn't very attractive. It has improved in the last year or so, and for several years running, but we still rate it as Below Average. There is a stark tradeoff here between power/insight and esthetics. It also lacks some basic components that a user needs to manage promotions such as Gantt charts to visualize the promotional calendar. There also tends to be lots of white space on the screens and the numbers/letters don't fill their spaces well. At times they are downright hard to read.

**Vendor trend:** Flintfox has a strong trend in revenue, headcount, and deal flow as a total company as well as in the TPx business line. New offices in Brazil and the United Kingdom will continue to support that momentum. Because of its Microsoft ERP relationship and work beyond the more common food and beverage segments, it had grown at more than 31% CAGR since 2011.

**Strengths:** The Microsoft relationship is a strength across the board, from AX integration to infrastructure. It also has a strong service delivery capability both internally and externally.

**Challenges:** As Flintfox is the only vendor we have evaluated that is based on Microsoft AX/D365, we can only surmise that the inability to deliver a superior user experience is a limitation on AX/D365. Despite focus and resources, it just isn't on par. On the one hand, this might not be as problematic as tier 2 and 3 durable and semi-durable companies are not as hard to please as the tier 1 multinationals that play in food/beverage and personal care. Nevertheless, the UX is a challenge.

**Adjacent offerings:** POS data management and cleansing, advanced pricing management (as a module or standalone).

**Key differentiators:** In three respects Flintfox is in a league all its own:

1. Ability to handle complex promotional programs and agreements including pricing scenarios, tiered arrangements, rebates/commissions, and waterfall elements. Not only does it handle all of the complexity but also accountability for the various transactions.

2. Penetration into markets, such as automotive, oil & gas, consumer electronics, paints and chemicals, office products, and furniture, or janitorial products, which other TPM vendors just haven't dared or been able to venture into. Some of these clients have industrial as well as consumer divisions and this has driven the need for some of the rebating and price management functionality.

3. The Microsoft relationship for AX ERP integration and other capabilities that extend beyond the typical use of SQL or Analysis Services.

**Outlook & prognosis:** Because of the unique functionality for complex promotions and experience with products you would see at a specialty store, home store, or mass retailer, we see Flintfox continuing to thrive. And, because we are beginning to see it more at food/beverage/personal care companies, we believe that it can enter these sectors faster than competitors can enter its stronghold.

**Evaluate Flintfox when:** You have global solution needs or your requirements align with any of the Flintfox differentiators above. In a word, if you are more focused on managing deals and agreements (and complex ones at that) than promotional events.

**Avoid Flintfox if:** You want a state-of-the-art UX, TPO, or the use of a visual promotional calendar is central to managing your promotions.

**ITC Infotech** itcinfotech.com

**Profile:** ITC Infotech is the IT services subsidiary of ITC Ltd, an Indian conglomerate that includes many key consumer goods subsectors: tobacco, food, apparel, stationery, and personal care products. As such, it not only has created a TPx offering for its parent company, but has a solution offering for other companies.

**Geographic presence:** North America (12%), Latin America (8%), Europe (72%), and Asia/Pacific (8%).

**Total consumer goods users (seats):** 4,900.

**Tiers represented:** All. Primarily focused on food and beverage, tobacco, and personal care/beauty/pharma OTC.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Consumer semi-durables and durables.

**Analytics:** Optimization has seen some nice enhancements such as the ability to see 4 scenarios side by side while changing the constraints. We also like that the output is graphical instead of a grid and shows cannibalization graphically. The system can also define the optimal combination of sales controllables (timing, duration, frequency, tactic, and price point) to maximize a desired outcome such as lift or profit. It has several ways of measuring the business in a unique way or with a unique KPI. We rate analytics as Above Average.

**Configuration/Customization:** ITC Infotech offers both options and can perform and maintain significant customizations. However, this is not preferred. And, given the small number of client companies, it makes more sense to build any subsequent requirements into the standard product.

**Technology architecture/delivery options:** The TPM product is based on Siebel Application with Open UI. The TPO is based on Oracle OBIEE as a service, using FTP to connect to TPM. Both are offered as on-premises, hosted/private cloud, or on a public cloud. A TPx solution based on Microsoft Dynamics 365 will become available in late 2017. It will be PaaS and SaaS for tier 2 and 3 companies. Support will continue for Siebel/Oracle into the foreseeable future. It will simply expand the offering to both MS Dynamics and Siebel concurrently.

**Service partner:** ITC Infotech does all of its own services work.

**Technology partners:** Oracle Corporation, Microsoft Corporation.

**User experience:** We like the ability to see a scenario or outcome and then click "next" to keep it and move forward. We also like the ability to create a dashboard to meet user-specific preferences. The calendar has drag/drop/expand/collapse, which we find very useful. We also like the ability to toggle to the previous year's calendar as a refresher as to what it entailed. Additionally, you can see the current year compared to the planning year to further enhance the perspective. Hovers are very nice and detailed. Also, it has the ability to view the marketing calendar to either leverage or avoid overlaying trade events onto consumer events. Functionality is rich and has seen some ergonomic enhancements like the "90 Second Promotion," but UX we rate as Average because we don't see it as having a very modern look and feel.

**Vendor trend:** It continues to have a user base concentrated on a small number of customer organizations in tobacco, personal care, beverages, and household products. It is low-growth in TPx by all key measures despite its mother company comprising only 10% of its users. ITC Infotech has a solid TPx product, vast resources, and an ability to customize and support its products that others do not have. What it lacks is the ability to attract new clients.

**Strengths:** Ability to deploy on enterprise platforms like Oracle Siebel. Also, significant resources in a company with 6,500 employees. When they win, it is because of the implementation and ongoing support more so than the product itself.

**Challenges:** ITC Infotech is interesting as a company and with how it utilizes Siebel, but it does not position itself well in the marketplace. It has not yet achieved critical mass in terms of number of clients or total consumer goods users. It also does not have an eye-popping UI that draws in a prospect when shown as an example on a website or PowerPoint. Thus, it will have to garner interest through contacts and outreach. This has, and will, continue to be the seminal challenge.

**Adjacent offerings:** POS data management/cleansing, retail execution, coupon effectiveness analysis, Trade Marketing Command Center.

**Key differentiators:** Strengths in Siebel Open UI and a unique relationship with Oracle. Also, the experience as part of a consumer goods company that owns and uses it as a software vendor. It is the only software company we know of that is owned by a highly diversified consumer goods manufacturer, which gives it a captive audience for understanding the market and testing new capabilities.

**Outlook & prognosis:** ITC Infotech has broad resources and but will need to market itself better to have a chance of capturing mindshare and expanding into tier 2 and 3 opportunities. We do not believe that this will change with the MS Dynamics TPx offering. The key lies in sales execution. This does, to some degree, benefit user organizations because they will have a large voice amongst so few. However, the tradeoff is the degree ITC Infotech will continue to invest if it's not growing its install base. Ergo, we believe that improving sales execution to kick start growth is the best option.

**Evaluate ITC Infotech when:** You currently have Siebel TPM and want to preserve this investment while adding functionality and usability. Also, if you seek expertise in the Asian market (and emerging markets in general) or wish to add significant ongoing services to your deployment. Finally, if you have MS Dynamics for ERP see the value of connecting the Dynamics 365 TPx solution to it once it is available.

**Avoid ITC Infotech if:** You just want software, and perhaps basic TPM software at that.

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**Kantar Retail** kantarretail.com/xtel

**Customer profile:** Kantar Retail is the retail and shopper insight, consulting, and technology part of Kantar Group, the data investment division of WPP. It is making a global play with TPx deployments in over 50 countries. It also has more than 20 years enabling sales processes in the consumer goods industry.

**Geographic presence:** Europe (80%), Latin America (8%), Asia/Pacific (8%), North America (3%), and the Middle East (1%).

**Total consumer goods users (seats):** 7,600.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco.

**Analytics:** Now offers more out of the box analytics and less need to build. The landing page/dashboard are exceptional in the insights for managing the business and how they render graphically. The Funds Optimization module (we think it should be called Investment Optimization) has very nice HQ functionality for determining where to spend/invest. It combines the learnings from past promotions with the goals and constraints to predict future performance, then utilizes the TPM functionality to allocate the funds across markets, retailers and products; and then manage the execution. Many other solutions are heavily weighted to either HQ or the individual event. We find that Kantar Retail has a great blend of both. It also has some unique KPIs that are visualized in interesting ways. It tends to start with a graphical chart and then be able to drill into a table and more detail. It also has a unique ability to see both a graphic and a grid side by side. Examples of some insightful views include: cost of non-compliance, competitive promotional activity, reasons for non-compliance, and POS compliance. Its dashboards are strong and graphical. Promotions by store in a 2X2 matrix is very cool. Optimization expands beyond just the promotion mechanics to include assortment, product, and timing. It also has an Excel plug-in that is the best we have seen, for those who favor Excel. For insightfulness and how the data renders graphically, we rate it as Above Average.

**Configuration/Customization:** Both are offered, as well as a pre-configured, rapid deployment version.

**Technology architecture/delivery options:** On-premises or hosted on Microsoft Azure or Amazon Cloud (AWS).

**Service partners:** Everis/NTT Data, HCL, ICB Works, Business & Decision.

**Technology partners:** Microsoft, Oracle Database Management Systems, Qlik, Amazon Web Services for cloud infrastructure.

**User experience:** It is a superior user experience with a mix of ergonomic and graphical elements in HTML5. All constraints in TPO can be entered from a single location. Being able to define promotional ranges by using a slider is both convenient and cool. The calendar is also very nice because you can stretch it, drag and drop, add color coding based on how it is trending, and even do optimization directly from the calendar. We rate it Above Average.

**Vendor trend:** Kantar Retail has begun to catch its stride in sales execution in the TPx offerings as the "Kantar Retail Trade Optimisation" practice works in concert with the other Kantar offerings. We see more integration of those assets and more traction in the market place. This favors CG companies because it gets them thinking more holistically about how they go to market. We also see Kantar in more RFPs and on more short lists than in the previous 3-4 years.

**Strengths:** Industry expertise, strong product functionality and usability, excellent vision, and strong client references. A very strong roadmap for innovation to support revenue growth management. Offering best-of-breed for both TPx and Retail Execution.

**Challenges:** The key challenge lies in continuing to improve sales execution globally to ensure that it gets its fair share of deals. In fact, it should get more than its fair share of deals because it has a superior product, both from a functionality and UX perspective. Getting more traction in North America is critical.

**Adjacent offerings:** Sales quota and incentive management, retail execution, sales volume planning, portfolio optimization, assortment optimization, virtual store/merchandising visualization, POS data cleansing, image recognition, retail and shopper insights.

**Key differentiators:** Offering a separate template approach and different solution models based on what sort data is available is a really insightful way to go to market in order to drive the forecasting and optimization processes for Tiers 1-3. Also, the breadth of the offering around promoting and executing is unrivaled: Kantar Retail iQ to deliver the right shopper and retail insights; SKURAT/RichMix assets to determine the right product mix and planogram; Kantar Retail Virtual Reality to conduct collaborative sessions with retailers; XTEL to execute it; Planorama to capture it; and XTEL to track performance/incentives.

**Outlook & prognosis:** Kantar Retail XTEL will become a global leader in the next 3 years on the back of its quality and breadth of solutions and influence network.

**Evaluate Kantar Retail XTEL when:** You favor a strong user experience, excellent analytics, and European expertise with the potential to expand most everywhere. Also, evaluate when you seek TPx as part of a larger, strategy-to-execution solution.

**Avoid Kantar Retail XTEL if:** You seek something cheap and simple to meet basic requirements such as funds management.

**Distinctions:** POI Best-in-Class for Analytics Visualization, TPO ergonomics,

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**Klee Commerce** kleecommerce.com

**Profile:** A Europe-centric vendor with a blended TPM and retail execution solution combined with store and shelf visualization. It also has retailer as well as manufacturer clients.

**Geographic presence:** North America (4%), Latin America (2%), Europe (92%), and Asia/Pacific (2%).

**Total consumer goods users (seats):** 13,200.

**Tiers represented:** All. Clients include food and beverage, personal care, and household appliances.

**Solution offerings:** TPM.

**Major product sub-segments not covered:** Tobacco.

**Analytics:** Has improved dramatically in the last year or so. We now rate it as Above Average due to features such as customer segmentation and performance analytics, and various ways of looking at the relationship between discounts and outcomes. The Klee preferred option for BI solution is embedded SAP Business Objects, but Microsoft is also an option.

**Configuration/Customization:** Fully configurable as a single solution across all functions.

Users simply turn on and off the functionality that they want, thus enabling hybrid processes. Klee can also provide unique functionality for a specific client and will provide development and support resources, if so desired, but such an effort cannot impede the upgrade path for that customer.

**Technology architecture/delivery options:** On-premises, hosted/private cloud, and public cloud based on Microsoft Azure. All cloud clients have their own instance of both the frontend and database.

**Service partners:** Klee does its own deployments through its Klee Consulting and Integration arm. Training and support are done through Peppy-Tools (France) and the Retail Factory (Latin America).

**Technology partners:** SAP, Oracle, Microsoft.

**User experience:** The transition to HTML5 has improved what was an already compelling UX. In particular, it is extremely graphically oriented, which we prefer to mere numbers or a grid. Some of these graphics actually correlate to the client's product line. For example, the bottle for the beverage company becomes more or less "full" graphically based on the size of the opportunity. Document sharing and facilitation of social selling are also enhanced. It also offers a tile-based orientation, more ergonomics, a vastly improved calendar including a management view, revenue vs. discount percentage to determine who is getting the most discounts as a percentage of gross sales, and composite KPIs with drill down. These features result in increased sales effectiveness. Klee also continues to offer the ability to configure dashboards at the user level through "skins." We rate this as Above Average for UX.

**Vendor trend:** This is a boutique company that is owned by the 3 founders and its employees. It is more focused on innovation than growth. It is profitable, but favors investing in adjacent businesses such as virtual store/visualization over geographic expansion. Those users that are outside of Europe are the result of supporting user organizations abroad rather than expanding abroad.

**Strengths:** Analytics and shelf visualization/simulation. A nice mobile solution on iPad and Microsoft Surface for working in the field and keeping track of promotion details. Strong functionality for retailer-specific contracts at the store level. Expertise in consumer durables. Willingness to create and service a custom solution. Ability to accommodate unique requirements in the French and Italian markets. Extension to the Klee Commerce platform through web services offers omni-channel capabilities. A relatively large consulting organization that is about 3 times the size of the product team and all focused on this industry.

**Challenges:** The inability to expand beyond a toe-hold in Asia/Pacific, North America, and Latin America, which, combined, are only 6% of total consumer goods users. This percentage has remained constant over the last few years. Despite strong client retention and an excellent product, it struggles to grow mindshare. The biggest challenge lies in getting visibility in the market place for solutions that are highly engaging and evolved. Klee needs to market itself better.

**Adjacent offerings:** Storage of digital assets, TPM, coupon generation that can be used by partners through web interface, media asset publication, and distribution. The in-store simulation that can build out shelves and fixtures from bare walls and floors is very unique. Once the shelf/fixture is assembled it provides rich visualization, including the ability take a product off the shelf and handle or manipulate it in 3D as if it were in a human hand.

**Key differentiators:** A superior, break-out user experience including off-line capabilities and the quality and extent of the graphics throughout the solution.

Deep levels of complex pricing, which is often more the norm in France than other markets. Store-shelf visualization, analytics, and expertise in the European market.

**Outlook & prognosis:** Klee will continue as an innovative boutique solution in the European market. In particular it will appeal to high-end consumer goods companies in Europe.

**Evaluate Klee when:** You seek a partner to help you adapt and possibly customize a solution to your specific requirements and value expertise in the Western European market, particularly France. Also, you like robust product visualization and in-store simulation capabilities or want additional capabilities for omni-channel selling.

**Avoid Klee if:** You seek multitenant SaaS, TPO, or a global solution.

**Distinction:** POI Best-in-Class for Desktop UX.

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**Nielsen** nielsen.com

**Profile:** Nielsen is a global research, data, and analytics company that studies consumers in 100+ countries around the world. It can best be described as being in the business of measuring and understanding what people watch and what they buy. TPx is offered as part of Nielsen's Revenue Management and Optimization solution, which is part of Nielsen's broader Sales Effectiveness practice.

**Geographic presence:** Europe (35%), North America (40%), Latin America (15%), Asia Pacific (10%).

**Total consumer goods users:** Estimated 6,500. Licensing structure is not by named user.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco, durables and semi-durables.

**Analytics:** Nielsen now has an analytics launch pad from which to navigate to get the insights. This is a really nice enhancement. We have found the analytics deep and insightful from the "HQ" and strategic level for the entire plan, then they go into the particulars of products and customers (what Nielsen calls "tactical plan"). The portion focused on planning for cases of product and spending budgets is a work in progress but is coming along nicely in early deployments. Once the two (HQ and budget level tactical plan) are equal in stature to each other they will be a powerful combination. In particular, we also like that there are help screens to interpret and advise on an area of insight. Each step along the way requires analytics and Nielsen combines the insights, analytical frameworks, simulation tools, and even mobility. We were impressed with ways of looking at elasticity, purchasing thresholds with store level data, and pop-ups with definitions to provide context around the analysis. We rate it as Above Average.

**Configuration/Customization:** Adaptive requirements are made through configuration. All requests for additional functionality for either the front- or back-end are assessed, prioritized, and built into the plan. A one-off that would take it out of the upgrade path is not an option because it is multitenant SaaS.

**Technology architecture/delivery options:** Private cloud.

**Service partners:** HP, Thorogood.

**Technology partners:** MicroStrategy, Tata Consulting Services (TCS), Cloudera.

**User experience:** Has been enhanced with tile-based navigation and a much better UX. We found it to be much less of a power user tool and more appealing to the masses. Navigation is a big part of this, but also there is much more of a flow versus some charts and reports in lists if you know where to find them. We found the planning function to have just the right combination of graphics along with data without being overly "gridlike". In fact, we particularly like the approach of starting with an insight through a graphic and then drilling into the grid for the details. The HQ planner and consumption-based tactical planner we rate as Above Average. The tactical planner for cases and budgets we rate as Average but improving because the focus has been on adding functionality to the former G4 toolset that had minimal tactical planning capabilities. We expect UX to come along in the next year or so to bring the two on par.

**Vendor trend:** The combination of software, services, and expertise has resonated in the marketplace. It is often able to maneuver around blanket software purchasing decisions that go to the enterprise software vendors because Nielsen is so widely known, offers the tools as a service, and bundles them in with some sort of engagement. The company has faced some stiff headwinds in recent months, but ironically, the TPx product has made more strides during the last year than several previous years, so we see it overall as positive.

**Strengths:** The depth of analytical resources and industry experience are unrivaled. The emerging ability to really nail both the HQ insights and tactical planning in a single tool is a real strength because so many competitive offerings are only really good at one or the other.

**Challenges:** Getting a bit of a late start on the tactical TPM side has meant that many Nielsen clients already have a tool. The ability to price it right and implement it fast will allow it to move down market where there are still Tier 2 and 3 opportunities.

**Adjacent offerings:** POS data management/cleansing, shelving strategy development and management/visualization, retail execution strategy development and compliance tracking, marketing mix modeling, concept testing/simulation.

**Key differentiators:** The ability to create the strategy and drive it down to tactics with all of the accompanying analytics. Also, the depth of knowledge of the consumer goods industry. $6+ billion in revenues and 44,000 employees with 55% of the business focused on what gets purchased never ceases to impress.

**Outlook & prognosis:** Nielsen is already a global player. As it continues to showcase its unique approach to TPx, it will be a global leader as lines between software and services continue to blur. CG companies just want help with a set of problems and Nielsen can deliver against them. The Nielsen Revenue Management and Optimization messaging lines up well with an industry focus on Revenue Growth Management (RGM)

**Evaluate Nielsen if:** You value deep analytics and industry expertise to improve your TPx processes.

**Avoid Nielsen if:** You favor an on-premises solution, are a durable/semi-durable company, or simply want a transactional TPM tool.

**Distinction:** POI Best-in-Class for HQ Analytics/Insight.

**Oracle** oracle.com

**Profile:** An enterprise software vendor and longstanding TPx player through its own solutions as well as the acquisition of Demantra and Siebel.

**Geographic presence:** North America (45%), Europe (30%), AsiaPac (15%), Latin America (10%).

**Total consumer goods users (seats):** 9,500 (POI estimate).

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** None.

**Analytics:** Much of the development effort has been focused on moving the application stack to the cloud. Nevertheless, we still find the analytics to be very powerful with many out-of-the box options. We liked the graphical approach to post event analytics as opposed to just showing numbers. Also, the ability to add a note to capture the insight as to what happened and why. The Oracle approach to optimization is beyond doing scenarios. It means being able to have the system determine the best option, whether for a promotion or an entire calendar. We like the ability to optimize the calendar and then lock certain elements while tweaking others, thus combining true optimization with some scenario elements. This is beginning to get user acceptance after some initial reluctance to trust the system to do so much of the planning. The entire optimization process is well embedded and intuitive. All of the analytical requirements are included: base and lift forecast for both shipments; category analytics including impact on competition, brand switching, and even account switching; and cannibalization/halo effects. We also note the quality of the mobile analytics for managers or as a companion to the desktop. We found that the Oracle Demantra solution delivers the depth of insights in a very pleasant mobile solution. For analytics we rate it as Above Average. The rendering of the analytics needs a refresh in the coming months to keep from slipping to Average.

**Configuration/Customization:** Extensive configuration is possible so long as it will not impact the ability to upgrade.

**Technology architecture/delivery options:** On-premises, Private Cloud, Oracle Public Cloud, or 3rd party public cloud. Oracle Public Cloud is the preferred infrastructure option and has the added advantage of being able to use the Oracle automation tools, which they claim makes the installation of the out-of-the box version up to 90% faster.

**Service partners:** Accenture, Avata, Capgemini, Clarkston Consulting, Cognizant, CSC, Customer Systems, Deloitte, Fujitsu, Genpact, Hitachi Consulting, IBM, Inspirage, ITC Infotech, Oracle Consulting, Perficient, Praesto, Red Rock Consulting, TCS.

**Technology partners:** IBM, Microsoft.

**User experience:** The user experience is very good. It is ergonomic and intuitive, notwithstanding the previous comment about how the analytical elements render. The calendar is strong because of how it allows for high level as well as drill down – and includes digital marketing elements. Giving users a mobile version also enhances the overall UX as well as letting users configure their own desktop. We rate the UX Above Average.

**Vendor trend:** We see Oracle getting its fair share of deals, if not a bit more. In particular, it is driving improved results in Tiers 2 and 3. Also noteworthy is its momentum in durables and semi-durables. Some Tier 1 clients that were using Siebel chose not to upgrade and went with competitors. Oracle has seen some softening in deal flow as much of the demand has been in Tier 2 and 3 companies, where the vendor does the implementation. So, although Oracle has a vast services network, there is an untrue perception that this results in additional cost. Nevertheless, we saw Oracle working down market several years ago and it is the most formidable of the enterprise software companies when it comes to tiers 2 and 3.

**Strengths:** It is truly an end-to-end solution from capturing insights to planning to execution and monitoring. The predictive modeling is very advanced and seeks to optimize many factors, not just revenue or profit.

**Challenges:** There is a perception in the market place that Oracle is heavily focused on SaaS and cloud applications. Our survey data shows that there is still a sizable market for on-premises TPx solutions - and the Oracle Demantra solution still has an on-premise option. It is important that Oracle continue to actively position both options to dispel this perception. A major Oracle competitor lured away 3 Tier 1 Oracle clients to an on-premise solution by stressing the ability to choose the delivery option as opposed to overt cloud focus. This will continue to be a challenge as legacy Siebel instances face de novo implementations to take advantage of Demantra capabilities, or look at competitors.

**Adjacent offerings:** Demand signal management, S&OP, supply chain management, retail execution.

**Key differentiators:** The depth of the service partner network, quality/usability of the predictive modeling, and the mobile solution.

**Outlook & prognosis:** Oracle is already a global leader and will continue to be so into the foreseeable future. Continued penetration into Tiers 2 and 3 will be key.

**Evaluate Oracle when:** You have global or local needs and seek a combination of product and support for pretty much any aspect of TPx. Also, if you want a really solid partner for the journey from TPM to TPO.

**Avoid Oracle if:** You really want a basic, inexpensive point solution. Also, if you want a single vendor to provide both software and business related services/outsourcing.

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**Periscope By McKinsey.** periscope-solutions.com

**Customer profile:** A highly analytical TPM/TPO offering that embeds McKinsey intellectual property and a broad array of services into the promotion cycle.

**Geographic presence:** North America (46%), Europe (24%), AsiaPac (5%), Latin America (15%).

**Total consumer goods users (seats):** 1,500: 350 for TPM and 1,150 for TPO.

**Tiers represented:** All tiers. Primarily in food and beverage.

**Solution offerings:** TPM and TPO. TPM functionality includes planning but not budgeting, accruals, or settlement.

**Major product sub-segments not covered:** Tobacco, consumer semi-durables.

These are served from the retailer perspective but not specifically from working with manufacturers.

**Analytics:** The advent of the self-serve portal is a real plus because it opens up the models (Python, R, and SQL) to data scientists and analysts to be more self-reliant and make adjustments more quickly. Enhanced elasticity models are now part of the on-line toolset for anybody with a browser. From the acquisition and preparation of data, to insight-based planning, to simulating the best possible promotion, this is where Periscope excels. In particular we found these analytical aspects to be compelling:

- 10+ baseline methodologies.
- Ability to simulate volume transfer to de-listed SKUs.
- Dynamic price and promotion modeling to empower RGM. Also, the ability to manage mark downs to better enable the entire product life cycle.
- Advanced capabilities, such as cross elasticities, which many TPO vendors do not have.
- Ability to simulate "never before run" promotions.
- Performance, both in data rich and data poor environments.
- Ability to aggregate optimized scenarios to see total impact at various levels.

We rate analytics as Above Average both for insight as well as how the data renders.

**Configuration/Customization:** Customization is possible and Periscope will provide resources to support customization needs. However, it is not common as the off the shelf solution is highly configurable.

**Technology architecture/delivery options:** On-premise (still offered; works well in counties/regions where internet is less reliable), hosted/private cloud (possible but less common), public cloud (preferred).

**Service partners:** McKinsey & Company, Eversight for offer innovation. Periscope does its own implementations through the global capabilities in 26 locations in 17 countries globally. It currently supports clients on 6 continents.

**Technology partners:** Microsoft (hardware and software), BoardwalkTech, Tableau, Amazon Web Services, Host Europe, Alteryx, Spark, Exasol.

**User experience:** The TPP (planning and analytics solution) has been enhanced to better enable front-line users from planning to execution. This includes workflow for approvals as well as usability. Solutions with deep analytics often favor power users because they have a cockpit like a major airliner. Periscope, however, has combined power with simplicity in a HTML 5 delivery. If a grid is necessary to show the relevant data, it is done in a way that is the most visibly appealing and utilizes pop-ups for making changes. It is very visual/graphical; as much so as any other solution we have reviewed. In particular, we like the ability to create a scenario, review it, compare it side by side with an actual, and then create even more scenarios for side-by-side comparison. It also has a robust capability for a reviewer to add a detailed annotation and send it back to the author as a form of internal collaboration. We also like the modular approach to not swamp users with functions that they do not use. Also, the very robust Learning Management System and eLearning modules wrap themselves around a user as part of the overall experience. We rate UX Above Average.

**Vendor trend:** Total employee count for Periscope is up from 350 to 550. The user base is up 22%. Retailers as well as manufacturers continue to choose Periscope to help them with their promotions. This is not surprising for three reasons:

1. CG companies have shown that they like a combination of technology plus support services and the flexibility to tailor how they are delivered to their own needs.
2. Retailers tend to run very lean with headcount, but when appropriate will contract for value-added services.
3. The industry focus on analytics as a competitive differentiator and a key requirement for stealing share from others.

**Strengths:** The depth of experience working the promotion cycle for both manufacturers and retailers gives them hands-on understanding of what retailers are thinking about and struggling with. This dovetails nicely with the willingness and ability to manage and data hygiene of retailer POS as well as other data sources. We find too few TPx vendors that are willing to get their hands into the data, but instead assume that somebody else will provide clean data. We also see the linkage between category management and TPx to be a real plus because of how the insights can be easily brought to bear in the planning cycle. Industry expertise and depth of talent base are also big factors for Periscope to enable a focus that starts with the strategy and includes marketing as well as trade effects. Also, the proven ability to co-exist with a transactional TPM tool.

**Challenges:** Periscope is now nudging up against a complete TPM tool but lacks some aspects. This makes it reliant on some TPM functions already mentioned above or else duplicated. Yet these functions are not terribly analytical and not value added, but Periscope will need to move to a complete TPM or spend a lot of time explaining the trade-offs between what an incumbent TPx solution can or cannot do.

Getting the word out is also a challenge. Periscope is very discrete about its client engagements because of its roots as a consulting firm. This makes it harder to expose the nature of how the solutions are being used within a given CG firm, given the breadth of the offerings. All of this creates some marketing challenges when Periscope's competitors are more liberal about discussing their customer situations.

TCO comparisons are also tricky. The Periscope approach is high touch and has many wrap-around services relative to others. This differs widely from a software-only approach that may have no provision for including data management and enrichment, insight creation, software, expert support, and capability building. This means that a TCO comparison has to include the entire stack with software, implementation, third-party services, and so forth. CG companies not willing to layer in all of this may experience "sticker shock."

**Adjacent offerings:** Assortment optimization/shelf management/visualization, remote retail monitoring, pricing management & optimization, eCategory management.

**Key differentiators:** Definitely the depth of the end-to-end offering of software and services as previously mentioned. Also, we see value as well as early-mover advantage in being part of the Nielsen Connected Partner network to leverage those data and insight assets - for both manufacturer as well as retailer perspectives. We also see Periscope as being a leader in pattern recognition through machine learning to help in answering the questions that people don't think to ask. Finally, the willingness to get their hands dirty on the data management and enrichment to ensure a more favorable output. We have seen too many TPO initiatives flare out due to the inability to get clean data to feed the models.

**Outlook & prognosis:** Because of the importance of analytics with a "tools plus services model," Periscope will continue to thrive. However, because of the level of services, the relative cost, and a focus on forming deeper relationships, it will not grow share like a tools-only player. Nevertheless, it will have global reach because of its McKinsey network and ability to work in data rich as well as data poor environments.

**Evaluate Periscope when:** You want an analytical suite as well as possibly a single component, like post promotion analytics. Also, when you want expertise and the ability to deploy globally but adapted to the local environment. Lastly, when you want analytical power without overwhelming users with complexity.

**Avoid Periscope if:** You want a transactional tool for funds and accruals management, or settlement. Or, if you just want software that you can manage on your own.

**Distinctions:** POI Best-in-Class for: Desktop UX, HQ Analytics, External Collaboration.

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**RI (formerly Retail Insight)** ri-team.com

**Customer profile:** A TPM offering from an analytics firm that enables consumer goods manufacturers, retailers, and brokers worldwide.

**Geographic presence:** EMEA (36%), AsiaPac (62%), LatAm (2%).

**Total consumer goods users (seats):** 625.

**Tiers represented:** Tier 2 and 3. Many are overseas affiliates of Tier 1 multinational companies.

**Solution offerings:** TPM.

**Major product sub-segments not covered:** Tobacco, consumer durables and semi-durables.

**Analytics:** Features many pre-configured, dynamic reports. Also, has established linkage to Tableau due to existing client usage, but is data agnostic. The analytical elements are in unique "decks," which form story boards. Has strong pricing tools as well as the ability to look at product mix. We liked the ability to toggle between a grid and a graphic based on preferences. Also, the scatter plot of events and ability to chart any P&L element. Users can click and drill on the dots to identify underperforming promotions. The "what-if" analysis in the form of a sales volume bridge is very cool. Nice ability to align daily/weekly data to the customer time frame because the data is built on a daily basis. Also offers new ways to access its cubes and flat files so that they have more flexibility to do analysis and are not at the mercy of back-end system. This also increases speed and reduces cost. Very financially oriented with full internal/external P&L on SKU or event levels with side-by-side comparisons. We rate it as Above Average.

**Configuration/Customization:** Customization is allowed.

**Technology architecture/delivery options:** Hosted/private cloud.

**Service partners:** Rackspace for hosting. RI does its own implementations through its offices in Bentonville, USA; the U.K.; or Singapore.

**Technology partners:** Tableau and High Charts for data reporting and visualization.

**User experience:** The current version includes many UX enhancements such as:

- A knowledge repository for past plans and events that is stored in a uniform format. Also a high degree of knowledge management of what happened in previous periods, and why.
- Tile-based navigation as a jumping off point for all business process areas related to promotions.
- Ability to click through from the calendar to the P&L or have it as a pop-up.
- Ability to plan at many customer levels and see the investment, expected ROI, and actual results at those levels.

The solution is intuitive, ergonomic and has a strong sense for process flow. In particular we like the "Learn, Plan, Track" orientation of the solution with corresponding tile-based navigation. We rate it Above Average.

**Vendor trend:** This is a vendor that is growing its voice in the marketplace because of its ability to work with both manufacturers and retailers, particularly in distributor markets. It has high client retention.

**Strengths:** Ability to work with manufacturers that go to market in multi-tiered distribution markets is unrivaled. This includes being able to handle all the distributor data that comes back from all levels. The management team is deep in industry experience and able to disseminate best practices. They also have an uncanny ability to sell to affiliates of Tier 1 multinationals that have a deep SAP footprint in other markets. Strong financial performance orientation and IBP analytics.

**Challenges:** They need to translate their expertise in creating baselines into a TPO solution that is predictive, rather than arithmetic and based on averages. Up until now this has not been a priority in the data-lean emerging markets but it is important for global expansion. Also, whereas the solution is strong on the planning portion of the promotion cycle, it has no provision for settlement in the modern trade through the deduction management process, but does have settlement for traditional trade through direct means.

**Adjacent offerings:** Remote retail monitoring.

**Key differentiators:** Strong expertise in the Asian market. Proven scalability as demonstrated by processing 3.6 billion records daily and working with several of the world's largest retailers. The remote promotion monitoring tool (Compass) is key to transparency in what actually gets executed in the marketplace and should be an embedded part of every TPM approach. Capture of comments and knowledge retention as part of learning and best practices are both deep and unique.

**Outlook & prognosis:** Given strong analytics, the remote promotion monitoring, and level of expertise, we see this as a very appealing option across multiple geographies.

**Evaluate RI when:** You want an analytical TPM solution, industry expertise, and proven ability to execute in AsiaPac.

**Avoid RI if:** You need a global deployment through a 3rd party, TPO, or settlement capabilities through an integrated solution.

**Distinction:** POI Best-in-Class for Financial Orientation/Simulation, Remote Monitoring.

**SAP** SAP.com

**Profile:** A global, enterprise software vendor with a large ERP install base and significant mindshare in the CG industry.

**Geographic presence:** North America (40%), Latin America (5%), Europe (45%), and Asia/Pacific (10%).

**Total consumer goods users:** 17,000.

**Tiers represented:** All.

**Solution offerings:** 10% of TPM users have TPO as well.

**Major product sub-segments not covered:** Tobacco, semi-durables.

**Analytics:** Continue to benefit from significant focus. The landing page is largely KPIs and each is drillable. This provides both insights as well as details in just one click. The ability to quickly specify the amount of detail on a P&L is very nice. Then the ability to see each of these elements on a line chart is very informative. When viewing a promotion, we liked the ability to see it as a graphic as well as all of the details on a grid. This greatly enhances the ability to do high and lower level analysis. Emerging capabilities in guided discovery are exceptional if not visionary. This includes everything from a high-level executive discussion to an interactive meeting with a buyer – and the graphics are really that good!

We also like the Smart Insights capability, which describes what a number means in words. At the other end of the spectrum is the inclusion of AI to provide pattern recognition and answers to questions that a user hadn't thought to ask. Being able to see baselines for multiple products is a plus. Having P&L by month as a graphical view is very nice. Seeing multiple scenarios side by side is not only powerful but the graphical renderings were very good. SAP has taken scenarios to a new level. We rate Analytics as Above Average across the board because SAP has greatly enhanced how the data renders as well its insightfulness.

**Configuration/Customization:** SAP provides customer exits for enhancing the solution without precluding upgrades. It is a platform that can be enhanced however the customer chooses.

**Technology architecture/delivery options:** On-premises or hosted/private cloud.

**Service partners:** PwC Strategy&, Deloitte, HP, AgilityWorks, IBM, Infosys, Knack Systems, Gruppo Asso, Teklink, Bluefin, 4brands Reply, Maihiro.

**Technology partners:** No dominant technology partners. SAP is hardware agnostic.

**User experience:** Continued focus on UX through HTML5, focus on ergonomics and visualization. Particularly noteworthy are:

- A highly interactive calendar that includes KPIs, great hovers, and the ability to put the prior calendar at the bottom of the page for reverence. Users can enter data into a hover.
- Chevrons give a clear sense for the process flow, approval status and where a user is in it.
- An optimizer that shows side-by-side scenarios as well as a graphic to show everybody's profit on the side.
- It has a new, cool way to visualize product hierarchies and drill into them as well as create custom roll-ups.
- A much more graphical orientation than ever before.

**Vendor trend:** The past 2 years have been very key for SAP as it has addressed every major shortcoming, more than captured its fair share of deals, seen key customers through the upgrade process without experiencing defections, and begun to flex leadership muscle. It listens to customers through multiple means and prioritizes the input for more frequent releases (2 per year). It has simplified pricing to 2-3 line items and is truly an out of the box solution as opposed to a framework or platform for co-development. The UX is now among the best, as is also the roadmap. Also noteworthy is offering a hub-and-spoke, two –tier trade management solution for smaller markets, which will allow CG companies to leverage existing investments while scaling down to meet distributor-centric needs.

Three years ago we were urging (if not criticizing) SAP to close the functionality and usability gaps. Now we find ourselves urging them to stay out in front and looking forward to discussions about the visionary elements of the roadmap.

**Strengths:** Product development is now a strength. It has shown that it can buckle down and deliver more, and in a shorter timeframe. Gone are the days of 4+ years from PPT to actual product. SAP is now a leader on the development side. It also has a vast service provider network, name recognition, and relationships with IT organizations.

**Challenges:** It will take some time to break the stereotype that SAP had for years, which was somewhere between stark and basic for TPx. Some of those CG companies have looked elsewhere, but there are Tier 2 opportunities where SAP can scale down and meet their needs with a modular product. Pricing commensurate with size will be key. However, having an out-of-the box solution greatly improves TCO.

We look forward to the day when SAP can sell outside of its own ecosystem. For now, it is positioned to increase this win rate. Another challenge is to simply stay focused on being a leader as it is a large and highly matrixed company.

**Adjacent offerings:** POS data management and cleansing, retail execution, supply chain management, IBP/S&OP, marketing automation, campaign management, ERP.

**Key differentiators:** The embedding of AI in analytics, optimization, and overall business process are unquestionably hallmarks of leadership. In fact, the way SAP delivers these unrequested insights through Smart Discovery is one of the coolest things we have seen in this TPx Panorama cycle. Other differentiators are the depth of expertise in the industry, number of trained implementation partners, and strength of the roadmap. For example, the work already done on the “conversational UI” (voice driven) is quite impressive.

**Outlook & prognosis:** We look for SAP to gain momentum like never before. And with its cloud offerings, we look for more movement down market to Tier 3.

**Evaluate SAP when:** You haven’t seen their TPx offering lately. Also, if you run ECC6 or S/4HANA and haven’t customized your data tables. This will lead to a much smoother and more as “advertised” integration. Finally, if you are looking for a TPx partner with a complete commercial vision for consumer goods, from demand creation to demand fulfillment to invoicing and beyond.

**Avoid SAP if:** You want cheap and basic TPx. Also, if you want a bundled offering of solution and services.

**Distinctions:** POI Best-in-Class for Field Analytics/Insight, Financial Orientation/Simulation, Post Event Analytics (through embedded Strategy& capabilities), Calendar.

**Sequoya** sequoya.com

**Customer profile:** A trade optimization and customer analytics firm combining technology, services, and expertise. Previously we considered it as more of a customer analytics firm, but the launch of the new 20/20 Platform makes it a complete TPO and revenue growth management offering with single sign-on and role-based log-in.

**Geographic presence:** North America (85%, of which 69% is in the U.S and 16% in Canada) and Latin America (15%).

**Total consumer goods users (seats):** Approximately 600, but current licensing arrangements do not allow for a precise number as they are enterprise level.

**Tiers represented:** All.

**Solution offerings:** TPO. Very limited TPM functionality by design, and only as a courtesy for customers that insist on it. The idea is to connect to existing TPM solutions via web services.

**Major product sub-segments not covered:** None.

**Analytics:** The new visibility metaphor is the dynamic ability to drill into data visually, from interactive waterfalls, instant volume decompositions, , to being able to view accounts relative to an "anchor" account, simply by dragging and dropping on the fly. We found this to be very insightful and unique for pricing and other analyses. As part of the expanded analytical charter, the 20/20 solution can pull spreadsheets or any other client assets/documents into the analytical ecosystem. Landscape is part of the overall 20/20 analytics platform and as such leverages the same modeled database as the other 20/20 modules, meaning analytics are consistent - and not just historically based reports, but forecasted as well. It also has a folder system rather than a cockpit. This makes sense because a single cockpit doesn't cover each customer analysis, but the folders are more like a project file that can contain whatever is important. We saw a demo that included 9 product categories. The folder metaphor worked very well for this example as opposed to multiple cockpits with different metrics or lenses on the data.

Any report can also be shared across the 20/20 platform. We also liked the ability to use arrows to indicate how a data point has moved over time. We found it to be the right blend of insight and power, but easy to glean the insights because of the way they are rendered. For example, it takes no training to understand a 2X2 matrix for ROPI (return on promotional investment) where the dots in the boxes correspond to win/win, win/lose, lose/lose and so forth. We also liked the ability to:

- Evaluate keeping the status quo, as in "if we do nothing," as a scenario for purposes of comparison.
- Graphically spot opportunities like when I'm subsidizing base price through EDLP.
- Show cross-elasticity graphically side-by-side to show which products it interacts with.
- Model the effect of a price increase across the entire category.
- Pivot a waterfall "due to" chart horizontally, not just from the top. Thus, the view could be based on customers, total business, SKUs and families, and so forth for an analysis such as volume de-composition.
- Refresh a customer and category model 12 times per year to ensure the tactics stay nimble.

As it is both insightful/powerful and renders very well. We rate it Above Average.

**Configuration/Customization:** All attempts are made to code/configure in a way that would not inhibit the upgrade path. So far this has worked, but an exception might be made. Sequoya will duplicate any existing analytical report in the 20/20 environment chart library with full automation and settings functionality.

**Technology architecture/delivery options:** One instance of on-premises. All others are private cloud, which is the preferred method. This can be in a single or multitenant environment.

**Service partners:** Sequoya does the bulk of its own implementation work from its offices throughout the Americas.

**Technology partners:** Liquid Web for hosting.

**User experience:** Has improved dramatically with 20/20. The folder metaphor really helps to organize the analyses. 20/20 is far superior to the grid that was utilized previously. From a usability perspective we like it much better because it really feels like a web app. It is a user-friendly and logical flow of understanding the insights and building a plan accordingly. In particular we liked the tile-based approach to selecting customers and products as opposed to from lists. Overall it is very graphical and only utilizes grids when absolutely necessary.

Sequoya has taken usability to nearly sublime levels with 20/20. We rate it Above Average.

**Vendor trend:** Investment in the product has been considerable and out in front of growth, which tends to be "land and expand." It has a seasoned and stable management team.

**Strengths:** Strong client retention; users come to depend on the insights and deepen their use of the solutions over time.

**Challenges:** There is still a tendency for power users to acquire and use the tool even though field personnel could also benefit greatly from it. Being an optimization company that has analytics wrapped around it will take time to register with many HQ users. The other challenge we see is that companies like Sequoya with solutions plus services and expertise do not experience meteoric growth. They often are brought in to mop up after "software only" solutions fail to deliver on their promises. Hence only a few power users on the solution so they can stay under the radar screen and not shine too much light on why so much was spent on the big software solution or custom app. Moving to enterprise licensing will help to allow the use of the tools to penetrate more deeply. Otherwise, the key challenge lies in finding prospects that are ready and willing to capture and act on insights instead of copying the trade plan from the prior year and running it again.

**Adjacent offerings:** Category management, shopper marketing, return on return on promotion investment analytics, and elements of demand planning.

**Key differentiators:** The depth of the insights and high touch client engagement model. These manifest themselves in three ways:

1. Client engagement is between Sequoya and the clients as well as between clients. User conferences are held twice each year for sharing best practices and as a forum for staying in touch with clients. Additionally, each client has dedicated strategic consulting support from the Sequoya analytical teams either on-site or from Sequoya locations. This delivers value as well as a means of staying in touch with client challenges and goals. Select clients also receive annual business planning workshops and mid-year reviews as a means of working side by side to deliver against their analytical requirements.

2. The orientation of the Landscape modoleas a dynamic lens into a series of promotional situations that become an analytical library. Each utilizes tools like waterfall and ROPI optimization to simulate and improve it through TPO capabilities.
3. Willingness and ability to change the platform. It is continuous improvement and in some cases, quite different, like the migration from legacy Sequoya to 20/20 that has recently occurred. Sequoya prides itself on constant product improvements as opposed to quarterly or bi-annual.

**Outlook & prognosis:** We see Sequoya becoming a global leader in the "expertise plus tool" space where it has positioned itself. That will mean steady growth as all deployments are through the high touch service model and entail winning one or two countries at a time as opposed to a shotgun deployment. Nevertheless, the approach is consistent with our POI research, which shows that finding employees with the right skill sets, managing through change with them, and being able to bring new employees on board when there is turnover, can largely be remedied through a staff augmentation approach along with a strong and friendly toolset.

**Evaluate Sequoya when:** You have a transactional TPM tool and wish to add significant pricing and promotional insights into the planning process by leveraging existing investment but adding TPO through a web services call-out. Also, if you are moving your applied insight capabilities from developing to emerging markets and want a partner that can accompany, if not facilitate, your doing so. Finally, if you want to bring experts into your process to assist or outsource portions of it.

**Avoid Sequoya if:** You seek basic trade management capabilities to execute or settle promotions. Also, if you really want an on-premises solution that you can customize, or are just looking for software that you can manage on your own.

**Distinction:** POI Best-in-Class for Desktop UX, HQ Analytics/Insight, External Collaboration.

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**TABS Analytics** tabsanalytics.com

**Customer profile:** An analytics and data management company.

**Geographic presence:** North America (90%), Europe (10%).

**Total consumer goods users (seats):** Approximately 500.

**Tiers represented:** All.

**Solution offerings:** TPO.

**Major product sub-segments not covered:** Tobacco and consumer durables.

**Analytics:** TABS is all about analytics. Its Total Insights product has the best dashboard we have ever seen because it is visually compelling, includes unique elements such as social "buzz" data, ads by banner, breakdown of sales volume data, demographics, and total share by retailer/online vendor. From there, it has the ability to drill into the details to understand every aspect of the business. It is truly "total business analytics." There are many other analytical insight capabilities such as:

- Understanding the impact of existing, discontinued, and new products on growth.
- Visually show changes in price elasticity.

- Leakage and slippage chart with causal factors to show not only where lost shoppers are going but why.
- Integration of panel data to marry sellout with behavioral data and better understand shopper dynamics.

Additionally, the All Outlet Visibility offering now leverages a recent acquisition of Pivotstream, a cloud-based big data management firm, to increase speed and data rendering through Microsoft Power BI. All Outlet combines eChannel with brick & mortar to better understand product performance dynamics in the marketplace with the inclusion of Nielsen, InfoScout, and survey data. This allows for segmenting (high/medium/low/extreme) stores with accompanying volume decomposition by store segment. Thus, it can track trends for brands as well as outlets for performance as well as emerging trends. Showing these trends in a word cloud is an appealing way to capture them. The example we saw focused on how preferences for certain ingredients drives to certain brands and then Google trends. This can make for better focus on promotional attributes by looking at these trends across the eChannel as well as regular retail.

For analytics we rate it Above Average. It is highly innovative, shows the insights in very consumable formats, and has deep insights.

**Configuration/Customization:** Customization is common due to how user organizations like to analyze their business.

**Technology architecture/delivery options:** Private and public cloud.

**Service partners:** Hybrid Intelligence, Cognizant.

**Technology partners:** Tableau, Microsoft, Alteryx.

**User experience:** Very strong UX and ergonomics, which continue to improve each year. The landing pages are exceptional. It is very graphically engaging but also offers grids by the side of graphics for those who prefer to view it more like raw data. It is also not complex. It has all the capabilities of a power user tool, but is intuitive and relatively simple. Inclusion of the presentation builder to facilitate turning insights into impactful materials makes life easier. Also, doing more in Microsoft Power BI will provide additional options on how data is rendered. We rate it as Above Average.

**Vendor trend:** The company is growing and profitable. It also has very stable management. The combination of these two elements has resulted in a consistent focus on product development and innovation.

**Strengths:** The depth of analytics and industry experience of key personnel.

**Challenges:** Competing with larger, IT-centric companies is difficult. During RFP processes people often don't believe that they can do what they say and for the quoted prices. They provide references that include some really big and respected names, but are still not believed. Hence, the biggest challenge is getting a chance to show what they can do. Additionally, TABS, like other companies that focus on macro as well as micro level insights, can be perceived as a power-user tool. In point of fact, there are many insights that are readily consumable by field personnel, and in very engaging ways, but companies still tend to keep the tool close to the top of the organization. This limits license revenue as well as cross-pollination as field users migrate to other companies with tales about "the great tool they used to have."

**Adjacent offerings:** Category management, retail store optimization, advanced marketing analytics.

**Key differentiators:** Speed and depth of data cleansing/harmonization in support of the equally deep analytics. Data quality is key to generating insights for a better promotion. Few vendors provide data quality services. We have seen TABS successfully take on data harmonization challenges after other vendors/providers have failed. The dashboards continue to be in a league all their own.

**Outlook & prognosis:** Continued presence and relevance as an analytical player and innovator into the foreseeable future. In many ways it could be argued that TABS is more of an enabler than an actual TPx vendor. This is because it has great focus on the data that is so essential to doing meaningful predictive modeling or post event analysis. There are many TPx options in the marketplace, and certainly TABS is one of them, but there are fewer offerings for data cleansing and harmonization. Thus, before any meaningful TPx work can take place, a firm like TABS has to prepare the key ingredient, the data. This is why we see TABS in more and more data projects of late and why it is a critical player in this space.

**Evaluate TABS when:** You want insights to make for a better promotion, plus services to help you along the way. Also, if you want unique ways of looking at business problems with a superior UX.

**Avoid TABS if:** You seek a TPM solution. TABS doesn't purport to have promotion execution or settlement. Also, if you need a global deployment.

**Distinctions:** POI Best-in-Class for HQ Analytics/Insight, Analytics Visualization, Dashboard.

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**T-Pro Solutions** t-prosolutions.com

**Customer profile:** A TPO and analytics company that is solely focused on improving promotional outcomes. It has come at the TPO problem directly as opposed to other vendors that have morphed into it from TPM or category management. Nevertheless, its clients have subsequently asked for some TPM capabilities over time, which we do not include in the ratings because it is more of a courtesy than a product offering.

**Geographic presence:** North America (99%), LatAm (1%).

**Total consumer goods users (seats):** 450.

**Tiers represented:** All.

**Solution offerings:** TPO. Most elements for TPM except for settlement.

**Major product sub-segments not covered:** Tobacco, consumer durables and semi-durables.

**Analytics:** The solution is oriented around post-promotion analysis and optimizing annual customer plans to company or brand objectives. Baseline/promoted analysis is the heart of the approach. And it is the accuracy of its baselines that is attracting clients who have found less accuracy elsewhere, which had previously distorted their approach to promotions. At present it is used more as a power user tool for guiding key accounts. The user has the ability to choose a number of weeks in the baseline, remove outliers, align the promotion to when it actually ran, and begin to do scenarios. It features many unique insight drivers, such as: viewing competitive baselines and promotions, predictions that include historical averages, having the system tell when the best time is to promote, and includes digital marketing causal data to simulate into the mix. We rate it Above Average.

**Configuration/Customization:** Customization is an option at an incremental cost. Any other modifications would be built into the core product at no cost to the client.

**Technology architecture/delivery options:** Public cloud on Amazon Web Services is the standard. It is a SaaS architecture that runs on any browser. On-premises and private cloud are both possible.

**Service partners:** None. T-Pro does its own implementations and training.

**Technology partners:** None.

**User experience:** The core of the application is looking at the baseline graphics for projected and historical baselines on promotions and then moving to the calendar for plan creation. T-Pro Insights is a light BI tool for visualization. It does not have significant dashboard-type functionality as the approach is to keep it simple. And it is simple and yet powerful — with emphasis on simple. A library of scenarios helps with plan creation. Guardrails about the appropriate components of a promotion guide the planning scenarios. The entire optimization input process can be done through a single pop-up; it is just that simple. The "Electronic Help" section further aids in getting users comfortable and doing so quickly. We found it to be exceptionally "flow" oriented - meaning very stepwise with the ability to drag a scenario into the plan. They really have made a complex process quite simple. As a result, we rate it Above Average.

**Vendor trend:** Despite being relatively young in the marketplace, the growth has been substantial with companies of all tiers. Product investment continues to be substantial and it shows. Plans to do more in category analytics will strengthen the value proposition.

**Strengths:** The simplicity of the planning process and high degree of usability cannot be understated. We believe that most anybody could learn the solution and begin using it in less than half a day. It is a highly entrepreneurial company and features a core management team with deep industry experience first, and technology experience second, as opposed to the other way around like we typically see.

**Challenges:** T-Pro does not offer a menu of system support or outsourced analytical services. So on the one hand it keeps T-Pro focused on the product but may exclude it from situations where a more bundled set of services is desired. Also, T-Pro prefers to connect to an existing TPM system and not directly to an ERP. The latter is possible, but it may become a question of cost to do so. But we have seen instances where TPM solutions are not integrated to their ERP, so this might necessitate integration work.

**Adjacent offerings:** POS data management and cleansing, elements of demand planning, master calendar that includes all historical and future planned sales/marketing activity.

**Key differentiators:** Unlike most TPx solutions, which integrate into an ERP system, T-Pro integrates into an existing TPM solution. Because it is designed to lay on top of a TPM solution and thus avoid integration with an ERP it reduces TCO and time to value. We like this approach because many of those TPM solutions were so expensive and painful to install that a substantial amount of infrastructure has been added around them rather than replace them. Simplicity is a big differentiator as well as some unique metrics such as "consumption to purchase index" (CPI) for to adjust for forward buy and diverting; and, "percentage base participation", which is a better indicator than ACV when promoting a single SKU. We rate it Above Average both for insight as well as how the insights are rendered.

**Outlook & prognosis:** Being able to add to existing TPM investment is a nice option. We actually see T-Pro winning against TPO vendors that already have their brand of TPM solution in place. This is a testament to the power and simplicity of the toolset. T-Pro has much to offer in the TPO space and we expect it to be a key player.

**Evaluate T-Pro when:** You have a TPM and want to add TPO. You prize simplicity but do not want to sacrifice analytical power.

**Avoid T-Pro if:** Your primary need is a TPM solution. T-Pro has all TPM functionality except deductions/settlement. Best to let it do what it does well. Also, if you are looking for a global deployment with local support.

**Distinctions:** POI Best-in-Class for Field Analytics/Insight, TPO Ergonomics.

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**UpClear** upclear.com

**Customer profile:** TPM vendor with a global footprint.

**Geographic presence:** North America (33%), Asia/Pacific (25%), EMEA (40%), and Latin America (2%).

**Total consumer goods users (seats):** 2,200.

**Tiers represented:** Tier 2 and 3. Many clients are affiliates of Tier 1 multinationals.

**Solution offerings:** TPM. TPO offered is through an embedded solution from Management Science Associates (MSA).

**Major product sub-segments not covered:** Tobacco, consumer durable and semi-durables.

**Analytics:** Are through Tableau, which is embedded. We like the tile-based orientation with a miniature version of the underlying report to aid in navigation. New functionality for top-down planning and budgeting are a real plus for visibility and accountability. The new TPO Toolkit also provides for the reception of key lift data and furthers both pre and post event analysis. It has good side-by-side comparisons of scenarios, excellent bubble charts to show key metrics like promotional ROI versus % incremental volume, and has drill down into nearly any graphical element. A report writer is included. The “due to” analysis is quite powerful because it shows a volume bridge that can include TV, radio, holidays, and most any other factor. It is one of the most analytically oriented “TPM-only” solutions that we have seen. We rate it Above Average.

**Configuration/Customization:** Customization is not an option at present, unless it is an evolution that aligns to the global roadmap. It looks to be more configurable than most solutions we have seen.

**Technology architecture/delivery options:** SaaS in a private cloud. Currently it is Rackspace but progressively moving to Microsoft Azure.

**Service partners:** Clarkston Consulting for SAP integration and change management; Infor for general partnering from ERP to joint product marketing /sales, and integration; Edenhouse and Pivot for SAP integration; Rackspace for hosting; Microsoft for technology and hosting.

**Technology partners:** Rackspace and Microsoft for technology and architecture. Infor as ERP partner/integrator. Tableau for data visualization. Dell Boomi for data integration.

**User experience:** The addition of traffic lighting and status icons to help a user quickly understand how a promotion is doing are nice. Dashboard notifications are also of benefit to the busy user by channeling focus. The calendar has also been dramatically improved to include more segmentation, visualization, competitor activity, and perform drag-and-drop activities. Overall the user experience is very modern and graphically oriented, and is easy to use. We love the ability to change a variable and watch the graph move accordingly. We also like the tile-based architecture and the dashboard is very nice. The Mobile BluePlanner for viewing and approving on mobile devices is also a real plus. The Intelligence product could be more graphical as we favor charts over Excel-like grids. Nevertheless, we rate it as Above Average for UX.

**Vendor trend:** The company is high-growth and has a stable management team despite its global expansion. It continues to grow the team and invest in the product. We like that they hire people with industry experience. It is also making inroads into Tier 1, which positions it very well to enable a multinational company in all markets, not just smaller ones.

**Strengths:** BluePlanner light for emerging markets. Everybody claims to be able to do rapid implementations, but these guys do it consistently. The company is also surprisingly "self-aware" when it comes to its relative strengths and weaknesses and is constantly working to improve them. The work done on the calendar is a good example.

**Challenges:** We don't see UpClear having significant challenges.

**Adjacent offerings:** Data management and integration.

**Key differentiators:** Expertise in emerging as well as developed markets. Most vendors are opportunistic about the former. UpClear does both very well. Recent deployments in Asia have given it more expertise in working through distributors and some unique functionality. This includes pushing budgets down to the store level, confirming promotional participation through the "WeChat" app and rolling the spend data back into BluePlanner for budgeting and invoice matching. Low deployment and ongoing costs relative to other solutions. This is an excellent "bang for the buck" solution. Microsoft Yammer is embedded for internal collaboration based on topic, distribution group, and includes notifications. We found this to be really cool.

**Outlook & prognosis:** UpClear has a tremendous upside and momentum as a global player.

**Evaluate UpClear when:** You want a really good user experience with global potential at an attractive price.

**Avoid UpClear if:** You want an on-premises solution you can customize. Also, if you have an immediate need for a proven TPO tool.

**Distinction:** POI Best-in-Class for Internal Collaboration.

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**visualfabriq** visualfabriq.com

**Profile:** An integrated TPM/TPO vendor with both manufacturer and retailer clients.

**Geographic presence:** Europe (75%), [South] Africa (25%).

**Total consumer goods users (seats):** 1,020.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco, consumer semi-durables and durables.

**Analytics:** Now delivers more market insight through template reports, which can be enhanced or altered. Each insight screen has a drag-and-drop option to assemble the perfect dashboard and the change is pervasive. The promo scatter chart is a nice way to look at the "Top" and "Flop" promotions in a matrix. It shows causal data such as forward buy in a graphical way. It has the ability to proxy a prediction based on similar promotions or solely based on historical data for companies that change their assortment frequently. It has waterfall charts for both the retailer and manufacturer perspectives. Post event analytics is very strong because of how it compares actual to expected, highlights forward buy, and provides a copy of the ad for reference. It is also fully automated. But in particular, we like how it graphically evaluated the promotion in addition to just the revenue/ROI data. Also, it has some unique KPIs, like "bang for the buck" ratio, to provide insights. It does volume prediction on the fly through standard machine learning. We rate it as Above Average.

**Configuration/Customization:** Customization is not currently an option. Client needs have been able to be met through development and the release cycle that is shared across the install base or through configuration.

**Technology architecture/delivery options:** All cloud-based, multitenant SaaS for functionality but database is individual. Hosting is with Amazon Web Services.

**Service partners:** PWC Strategy&, EyeOn, EOH South Africa, ATKearney.

**Technology partners:** Amazon Web Services for hosting.

**User experience:** Nice tile-based landing page. KPI trees are an interesting way to look at things because they provide a deeper view without drilling down. It is very graphically oriented with both charts and grids being exposed simultaneously based on preferences. The "ghosting" feature is also very useful. It allows a user to see the prior year or a competitor's promotions as a shaded box on the calendar. The planning process is very stepwise and a greyed-out box in the navigation panel always tells you where you are in the process. However, during basic navigation when you aren't looking at a graphic, it is quite monochrome. The ability to add a custom skin helps with this, but the screens could have a fresher look. Nevertheless, we rate it as Above Average on the strength of the ergonomics and some of the features that users will benefit from.

**Vendor trend:** Very positive growth trend and a strong roadmap going forward. Investment in people and product have been steady. The company has consistently been able to win deals with companies that have announced other vendors as the global standard. This is particularly true in the Netherlands. We believe that the work it is doing on machine learning will pay dividends as an early mover advantage.

**Strengths:** A very robust set of administrative tools that should allow the user organization to have full control of the solution. This includes the ability to get inside of the predictive models (like Python) using Jupyter to facilitate the modeling in a repeatable way. Ability to handle significant amounts of data. Everybody makes this claim, however we watched the system load 15,000 promotions in just 30 seconds. Visualfabriq acts like a very mature software company by offering 2 major and 2 minor releases per year. Similar offerings for retailers/gas stations and E-tailers keep it relevant to areas for collaboration.

**Challenges:** visualfabriq has tremendous passion for optimization and advanced topics but must also remain focused on those CG companies that use spreadsheets and just need to move to TPM. It also has the challenge of being a relative newcomer to the space, which can often favor larger, more established players.

**Adjacent offerings:** POS data management and cleansing, remote retail monitoring.

**Key differentiators:** There is a philosophy in visualfabriq that results from CG practitioners looking around the European market and not finding a suitable solution, then building one from scratch. The expertise and passion around machine learning to aid in the entire promotion cycle is noteworthy. Also, the willingness to offer a data load service is quite unique for a vendor of their size, if not for the market as a whole.

**Outlook & prognosis:** Given solid growth, excellent vision, clients of all sizes, and a strong/insightful user experience, we expect them to continue to be a very strong option for European companies or affiliates doing business there.

**Evaluate visualfabriq when:** You want a TPM/TPO combination that is strong in both areas from a company that has deep expertise in Europe and South Africa. Also, if you want to benefit early on from machine learning in the promotion cycle.

**Avoid visualfabriq if:** If you wish to customize and create a one-off solution or have an immediate need for a global deployment.

**Distinction:** POI Best-in-Class for Financial Orientation/Simulation, Post Event Analytics.

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**Wipro Promax Analytics Solutions (WPAS), a wholly owned subsidiary of Wipro Limited.**
promaxtpo.com

**Profile:** A global TPM /TPO vendor that is part of a global services and technology company.

**Geographic presence:** Europe (24%), AsiaPac (44%), North America (30%), Latin America (2%).

**Total consumer goods users (seats):** Approximately 5,200. Enterprise licensing does not allow for a precise count. 60% are estimated to be using TPM and 40% TPO.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco, consumer semi-durables and durables.

**Analytics:** It includes the full analytical stack such as multi-causal uplift models, cannibalization/halo effects, pre- and post-promotion evaluations, price/profit optimization, and predictive planning. It has some unique and insightful views and renders well visually. The limitation is that it only allows a user to optimize a single promotion. This will be addressed in the April, 2018 release along with constraint-based optimization. We like how it visually shows the gap between what I predict and what the system predicts. Cannibalization shows all brands hurt by the promotion as well as those benefitted, not just my own brands. We like the ability to look into the R models to see the data in a plotted line chart to get a better fit, grab outliers, and explain in text why they were removed.

We rate it as Above Average.

**Configuration/Customization:** Promax is a highly configurable solution. Customized product extensions are accommodated to some clients. This is happening less and less as the standard product continues to evolve. Nevertheless, it is open to discussion.

**Technology architecture/delivery options:** On-premises, hosted or public cloud.

**Service partners:** None at present.

**Technology partners:**

- Microsoft Azure and Amazon Web Services for hosting.
- SAP Hana and Demand Signal Management for co-development and co-innovation.
- Teradata for co-innovation.
- Opera Solutions for data scientist support.
- Retail Solutions Inc. for decision support.
- Microsoft Business Intelligence for reporting and visualization.

**User experience:** The TPM solution has seen significant enhancements to simplify the UX across the promo library, adding a snap buy period, revamping broker commissions/reporting, adding dated terms (like for a period of time), manager approvals through e-mail, and more. We like the ability to click on several events and sum them. Also, the ability to work on a scenario to where it is just right and click "publish" to push it to the TPM solution for execution. We still think that Microsoft Cortana integration could make for more interactivity and queries about functionality, navigation, or just allow users to talk to it and have it create a chart. For now, it is only used for report creation but we see many additional possibilities. It is ergonomic and favors field and HQ users. The combination of a dashboard with some KPIs is very nice in the tile-based navigation. It isn't elegant but it is very functional. We rate it as Above Average.

**Vendor trend:** WPAS has made acquisitions that will accelerate innovation. The ones we find noteworthy are Appirio for cloud application development as well as being the parent company for Topcoder, which outsources design/development/coding of applications. Also utilizing Wipro HOLMES (an AI platform) for automating the settlement process. It continues to acquire new clients and upgrade existing ones. This now makes several years of this positive trend. Plans to upgrade the UX more often and take optimization deeper show focus on the right things.

**Strengths:** An integrated, but also a modular approach to TPM and TPO plus the ability to deploy TPO on top of an existing TPM. We see considerably more of this in recent wins with several TPO deployments on top of SAP TPM, which is a major element of the current WPAS strategy for TPO. The ability to bring resources to bear quickly to address an opportunity in the product.

**Challenges:** WPAS part of a really big company. It is doing the right things; it just needs to keep up the focus and remember that consumer good companies respond slowly to even the coolest new developments. Therefore, it can't expect it to behave like financial services, healthcare, or some other sector.

**Adjacent offerings:** POS data management and cleansing, supply chain management, digital marketing, a new on-shelf availability and compliance offering.

**Key differentiators:** Length of experience as a combined TPM and TPO offering. Depth of data management and data science resources as part of a company with 173,000 employees.

**Outlook & prognosis:** WPAS is already a global player with a well-balanced client footprint. It just needs to continue to execute well in the marketplace, fulfill its roadmap, and move to the front of the innovation line.

**Evaluate WPAS when:** You want a combination of global support, potential for deep services, multiple delivery options, good quality TPM and TPO in one, and industry expertise. Additionally, if you have a TPM investment that you don't want to walk away from, but wish to add TPO.

**Avoid WPAS if:** You really want a third party services provider for deployment/ongoing support that is not Wipro.

**Distinction:** POI Best-in-Class for Calendar.

## Conclusion

Managing trade promotions is mission critical in reducing unproductive trade spending as a means to improving revenue and profits for both manufacturers and retailers. TPM is a very mature space that offers relatively low risk for CG companies that are looking to adopt it. Additionally, there is the less mature, but highly impactful, area of TPO. The options run from solution-only to having all sorts of services options and architectures from on-premises to cloud. And, they are available from vendors with local expertise and presence. The POI's overarching recommendation, however, continues to be that CG companies seek out the solution(s) that will move their field sales personnel beyond transactional and enable them to "sell more, and do so more profitably" thus creating a competitive advantage.

## About the Author

Dale Hagemeyer leads the research, best practices, and advisory function at POI and has been active on the POI Board since its inception. Previously, he was a research vice president and managing vice president at Gartner for 15 years. There, he did research in the application of technology to the business processes of trade promotion and field sales automation for consumer goods manufacturers.

Prior to Gartner he spent 14 years in management positions related to the promotion and distribution of products at Sunbeam Corporation, The Quaker Oats Company, PepsiCo, Kraft Foods, and Kroger. He also fulfilled an international assignment in Mexico from 1995 to 1996.

He has served on various industry advisory boards for trade associations and industry periodicals. He holds an undergraduate degree in finance from the University of Utah and an MBA from the University of Chicago.

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## About the Promotion Optimization Institute

POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving the promotion and distribution of consumer goods. Members of POI share cross-functional best practices in both structured and informal settings.

Additionally, members benefit through our industry alliances, the Certified Collaborative Marketer (CCM)™ program, and industry-leading summits around the globe.

POI aims to instill a financial and metrics-based discipline not typically found with other trade groups. The goal of our innovative approach is collaborative promotion optimization. The focus is on the customer/shopper through sales, marketing, and merchandising strategies.

Executive advisory boards keep us apprised of industry needs and help us provide desired outcomes for members, sponsors, and academia.

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