



Promotion Optimization Institute, LLC

POI TPx Vendor Panorama 2018

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Introduction

The Promotion Optimization Institute (POI) continues to focus on improving the trade promotion process in all of its aspects. While this continues to be an industry challenge, from 2017 the annual POI Survey data shows an uptick in satisfaction in the ability to manage trade promotions. This is significant after it had continuously declined during the previous two years. We attribute the change to a continued focus and taking a pragmatic approach to enabling the processes that includes not only the underlying technology but also securing support services and best practices where appropriate. 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 because brick and mortar experiences are still highly relevant. No doubt they are evolving with eCommerce formats such as Amazon, but TPx will remain highly relevant into the future.

Therefore, this document is designed to highlight the technology and related service options that can help to improve promotional outcomes. In short, it is a guide to help consumer goods (CG) manufacturers as they seek to acquire, upgrade, or geographically expand their TPx capabilities.

Scope of this Analysis

This document builds upon research in the POI Retail Execution Vendor Panorama, which was published in March, 2018. 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 sales planning and trade management efforts that involve the retailer at the HQ level. 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, enhance trading partner relationships, and drive profitable growth. In this document we evaluate the TPx market and some of the vendors that enable this key set of capabilities. 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 this installment of POI's research are as follows:

- Data quality and integration are big challenges to the promotional cycle. This manifests itself particularly in the areas of post event analysis, gleaning macros insights, and performing predictive analytics about promotions. In the 2018 POI survey, 80% of respondents stated that they do not have issues with integrating 3rd party data such as POS. We continue to see a strong correlation between companies that are satisfied with their promotions and their ability to bring external data into the process. While many TPx offerings include data management, many do not. This is a key differentiator in vendor support and, ultimately, in the quality of promotional outcomes.

- There is modest 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.
- TPx is becoming more of a subset of emerging revenue growth management (RGM) initiatives. We applaud this trend and the role of these types of analytics across multiple disciplines within CG.
- Artificial intelligence (AI) has considerable interest among vendors, and we are beginning to see instances where it is being brought to bear in a way that impacts promotions and promotion effectiveness. We believe that AI has tremendous potential and look forward to it having a greater impact in the future.
- Issues persist relative to true collaboration. 90% of survey respondents said that they have issues with getting retailers to execute agreed upon promotional plans. This percentage remains unchanged from last year. Predictive tools available in this space today that show promotional outcomes and their financial impacts on both parties can help to reduce this level of noncompliance by increasing retailer “buy-in.”

Recommendations

POI suggests the following strategies for improving your trade promotions:

- Seek to enable all of your trade promotion related processes with technology. 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 91% 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, the possibility of “multiple versions of the truth,” and increases the chance for errors.
- Prioritize functionality above delivery method. The lines between SaaS, managed services, hosted private cloud, and public cloud are blurrier than ever. We believe that having the right functionality to deliver insights and build more effective promotions is much more important than how a technology is delivered. Furthermore, as POI watches trends in the industry, there is a significant movement towards the cloud.
- Select capabilities that will help users to be more effective and efficient. Otherwise, why spend the money? 92% 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.

Improving efficiency and effectiveness of promotions can't be done in a silo. It needs to be a holistic transformation of people, process & systems across the Enterprise.

- Ask for best practices from your vendor. The POI 2018 Survey found a wide disparity between expectations for best practices and what was actually delivered. Many vendors can help to assess current gaps in your processes, enable best practice discussions, and facilitate gap closure efforts. This is a differentiator amongst the vendors and critical to improving your promotional execution. Also, find out the background of those who are expected to deliver them to ensure that they are indeed subject matter experts. 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 vital.

Market Overview

This is a critical time in the marketplace because many ongoing issues like effectively managing trade promotions still persist. Additionally, there are changes in market dynamics with blurring channels and ecosystems. We note some of the following trends, which merit focus from CG manufacturers:

- More solution options exist than ever before. In this report, we have evaluated a total of 23 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 unsetting 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.
- Post event analysis is often overlooked or an afterthought when considering the entire trade promotion cycle. However, we have seen this addressed more recently as either something requiring a specialty tool or as having higher weight in the selection process. Because most CG companies are only able to evaluate the top 2-3 promotions at their key 5 vendors, you have an opportunity to gain a competitive advantage by evaluating a greater number of your promotions.

Consumer buying behavior and the market landscape have dramatically changed. What are you doing to proactively and agilely prepare your organization to lead and win?

Evaluation Criteria

The Promotion Optimization Institute recommends using this TPx Vendor Panorama to narrow down your options and thus simplify your selection process. Geography is the first criterion to evaluate. If you operate in a specific set of geographies, narrow your search based on vendors that deliver desired capabilities in those regions. Then determine whether you seek TPM, TPO, or both. This will further narrow your search. Next, consider what combination of software and services you seek. We point to these three criteria (geographic presence, TPx capabilities, and software/services combination) because they are relatively concrete and not subject to much perception. It will also narrow the field considerably for you to a more manageable few. Thereafter, 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.

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.

When evaluating vendor partners, start with your company's business case and specific needs as the filter to narrow down vendor options and simplify the selection process.

Partner Leverage

This is the demonstrated ability to form and execute meaningful partnering relationships across the breadth 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 six key customer-planning functions, with a complete solution that meets market requirements for each function:

- Strategic and account planning.
- Promotion planning and budgeting.
- Calculation 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.

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.

POI is thrilled with the advances the vendor community has made in the last few years. The vendors continue to advance foundational elements, planning workflows and are leaning into new technologies like machine learning, AI etc.

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 some 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	Ability to approve, tweak, monitor, or perform minor functions on a promotion while on the go.
Desktop UX	Kantar, Periscope, Sequoya	Drives engagement from users and reduces administrative burden.
HQ Analytics/Insight	Data Ventures, Periscope, Sequoya	Insight is the currency of collaboration and a primary differentiator.
Field Analytics/Insight	AFS, Exceedra, SAP	Enabling field personnel to build and execute a better promotion by having the key insights available how and when they need them.
Financial Orientation/simulation	Exceedra, RI, SAP, visualfabriq	Financial accountability, customer P&L management with an RGM focus.
Post Event Analytics	T-Pro, visualfabriq	Automated post event “what-if” analytics to drive enhanced promotional effectiveness.
Collaboration • Internal	Accenture, Acumen, UpClear	Holistic company engagement to leverage enterprise insights, gained by the use of core capabilities, results in increased buy-in from cross-functional partners.
• External	Adesso, Periscope, Sequoya	Collaboration between vendor and manufacturer &/or retailer for continuous improvement.
Analytics Visualization	Kantar, Sequoya	A good graphic or image says it all.
Dashboard	Accenture, TABS	Dashboard with standard yet flexible business measures. It is also the launch point for further drill down.
TPO Ergonomics	Exceedra, Kantar, T-Pro	TPO can be complex with all the constraints and simulation. It has to be made easy.
Calendar	Accenture, SAP	An intuitive calendar is a focal point of the plan. It has to be visual, informative, and easy to change or drill down into the promotions.
Remote Promotion Monitoring	Data Ventures, RI	Need to be able to remotely monitor the promotion in flight as a dashboard element in TPx in order to better take action.
S&OP Capabilities	Blueshift, Exceedra	Collaborating with trading partners to make TPx a more outwardly focused process.
NEW Data Management	Data Ventures, TABS, T-Pro, Sequoya	Internal and external data is key to processes such as post event analysis and doing predictive modeling. However, to do that you need to acquire, cleanse, harmonize, and stage the data first.

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 2018.

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	◐	○	◐	○	●	◐	◐	◐
Adesso	●	●	◐	◐	●	●	●	◐
AFS Technologies	●	◐	●	●	●	●	◐	●
Blueshift	◐	◐	●	◐	●	●	●	◐
CPGToolBox	◐	○	◐	◐	●	◐	○	◐
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
Effectmakers	○	●	◐	◐	●	●	○	◐
Exceedra	●	●	●	●	●	●	◐	●
Flintfox	●	●	◐	●	●	●	○	◐
Kantar Consulting	●	●	●	●	●	●	◐	●
Nielsen	◐	●	◐	◐	◐	●	●	◐
Periscope By McKinsey	●	●	◐	◐	●	●	●	●
RI	●	◐	●	◐	●	●	○	●
SAP	●	●	●	●	●	◐	●	●

● = 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
Sequoia	◐	●	●	●	●	●	○	●
TABS Analytics	◐	◐	◐	◐	●	●	○	●
T-Pro Solutions	◐	◐	●	◐	●	●	◐	●
UpClear	●	●	●	◐	●	●	●	◐
Vistex	◐	◐	NEW	◐	◐	●	○	◐
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	●	●	●	●	●	●	◐	●
Accenture Cloud TPM	●	●	◐	●	●	◐	◐	●
Acumen	○	●	◐	◐	◐	●	◐	○
Adesso Solutions	●	○	●	None	◐	●	◐	●
AFS Technologies	●	●	●	None	●	●	●	◐
Blueshift	◐	●	●	◐	◐	●	●	●
CPGToolBox	●	○	●	None	◐	◐	○	●
Data Ventures	●	●	◐	●	◐	●	●	●

● = Above average
 ◐ = Average
 ○ = Below average
 None = No Capabilities Currently Offered

Product Assessment								
Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	TPM Functionality	TPO Completeness	User Experience	Analytical Capabilities	Product Vision	Configurability
Effectmakers	●	●	●	None	○	○	○	◐
Exceedra	●	●	●	●	●	●	●	●
Flintfox	◐	●	◐	None	○	●	●	●
Kantar Consulting	●	●	●	●	●	●	●	●
Nielsen	◐	○	None	●	●	●	●	◐
Periscope By McKinsey	●	●	◐	●	●	●	●	●
RI	●	◐	●	None	●	●	◐	◐
SAP	●	●	●	●	●	●	●	◐

● = Above average
 ◐ = Average
 ○ = Below average
 None = No Capabilities Currently Offered

Product Assessment								
Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	TPM Functionality	TPO Completeness	User Experience	Analytical Capabilities	Product Vision	Configurability
Sequoia	●	●	None	●	●	●	●	●
TABS Analytics	●	◐	None	●	●	●	●	●
T-Pro Solutions	●	●	◐	●	●	●	●	●
UpClear	●	○	●	None	●	●	◐	●
Vistex	◐	○	●	●	○	○	◐	◐
visualfabriq	●	○	●	●	●	●	●	◐
WPAS	●	●	●	●	●	●	◐	◐

● = Above average
 ◐ = Average
 ○ = Below average
 None = No Capabilities Currently Offered

Analysis of Representative Vendors

Accenture CAS and Accenture Cloud TPM accenture.com/cpgsolutions

Profile: Accenture has two TPx solutions that are part of the global Accenture Software division that leverages both software and services.

Geographic presence: North America (72%), Latin America (5%), Europe (19%), Asia/Pacific (4%).

Total consumer goods users (seats): 18,738.

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 Accenture CAS on-premises solution continues to benefit from development through the influence of ongoing as well as recently acquired CG clients. It has deep analytics for field users and their managers. It is also visually compelling. The analytics are delivered through the application, as part of the KAM cockpit, and through reporting or alerts. It is a nice balance. The KAM cockpit continues to be one of the best for how it renders data. It is very web-like in orientation (as opposed to grid-like) with an excellent landing page. The solution does not offer much for HQ staff in sales support, revenue management, or category management, but this is consistent with most TPM/TPO offerings that are oriented to field users. 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. It is exceptional in its usability and portability. POI rates the Accenture on-premises solution as Above Average.

The Accenture Cloud TPM has effectively closed many gaps in terms of critical features and functions required by the market. In particular, it now offers a payment/settlement module that further closes the loop on the promotion cycle for post event analytics. The analytics in general have also improved dramatically with or as an add-on through Wave Analytics. We particularly like how Chatter is nicely embedded as a way to share best practices and leverage the power of the extended enterprise. It has an exceptional calendar, which segues to insights through drill down filtering. A user can quickly reset the filter for an 18-month rolling plan view and also see which promotions are committed. A new cross-brands view enables multiple accounts and brands on the calendar view to see if your “own brands” are self-competing. It has an exceptional business scorecard with smart tiles that provide both navigation and KPIs. 2018 has been a pivotal year for analytics in the Accenture Cloud solution because of the expansion beyond an initial charter customer to include several others that will push for more and deeper analytical options that also leverage more machine learning and AI, which has been available but not fully utilized due to immature demand. In the near term, the Accenture cloud product needs to be enhanced to include post event analytics which is a critical analytical process. Post event analysis is currently offered as part of a separate product called iRGM with visualization through Wave Analytics or another such tool, but does not have its own visualization capability. We would like to see it embedded as part of a promotion cycle flow, and without having to purchase the iRGM for analytics tool plus another for visualization. As a result, POI rates Accenture Cloud Analytics as Average.

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

Configuration/Customization: The on-premises offers code-based customization if desired.

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.

For both solutions there are modules that can be enabled or disabled using configuration tools as well as adapted at the business process level.

Service partners that have deployed in the past: Accenture, Strategy&

Technology partners:

Accenture Cloud TPM: Salesforce.com for technology and hosting. Heroku (owned by Salesforce) as the Accenture Cloud Processing Service for TPM.

Accenture CAS: Microsoft for underlying technology and hosting. Amazon Web Services for hosting.

User experience: The Accenture offerings continue to have a superior UX. This continues to be true after migrating from Silverlight to HTML5 for the on-premises product and also by utilizing the Salesforce Lightning and Wave Analytics products more fully. We simply don't see other products that utilize Salesforce getting this quality of UX. The only minor criticism of the UX is that some of the very detailed drill down screens can be a bit grid-like. This is a matter of taste. Some users prefer a UX that is more like Excel. POI, however, favors a combination of grids with charts to support them for people who prefer to see results graphically as well as in a grid form. POI continues to find that planning based on attributes instead of complex hierarchies and smart KPIs based on what the user happens to be doing at the moment are a great boon to users and a differentiator for the Accenture Cloud offering. We also like the

ability to build a promotion and forecast it at the overall promo level and then allocate it down to the individual SKUs in the event. Overall, the cloud UX is strong, smart, and ergonomic in how it renders on the screen. POI rates it as Above Average.

For the on-premises product, it continues to see the benefits of development efforts around HTML5 as previously mentioned. It is highly intuitive, has an excellent landing page, and the UX is largely “modern” in that it renders more like a webpage than a grid or spreadsheet. We find it impressive that the on-premises TPx solution has had a superior UX for at least 20 years. This, coupled with the fact that the product will be supported into the foreseeable future, should speak volumes to both users and prospects. Clients will be able to improve user adoption and reduce the perceived burden that has been pointed to in our POI surveys. Some solutions wax and wane, but the Accenture CAS solution continues to set a high standard for UX. Highlights include intuitive calendaring, ergonomic creation of promotions, performing promotion optimization with a minimum of screens, and compelling dashboards. POI rates the on-premises solution as Above Average for UX.

Vendor trend: Accenture continues to have strong momentum in its on-premises solutions and has ramped up wins for the Accenture Cloud TPM product. This is critical to staying relevant. 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. We believe that the two-pronged approach of offering both cloud and on-premises with strong analytics and UX should be very attractive going forward. The only limiting factor is that Accenture is primarily focused on Tier 1 companies. Accenture Cloud Release 7, however, will be a significant milestone, because it will reduce TCO while increasing innovation (and as a result, gain relevancy with potential Tier 2 clients). Key elements also on the roadmap include deeper analytics, more flexible KPI visibility, claims automation, voice guidance, long-term agreements, and wholesaler/indirect planning.

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. The Einstein capabilities offered by Salesforce appear to be ready for prime-time scenario building. 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. The roadmap is very robust and past history has shown a strong ability to innovate and keep the UX on the cutting edge.

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 focus on Tier 1 companies and reliance on Accenture to provide the implementation services for the Accenture CAS product. Accenture has deep experience but there are always situations where other options are sought. It will also need to focus on reducing TCO and moving down market to Tier 2 and smaller affiliates of Tier 1 companies.

Accenture Cloud TPM will need to focus on demonstrating that it has a mature and viable solution after several years of being a work in process.

Adjacent offerings: POS data management, data-cleansing services, food services, shelf management/visualization, retail execution and monitoring, digital merchandising.

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. 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. We think that using Chatter to leverage peers is relatively uncommon. 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 3 years since the announcement to work with Salesforce. 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 it 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 that has not waned over 20+ years. Also, if you seek innovation with a blend of on-premises and cloud around the world based on your 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 for basic needs such as planning and funds management.

Distinctions: POI Best-in-class for Mobile UX, Internal Collaboration, Dashboard, and Calendar.

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 12 years.

Geographic presence: North America (1%), Latin America (4%), Europe (60%), AsiaPac (35%).

Total consumer goods users (seats): 650.

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: Acumen is first and foremost a services firm. Each client gets 8-10 reports. The rest are built for them. Currently in User Testing Phase Analytics will migrate to Microsoft Power BI, which will give users many more options to create their own reports. The dashboard is tile-based, which we like. From there it has the ability to drill into the details to see graphics as well as see the numbers. Out of the box analytics comes with 8-10 standard reports and Acumen and the user can develop more. Acumen believes in the governance of reports

and inculcating best practice as they are working with a client. While they offer flexibility in reporting, they are also focused on optimizing the promotion management process and helping clients develop “focused reporting” to answer the most important business questions. They work with the client to build new processes and guidelines for the teams to drive insights out of the promotion learning. Acumen also has solid P&L views for analysis and driving internal and external JCBP conversations. It has good capabilities for identifying underperforming promotions graphically and then drilling into the details. In particular we like the ability to lasso a group of dots on the matrix and then drill into them, and also the graphical ability to look at claims and their aging. Promo coefficients can be generated by the tool or else imported. Optimization through machine learning and/or linear programming is available but not yet fully productized. POI rates it as 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 Azure hosting, Telerik, RippleRock, Nfocus, LifeLineIT, Mongo, HeadforCloud, CN Group, Vitamin C Ltd.

User experience: The solution has improved significantly since our last report. It is more graphical and ergonomic. The calendar is improved as well as baseline/promoted visualization. The calendar 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. Overall, POI rates it as Average, but we believe that that another year of development as per the roadmap could make it more differentiated.

Vendor trend: Acumen is a global, specialized firm. Its focus is on client retention, but as a result, only achieves modest growth year-over-year. It appears to be able to be quite nimble as evidenced by the improvements in UX.

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 offices in the U.K. and Singapore. It is a company that is content to be focused on providing broad services to clients looking for the same. It faces less competition in Europe than a similar firm would face in another major market like the U.S. It is more guarded about its stature and client base than most companies we encounter, which we believe makes it harder to attract new business.

Adjacent offerings: POS data management and data cleansing, demand planning, price management, and trade terms re-engineering.

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 as 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.

Finally, the depth of engagement through a suite of services is quite compelling and detailed to ensure that people understand and utilize the solution. The depth of the curriculum and feedback loops with users are quite impressive. Also, the ability to benchmark with other clients within a set of processes aids along the journey.

Outlook & prognosis: We believe that Acumen will remain a specialized 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. The migration to Microsoft Power BI will lower TCO and provide more autonomy. Building in predictive models as more of an out-of-the-box offering will be critical to gaining momentum, but getting a voice in the marketplace is paramount.

Consider Acumen when: You need help getting started on the TPx journey across multiple geographies, 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 have an immediate need for very robust predictive modeling.

Distinctions: POI Best-in-class for Internal Collaboration.

Adesso Solutions adessosolutions.com

Profile: TPM and related services 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 7,000. 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, analytics, and related services.

Major product sub-segments not covered: Semi-durables, tobacco.

Analytics: The analytics have been enhanced substantially since the last report. They are now a standard package that are role-based for both dashboards and reporting. The dashboards enable click-through into the underlying modules. The email alert capability allows for analytical and general collaboration outside of the TPM system because they are logic and exception-based. Another analytical boon is the ability to create user-specified customer hierarchies for classes of trade, wholesaler relationships, or whatever. These can be used for building plans and reporting. The same is true for product hierarchies. In both cases it is drag-and-drop.

POI has 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 characterize the analytics as insightful and succinct. 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. The only drawback is that the dashboards are not configurable except by Adesso in order to keep the solution cost effective. POI continues to rate Adesso Analytics 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 single or multi-tenant SaaS in a private cloud.

Service partners: Adesso does its own deployments.

Technology partners: Microsoft for Azure storage, DocumentDB, and Virtual Machines components. On-line Tech for multi-or single-tenant hosting, depending on client requirements. Telerik for internal controls and dashboarding. Also, Dell and On-line Tech.

User experience: The UX has also improved significantly from last year. It is more graphically oriented. The ease of taking data into the “Offline Planner” is noteworthy. It is intuitive and easy to use. The hovers in the dashboard are concise without being overly detailed. The deal calendar is color coded based on deal status and users can edit a deal right from the calendar. The ability to instant message peers from within the system is a real plus for harnessing the power of the enterprise. For usability, POI rate Adesso UX as Above Average, due the recent enhancements in dashboards, reports, and usability.

Vendor trend: Adesso is a steady, if not strong growth vendor, particularly in the SMB and natural foods market with a TPM-only solution focused solely on the North America. It is a relatively low-cost solution and one of the longest standing in the cloud. Client upgrade activity continues to be strong as a sign of satisfaction and commitment. The additional services around access to industry experts and outsourced system administration are a real plus and improve client satisfaction.

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 have the candor to recommend waiting as opposed to closing the deal. We also like the way the

company seeks to enable interactions between user organizations at its own seminars or other events to facilitate best practice transfer.

Additional strengths include:

- Breadth of ERP integration instances. By our count Adesso has been connected to 13 different brands of ERP solutions.
- Pre-built, out-of-the-box QuickBooks setup for the natural-organic segment.
- 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.

Challenges: The Adesso challenge continues to be convincing prospects that a TPM solution is both affordable and superior to spreadsheets. 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.

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 potential clients 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. Continued evolution of the food service offering beyond 85-90% complete will provide yet another growth avenue. The same can be said for the training and diagnostics and outsourced system administration services. The sweet spot for Adesso will continue to be the combination of software and services.

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 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.

Distinctions: POI Best-in-class for External Collaboration.

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): 29,555.

Tiers represented: Tier 2 and 3.

Solution offerings: TPM.

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

Analytics: Exception-based reporting that includes recommendations about what action should be taken takes AFS to a new analytical level. POI also likes the ability to create and push specific reports to specific people or groups based on a predetermined schedule. Overall analytical capabilities are based on Microsoft's analytical stack and offer greater access to insights. The dashboard is visually pleasing and works nicely as a landing page with KPI and alerts that are configurable by the user and by specific roles. AFS has a shared report library. Reports can be scheduled, published, and/or pushed to users as a link or actual Excel doc. The reporting cube has actuals at the day level and can easily convert to graph formats and publish to others. There are 553 measures in the tool for users to utilize. The filters and report layouts are intuitive and much improved over prior years. 6 standard reports are ready to be utilized day 1. One insightful feature is the ability to understand what trade spending is at any point in time. POI rates the overall analytical abilities as Above Average as it is powerful and insightful.

Configuration/Customization: It is a multi-tenant solution. Client specific functionality can be developed as enabled functionality for all clients to turn on.

Technology architecture/delivery options: SaaS through private cloud, built on the Microsoft technology stack, and on premises.

Service partners: AFS does most of its own implementations. In the past it has implemented through Alvarez and M, but is open to using other services organizations as well.

Technology partners: Microsoft Azure and Rackspace for hosting. TPO through T-Pro partnership and analytics. AFS and T-Pro have taken partnership to the next level with the ability to get optimization through T-Pro Solutions with a single sign-on. POI saw a streamlined planning experience where a user clicks a simple button on the AFS dashboard to utilize the T-Pro module (no different than a vendor that optimizes their model on a separate server). ROI analysis is completed with the optimization work in TPRO, so all promotions that are sent to AFS are efficient. Optimized promotions created in T-Pro are sent back to AFS through a web-call that automatically builds the promotions in TPM. Companies can utilize TPM first and then turn on the TPO at a later time. The AFS/T-Pro relationship provides flexibility and builds on the expertise of both companies.

User experience: POI likes the dashboard landing page as it can be configured to the individual user level. The calendar hovers are very nice and clean, and users can drill down directly from the calendar into a promotion to view or edit the selection. The calendar is

visible in multiple views that can be exported to Excel or PowerPoint. Promotions created directly in the AFS system will pre-populate as much of the promotion detail as it can, reducing administrative burden (rate, spend, and fund types based on historical “like” promotions). We like the “string of pearls” approach to stepwise navigation through the process. The automated deduction clearing and UX has a nice graphical appearance vs. just green screen is very good. This will advance the speed of deductions clearing. The 24x7 user helpdesk is a real plus as users need to gain resolution when issues arise- at any hour. POI rates it as Above Average.

Vendor trend: Overall trend continues to be positive and the AFS is growing organically by winning new clients. The company is investing in the TPx product and partnering for capabilities like TPO. Client retention is strong and senior leadership is stable.

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 aren’t any significant deficiencies. Many vendors with Best-in-Class distinctions in some areas 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 additional third-party implementation partner options. This will need to be addressed as AFS continues 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. The partnership with T-Pro & the TPO capabilities enabled opens Tier 1 markets and new capabilities to AFS and its users.

Evaluate AFS when: Your company is looking for a solid trade management system with the flexibility of layering in TPO easily when your organization is ready. Also, evaluate AFS if your organization sees 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/Insights.

Blueshift blueshift.com.au

Profile: An Australian vendor coming at the TPx space from integrated business planning, which includes demand planning (S&OP) 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. Enterprise licensing structure does not allow for capturing a specific user count.

Tiers represented: Tiers 2 and 3. Several are AsiaPac affiliates of multinationals, but due to their size POI considers them to be Tier 2.

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 has set 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, which enable users to generate reporting. 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. Also noteworthy is a scenario modeling capability, which allows users to do promotional mix modeling using manufacturer and retailer P&Ls. However, there are some developmental opportunities, including cannibalization and halo effect, that are critical to accurate ROI and collaborative joint business planning. Therefore, POI rates Blueshift analytics as Average.

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 Microsoft Azure.

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

Technology partners: Microsoft, DevExpress, SciChart, SSW (technology best practice consulting), Automatic Studio (UX design), and MemSQL.

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. POI rates 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. Incremental R&D investment over the last 2 years for in-memory, big data architecture needed to power S&OP plus TPx is and will continue to pay dividends in performance. POI is looking forward to witnessing future improvements as the company is turning its attention to enhancing the UX.

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, so it will have to develop some marketing muscle to get mindshare in these highly competitive markets.

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.

CPGToolBox cpgtoolbox.com

Profile: A global TPM offering architected on the Salesforce.com platform.

Geographic presence: North America (60%), Latin America (15%), Europe (11%), and Asia/Pacific (24%).

Total consumer goods users (seats): Approximately 775.

Tiers represented: Tier 3. Many are affiliates of multinational companies, but the largest single client instance is only 120 users. Most are below 50 users.

Solution offerings: TPM.

Major product sub-segments not covered: Tobacco.

Analytics: Improved and more extensive dashboards are a real plus. Optimization capabilities through Salesforce Einstein are coming online at this writing. They will be intriguing because it is flexible enough to even optimize in the middle of an event. There are many standard reports. CPGToolBox visualizes the data but doesn’t present it in a visually robust way, or have any unique KPI’s or insights. POI rates CPGToolBox as Average both for insightfulness as well as how the data renders. It has improved, but still not to the next level.

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

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

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

Technology partners: WalkMe, Conga, Plex.

User experience: UX has benefitted from learning to get more out of the Salesforce Lightning toolset. Having more dashboard options is great, but a user has to scroll down to view them as opposed to having them more compressed and ergonomic. There is the ability to do some configuration at the user level, which POI likes. Overall, the UX continues to improve, but it is still very monochrome and “gridlike.” The calendar has improved in recent releases and the hovers offer more flexibility to drag, drop, and stretch a promotion. The calendar is one of the better UX elements. The ability to clone an entire calendar or go event by event is nice. Also, the settlement module has been rearchitected and is relatively strong, as it allows treatment of deductions from a single screen. One UX limitation is that 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, UX has improved, but POI rates CPGToolBox as Average.

Vendor trend: Growth over the last year was only modest but product improvements were noteworthy. Taking some minority investment from PolSource is a good thing for the capital expansion, but also for the expertise to expand scalability and performance by building out the enterprise edition on the Heroku platform and services offerings that include change management.

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. The name recognition of being part of Salesforce cannot be understated.

Challenges: Serving and staying in touch with a global client base while not having offices outside of the U.S. except those offered through partners.

Adjacent offerings: POS and syndicated data storage 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.

Outlook & prognosis: CPGToolBox is well positioned for Tier 2 and 3 companies looking to get off of spreadsheets. The move to offer more ongoing support services through PolSource is a plus for Europe and should be considered globally as many regional companies struggle with resources and partial FTE's. TPO, while topical for the most part, is not as relevant for Asia and LatAm or for smaller companies. We believe that CPGToolBox should focus on more insightful analytics and services as opposed to TPO. Becoming the de facto TPM solution for a major US brokerage organization will provide perspective on market needs and be equivalent to having a user base that is instantly many times larger than before.

Evaluate CPGToolBox when: When you just seek a TPM solution and TCO is very important. You are a Tier 2 or 3 CG company or a Tier 1 with a smaller affiliate abroad. Also, if you want to leverage the Salesforce offerings for omni-channel.

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

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. Data Ventures is a wholly owned subsidiary of a multi-billion-dollar beverage company.

Geographic presence: North America (74%), Europe (17%), and AsiaPac (9%).

Total consumer goods users (seats): Approximately 250 TPM users, of which about 175 also use TPO. Enterprise licensing relationships do not allow for precise user counts.

Tiers represented: Tier 1 and 2.

Solution offerings: TPM and TPO.

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 to understand which promotional approaches generate truly incremental results for both manufacturer and retailer results net of cannibalization and time shifting. In particular we like how it shows volume decomposition graphically, side by side, for both trading partners. It also provides understanding of brand and package switching, and calculation of pricing opportunities. The latter shows graphically which products to promote in a Strategic Pricing Matrix, which is a really cool way of looking at win/lose combinations for both the manufacturer and retailer. Also impressive is DV's ability to index product affinities and display them graphically as a way of looking at co-promotion and product mix opportunities.

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.

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. POI rates 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. Investments in Big Data capabilities have paid dividends compared to competitors. As an example, the iDV Express analytic engine can perform a complex request across 18 million households and 3 billion baskets in under 10 seconds.

Strengths: DV is very hands on with its clients and conducts frequent workshops, even after initial deployment, to help clients grow their proficiency. 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, DV is very strong. Data acquisition, cleansing, harmonizing, and staging is a clear strength.

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 more oriented to power users. Also, getting mindshare is a challenge, 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, demand forecasting, supply chain management, assortment optimization, pricing optimization, demand forecasting, remote shelf monitoring (like to detect out-of-stocks).

Key differentiators: DV's depth of the analytics, combined with the experience of seeing things from the retailer side of loyalty card and shopper analytics. This is a really strong synergy and few competitors can do things like manage 1.7 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 and details on how to execute a better promotion that differentiates DV.

Another differentiator relative to promotion execution is the ability to monitor product at the SKU and store level in near real time, or as often as the data is available. We believe that capability should be part of every TPx deployment, so that adjustments and collaboration can be done in-flight instead of registering that the promotion was not executed per contract or had product availability issues after the event was over.

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 from a partner that wins awards for its insight generation capabilities both at retailers and manufacturers. Also, if you want end-to-end options from data management to ongoing training on the solution. Finally, if you want to bring shopper analytics into the TPx cycle.

Avoid Data Ventures if: If you really just want an inexpensive step-up from spreadsheets solution for TPM requirements for basic needs such as planning and funds management.

Distinction: POI Best-in-Class for HQ Analytics/Insight, Data Management, and Remote Monitoring.

Effectmakers effectmakers.com

Profile: A European headquartered TPM vendor taking an eCommerce approach to selling its solutions, as well as traditional engagement with implementation support.

Geographic presence: Europe (100%).

Total consumer goods users (seats): 1,234.

Tiers represented: All.

Solution offerings: TPM.

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

Analytics: Is based on a built-in report generator with a client-specific Microsoft Analysis Services cube that captures desired KPIs and functionality. The platform is formatted in 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 and there isn't a provision for competitor cannibalization. Also, users input baselines which are calculated through historical averages, not through volume decomposition or lift analysis. We like 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 beyond reporting unless they are configured by the user organization. As a result, POI rates Effectmakers analytics Below Average.

Configuration/Customization: Customization is not an option. Any company-specific adaptations would have to be through configuration, or democratized and addressed through the development process.

Technology architecture/delivery options: On-premises, and both private/public cloud.

Service partners: None.

Technology partners: Microsoft Azure for hosting.

User experience: It has improved since our last writing with more configuration up front to set

the scope of the system and reduce complexity. It has a tile-based landing page from which to navigate to the various functional areas. The UX is still a bit monochrome and grid-like, yet POI likes the stop light functionality and alerts. Some editing to cells can be done through pop-ups, which we like. 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, POI rates the Effectmakers UX Below Average. On the one hand it is simple, but on the other we don't find it particularly attractive or engaging.

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. It has steadily grown its personnel and been nimble about deploying them against current and emerging industry requirements. Predictive simulation capabilities are being rolled out in late 2018 in response to client demand.

Strengths: Simplicity, attractive price point, local expertise in Nordics region, and client retention. It also has a penchant for getting TPM deals with companies that have an SAP footprint for the back office, but choose Effectmakers for the above reasons plus speed of implementation.

Challenges: It remains to be seen whether selling the solution online and through re-sellers will allow them to achieve critical mass, but it is an interesting model. They are the only real entry level TPM solution in Europe, so we continue watch 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. The low price, try-before-you-buy approach, and self-serve deployment model are the key differentiators.

Outlook & prognosis: There is always a market for low cost 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 offering a low cost, self-serve option. The UX upgrade scheduled for February 2019 along with the ability to tell a compelling TPO story will be key to continued growth.

Evaluate Effectmakers when: Your primary TPM requirements are for a complete, 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 baseline/promoted analytics, rich causal analytics, or a superior UX.

Exceedra exceedra.com

Profile: A global TPx vendor that has demonstrated stellar TPM and TPO expertise.

Geographic presence: Europe (43%), North America (46%), Asia/Pacific (9%), LatAm (2%).

Total consumer goods users (seats): TPM: 5,300, of which 2,200 use TPO.

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 like 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. Since the last Vendor Panorama, Exceedra has added functionality to actualize promotions and business plans through integration of shipments and consumption data. This provides an update to the P&L from the bottom up and the ability to monitor in-flight promotions at any level. They have also improved speed of entry of promotions, speed of generation of an annual plan, and in-context analytics. Exceedra provides uplift analysis using statistical models embedded in the promotion module enabling iterative scenarios including cannibalization and halo effects, which have been a big area of investment since the last POI review. For analytics POI rates it as Above Average. It is already a superior analytical product and Exceedra continues to invest and make improvements.

Configuration/Customization: Customization is allowed but not preferred. Exceedra looks to add requested functionality into the standard solution but has done one-off's 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, TPG (Partnering Group), Clarkston Consulting, Eye-on, Genpact, PWC.

Technology partners: Microsoft Azure for hosting and underlying technology. SQL service desk stack, Power BI for visualization (embedded), Office 365. Retail Velocity - Demand Signal Repository (embedded consumption-shipment data mapping services), Preactor (factory planning capability extending S&OP remit), Extended capability to embed 3rd party TPO models into the solution; Mulesoft SAP integration.

User experience: It is one of the few vendors that provide promotion management capabilities to support top down/bottom up promotion management. This includes funds allocation and management, assignment and tracking objectives, supporting HQ guidelines and guardrails.

This holistic approach improves planning and forecast accuracy across the organization and positively impacts integrated business planning (IBP). The Exceedra solution is modular and can be implemented to support the core trade processes, e.g. trade promotion management. It can be deployed as front-end customer business planning to an existing TPM or as the full integrated business planning solution - including demand planning and S&OP support. This allows customers to de-risk projects and also utilize existing IT investments such as SSAP, APO, or BI frameworks. Exceedra's focus is on the principle of "right investment, right result." 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 easily 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.

Exceedra focuses on ease of use and a self-configurable solution to ensure users are using the solution rather than reverting to excel (Exceedra has metrics to measure this KPI). Exceedra continues to advance the ability to manage trade and nontrade deductions with embedded auto-match and AI is their future state. Within the system there is the ability for the account team to capture comments and share with the organization. This is rare with TPM and TPO systems and we wish more vendors would consider this capability. There is great benefit to sharing insights across the organization. Additional areas of improvement: improved implementation times, ease of use, improved multi-channel usage and scalability. POI rates Exceedra UX as Above Average.

Vendor trend: Exceedra has a very strong trend relative to geographic expansion, headcount, and financials. Note this year's growth was outside Europe registering that Exceedra is becoming a true global player. North America grew from 40-46% in one year. Other signs that it continues to mature as a company include: more disciplined capture of feedback from users, usage monitoring, more ongoing training, and partnering for both services and technology. POI has seen Exceedra consistently called for RFP evaluations. 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. Many of Exceedra's 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. Exceedra has a really strong streamlined flow through the optimization and planning process. Note also that their modules are already on modern platforms vs. old legacy technology. A multi-country, large company deployment takes time and clients need to know there is stability in the platform and the underlying technology.

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 must 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 means Exceedra is well placed to support further continued growth.

Adjacent offerings: POS data management/cleansing, demand planning. Retail Monitoring/reporting capabilities of store level data and have integrated to client's handheld devices.

Key differentiators: POI is 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. Ultimately, Exceedra's greatest differentiation is that a company can manage the full planning and forecasting cycle with the Exceedra modules and can achieve the "One Version of the Truth" that all organizations desire.

Outlook & prognosis: POI sees 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. They are continuing to invest heavily in their tool and internal teams.

Evaluate Exceedra when: You seek quality in both TPM and TPO as an integrated and yet modular proposition, may 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, Financial Orientation Simulation, and TPO Ergonomics.

Flintfox flintfox.com

Profile: A revenue management 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.

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: Deep analytics based on getting to dead net pricing with an audit trail of all the waterfall elements. Dashboards are not yet available, but they are working on it for early 2019. The recent addition of Microsoft Power BI is a real plus for the tile-based landing page and steadily providing more 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, particularly where it relates to the ability to handle a dizzying amount of “puts and takes” that go into determining dead net pricing. This is probably overkill for most CG companies, but where such complexity exists, it is good to have an out-of-the-box resource that can handle it. Visualization POI rates as Average, but improving. As the analytics relate to promotions and periodic deals to the trade, Flintfox needs to develop more analytics by deal by customer, through analysis of a visual deal calendar, and for event ROI. However, the lack of these functionalities is primarily a function of the tool being focused on analyzing orders and not events based on the current customers and how they go to market. Nevertheless, POI rates Flintfox analytics as Average.

Configuration/Customization: Any customization would have to be done through source code layering and a pluggable architecture so that the solution stays within the upgrade path. A one-off solution is also possible through source code branching and subsequent merging of custom code with the new product version.

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, PwC, Columbus Global, Edgewater Fullscope, Microsoft Consulting Services, Blue Horseshoe, MCA Connect, Accenture, Avanade, SYD.

Technology partners: Microsoft Azure for cloud hosting, Revionics and Zilliant for price optimization, Vendavo for analytics and CPQ (configure/price/quote) functionality, HP, Hitachi Solutions, SAP.

User experience: The solution is very powerful and the navigation is intuitive, but it isn’t very attractive. It can best be described as “industrial,” because it is relatively monochrome, doesn’t size well on the page, and is less graphically oriented than other solutions POI has reviewed. POI has seen some improvement year over year, but we still rate it as Below Average. It also lacks some basic components that a user needs to manage promotions such as Gantt charts to visualize the promotional calendar. This is not an oversight on the part of Flintfox, but instead reflects the focus on “orders” as opposed to deals. Functionally favors a power user who focuses on the details and not necessarily on how they portray graphically. More information in a grid is better than less information, but POI recommends more graphics interspersed. Hence, the POI rating is Below Average, where our frame of reference is more “consumer” as opposed to “industrial” solutions.

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. Getting certified to integrate with SAP is a real plus in combination with having a field force that is delivering a significantly larger portion of new business as opposed to historically relying on Microsoft to do so. It has offices providing support in all regions except Africa.

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. It would be an understatement to say that the solution has a strong financial orientation; the reality is that it is primarily a financial tool, and hence our characterizing it in the Profile section as a revenue management tool.

Challenges: We continue to believe that the Flintfox UX is largely at the mercy of Microsoft AX, as other TPx vendors have eschewed this option. This brings great advantages from an

integration perspective, but just isn't on par for UX. 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. Otherwise, we don't see significant challenges for Flintfox, as it has a very attractive niche, wherein it is doing quite well with revenues nearly tripling since 2014.

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

Key differentiators: In four respects Flintfox is in a league all its own compared to most TPx offerings:

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 through full audit trail.
2. Penetration into markets such as automotive, building materials, oil and gas, consumer electronics, paints and chemicals, office products, landscaping supplies, 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.
4. More complete business consulting that extends beyond traditional management of promotional orders or deals and into full omni-channel, often for the same manufacturer who goes to market this way.

Outlook & prognosis: Because of the unique functionality for complex promotions and experience with products you would see at a specialty store, home store, mass retailer, or online, we see Flintfox continuing to thrive. And, because we are beginning to see it more at Tier 2 and 3 food/beverage/personal care companies, we believe that it can enter these sectors faster than competitors can enter its stronghold. At some point, Flintfox clients will ask for a dashboard and promotion calendar, but this is relatively easy to provide.

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, both through retailers as well as online.

Avoid Flintfox if: You want a state-of-the-art UX, TPO/baseline capabilities, or if the use of visual dashboards and promotional calendar are central to managing your promotions.

Vistex vistex.com/industries/consumer-products/

Profile: Vistex offers commercial solutions as both an SAP partner utilizing SAP ERP and S/4 HANA technologies as well as its own Go-to-Market Suite (GTMS) for non-SAP companies. This year is the first for Vistex to be featured in our analysis.

Geographic presence: North America (60%), Europe (30%), Asia/Pacific (5%), Latin America (5%).

Total consumer goods users (seats): Enterprise delivery model does not provide for visibility into the number of users.

Tiers represented: All.

Solution offerings: TPM and TPO.

Major product sub-segments not covered: None.

Analytics: Vistex has a complete set of analytical capabilities such as baseline/promoted volume generation, cannibalization and halo effects, nice bubble charts showing ROI and dollar profit for promotions, and a graphical promotion waterfall. It doesn't provide a dashboard to be able to view the business at a glance. We particularly like the "lasso" feature for looking more closely at some elements of a bar chart or scatter plot. Capabilities for understanding promotion as a HQ function are minimal, but instead the software focuses on tools for account managers. It has a nice spend tracker to show how much has been allocated during the planning process. Similarly, a graphic to show target attainment, spending, shipments, and so forth.

Vistex brings a lot to the table from a post event analytics perspective because of the speed and accuracy with which it pulls the trade spend elements from the general ledger to facilitate the analysis. The reports that come with the solution are a good start and can be configured to suit, they just don't have much of a graphical orientation. Overall, Vistex meets the analytical requirements. It hasn't gone to the point of uniquely insightful, so POI rates it as Average for analytics, but Below Average for how analytics renders.

Configuration/Customization: Customization is an option. A rules-based engine architecture enables customizations if necessary while simplifying the effort required to maintain and implement future upgrades.

Technology architecture/delivery options: The SAP-based solution typically resides within a client's existing SAP environment. GTMS deployments are cloud-based and are sold, licensed, and hosted by Vistex.

Service partner: Vistex does the majority of its own deployments, but in the past has also worked with SAP, IBM, and Accenture.

Technology partners: SAP.

User experience: We found it to have good flow and ergonomics, but the lack of a dashboard is an issue. Also, it is quite monochrome and not very graphically oriented. There is an excess of white space and the text/numbers often don't size up well in their allotted space. POI viewed a version with a black background that was much more pleasing from a viewer standpoint. POI rates Vistex UX is Below Average.

Vendor trend: These are relatively early days for Vistex in the TPx space, having entered it from the foodservice and revenue management side of CG companies that subsequently wanted additional functionality. It has a very positive trend for growing staff and revenues and has even taken clients from more established competitors. It also enjoys strong client retention.

Strengths: The primary strengths of Vistex have been its ability to leverage its existing B2B revenue management clients into TPx opportunities and the speed with which it has been able to enter this space because it is able to leverage the resources of its nearly 1,400 employees and revenues in excess of \$200 M.

Challenges: When engaging with prospects that run SAP, Vistex usually has to be invited into the discussion because the prospect is looking for more functionality on complex pricing, a faster implementation, or a better price point. Vistex also has to wait for the latest SAP tools and features to be released to them. Additionally, the SAP Public Cloud does not allow partners to operate therein, so a prospect would have to lease an SAP instance and connect Vistex to it or else utilize the GTMS product offering.

The GTMs product offering presents an opportunity for Vistex to expand outside of the SAP ecosystem, but it can be seen as competitive to SAP. As a result, Vistex will have to become more adept at generating its own leads and managing sales cycles.

Adjacent offerings: POS data management, B2B gross-to-net revenue management tools.

Key differentiators: We see Vistex having two really powerful advantages that competitors are not willing or able to replicate:

1. The ability to handle complex promotions beyond the typical fixed and variable types. This would mean rebates, growth programs, performance incentives, and so forth. This is the Vistex bread and butter.
2. The ability to operate inside of SAP and thus seamlessly leverage the connectivity to pricing, customer master, financials, item master, and to pass accrual data to the ERP.

Outlook & prognosis: Vistex is relatively unique in the TPx space based on what we have outlined above. As it leverages its 350+ existing CG client relationships and executes its GTMS offering, it will be a player in this space. UX improvements are already under way. The next 12 months will be very telling for Vistex, but we believe it has a lot to offer.

Evaluate Vistex when: You run SAP and want an alternative to SAP for TPx, or when you have complicated promotional structures and need a partner who can handle them.

Avoid Vistex if: You want a superior user experience, analytics for driving Headquarter strategy or specifically desire a third-party implementation partner.

Kantar Consulting [consulting.kantar.com/what-we-do/retail-sales-shopper/trade-investment-optimisation/](https://www.kantar.com/what-we-do/retail-sales-shopper/trade-investment-optimisation/)

Customer Profile: A global vendor that is a Kantar company (part of the data investment management division of WPP plc.) 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 (79%), Latin America (6%), Asia/Pacific (5%), North America (8%), and the Middle East (2%).

Total consumer goods users (seats): 7,100.

Tiers represented: All.

Solution offerings: TPM and TPO.

Major product sub-segments not covered: Tobacco.

Analytics: Have expanded to include advanced capabilities such as cross cannibalization, sell-out and shopper data, and total plan optimization. In particular, POI likes how optimization includes expanded factors such as weather, promo duration, competitor promo, mix, and

any special pricing. Also, much deeper volume decomposition to get down to root behaviors in what we would describe as “behavioral TPM,” which brings in several factors of shopper dynamics.

The landing page and 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 and manage the execution. Many other solutions are heavily weighted to either HQ or the individual event. We find that Kantar Consulting has a great blend of both. Some of the macro fund allocation tools are a real boon to revenue growth management (RGM) personnel based on how they can slice by product and by customer.

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. It also has an Excel plug-in that is the best we have seen, for those who favor Excel. Additionally, Kantar data services provides wider benefits: maps sell in/sell out data, harmonization and fixes syndicated data anomalies. As a result, users can trust the data and TPx findings. For insightfulness at the HQ and field levels, as well as how the analytical components render graphically, POI rates 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 both Amazon Cloud (AWS) and Microsoft Azure.

Service partners: Capgemini/iGate, Everis, Business & Decision, HCL, d code, ICB Works, NTT Data.

Technology partners: Microsoft, Qlikview (but will be migrating to Microsoft Power BI).

User experience: Kantar has 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 upgraded 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 also like the heat maps for viewing which products and customers are performing well, a novel way to allocate brand spend across customers, and a very graphical comparison of plan scenarios. Even the detail screens that are nest viewed in a more grid like way are relatively pleasing due to color and shading. POI rates it Above Average.

Vendor trend: Kantar Consulting has acquired new customers as well as expanded with existing ones for nearly 15% growth in user count. We attribute this to more cross selling and ramping up executional capabilities outside of Europe. Kantar is making a huge investment to develop a global, multi-tenant tool, serving one application for all clients, but with individual company “individuality” when required. They are also building the foundation of data that will be good for future AI plan building. It also uses its services organization more consistently as a differentiator.

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 to enable the complete promotion cycle down to getting it all done at the store level.

Challenges: The key challenge lies in continuing to build upon its sales execution investments and build TPx product recognition beyond its other analytical tools for category management and shelf analytics. When Kantar gets on the list of solutions evaluated it does very well. In recent years, it has a strong proclivity for selling TPx to companies that utilize SAP in the back office. We see visibility and getting a chance to show what it can do in TPx as the primary challenges.

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

Key differentiators: Having three solution models is a really insightful way to go to market based on what sort of data is available 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; Virtual Reality to envision it collaboratively with retailers; XTEL assets to execute it; Planorama to capture it; and XTEL assets to track performance/incentives. We also see the usability as a real differentiator, because it has been exceedingly strong for the two decades we have been tracking it. Finally, the increase in best practices consulting resources throughout the entire TPx journey is a real differentiator.

Outlook & prognosis: Kantar Consulting will become a global leader in the next 3 years on the back of its quality and breadth of solutions and influence network. It should get more than its fair share of deals, because it has a superior product, both from a functionality and UX perspective. It will also enjoy high client retention due to the strong analytics in combination with a superior UX, which make it a system that companies can invest and use for the long haul.

Evaluate Kantar Consulting when: You favor a strong user experience, excellent analytics, and industry expertise around the globe. Also, evaluate when you seek TPx as part of a larger, strategy-to-execution solution.

Avoid Kantar Consulting if: You seek something inexpensive to meet basic requirements such as TPM and funds management.

Distinctions: POI Best-in-Class for Desktop UX, Analytics Visualization, and TPO ergonomics.

Nielsen [nielsen.com](https://www.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 (RMO) 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: TPO. The 2 existing TPM customers will continue to receive support, but development has ceased in favor of deeper capabilities in TPO and analytics, as well as supporting partners in the Nielsen Connected System.

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

Analytics: Nielsen offers deep and insightful analytics from the HQ and strategic level for the entire plan based on the ability to gather insights and seek answers to questions. As the TPM solution is no longer being sold, POI will not include the particulars of what Nielsen calls “tactical plan” in this document. What we found compelling in the Nielsen analytics are: the depth of the price simulation to drive pricing decisions and enable the revenue management function, seeing a graphic and chart to convey results, and the automated event detection capability based on consumption data. This is bolstered by the help screens to interpret and advise on an area of insight. POI is also impressed with ways of looking at elasticity and purchasing thresholds with store level data. Nielsen also has profit curve visualization which is exceptional. POI rates Nielsen TPO analytics as Above Average for the depth of the insights.

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: Nielsen utilizes its professional services organization.

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

User experience: The tile-based navigation that links together the capabilities is nice for providing a jumping off point for the analytical elements. Nielsen can optimize promotions on an ongoing basis as well as provide answers on more of a query basis. The information renders very well with a combination of data grids as well as graphics, which allows for rapid understanding of the insights. As a result, POI rates the UX as Above Average.

Vendor trend: The decision to move focus away from TPM was probably justified, given how crowded the space is, but it does provide fewer opportunities for Nielsen to engage across the transactional aspects of trade promotion. At the same time, it has allowed for greater focus and resources to further strengthen the Revenue Management and Optimization/TPO offerings. Nielsen reports that revenues from this product line (RMO) are up, as well as current client log-ons to the system.

Strengths: The depth of analytical resources, name recognition, and industry experience are unrivaled.

Challenges: Manufacturers have historically known Nielsen as a data and consulting company but not necessarily a software vendor. As a result, Nielsen may not be top of mind for RFPs. The challenge lies in gaining more awareness for the robust RMO suite.

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 Nielsen Connected System has been received very positively and was long overdue as a way of allowing CG companies to get more value from the data that they purchase from Nielsen. Thus, Nielsen's Connected System is a real differentiator for improving Nielsen's relevance.

Outlook & prognosis: Nielsen is already a global player. As it refocuses its expertise on the trade promotion problem across the data, consulting, and analytical solutions, dimensions it can deepen its partnership with CG companies. We believe that Nielsen will continue to be a leader in the analytical aspects of optimizing promotions as part of the broader revenue management discipline.

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 CG company, or merely seek a transactional TPM solution.

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): 1000 for TPO.

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

Solution offerings: TPO.

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 adjust 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 or price, this is where Periscope excels. Additionally, for utilizing pattern recognition to established guidelines and guardrails for "never before run" promotions. In particular, we found these analytical aspects to be compelling:

- The depth of analytics to support both the modern as well as traditional trade, where the latter is largely overlooked by many TPO vendors.
- Leveraging Machine Learning for pattern recognition in post event analytics to provide more insight than can be yielded by arithmetic calculations.
- Ability to simulate volume transfer to de-listed SKUs.
- Dynamic price and promotion modeling to empower RGM discipline.
- Advanced capabilities, such as cross elasticities, which many TPO vendors do not have.

- The ability to perform asset ROI calculations for coolers and such and then utilize the workflow to get placing them approved. This includes not only audit trail, but also capture of comments about the asset placement proposition.
- Ability to aggregate optimized scenarios to see total impact at various levels.

POI rates Periscope TPO analytics as Above Average both for insight as well as how the data renders. Even where the data renders in a grid, it is easy to view.

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. For example: a new platform for the Price Advisor product that launched since our last writing allows for more tailoring to meet the needs of a client or subsidiary because they become a single instance in the cloud.

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

Service partners: McKinsey and Company, Eversight for offer innovation, and Dynamic Yield for eCommerce offer personalization. Periscope does its own implementations through the global capabilities in 27 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 tile-based landing page is exceptional because it presents the icon as a mini of the underlying report, which aids in recognizing and navigating to it. Periscope continues to combine power with simplicity in a HTML 5 delivery. 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, create even more scenarios for side-by-side comparison, and then push the desired one into the plan. 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. The dynamic store grouping feature really makes it easy for a user to make comparisons based on attributes and then apply a tactic to them. This includes causal factors such as socio-demographic data that are often overlooked in other TPO approaches. Also, the very robust Learning Management System and eLearning modules wrap themselves around a user as part of the overall experience. POI rates Periscope UX Above Average.

Vendor trend: Growth in CG user count has been low since the prior report. Investment in the product has continued to be strong. Becoming part of the Nielsen Connected Partner program favors existing as well as future Periscope clients through speed and depth of analysis at a lower cost of doing so.

Strengths: The depth of experience working the promotion cycle for both manufacturers and retailers gives them a hands-on understanding of what retailers are thinking about and struggling with. This dovetails nicely with the willingness and ability to manage 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 to leverage existing investments and provide a complete TPx solution.

Challenges: Periscope is reliant on a third party TPM tool for the transactional functions. It 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," and Periscope could lose deals for the lack of flexibility.

Adjacent offerings: Assortment optimization/shelf management/visualization, remote retail monitoring, pricing management. The markdown management tool is being re-platformed, but is still relevant for 2019.

Key differentiators: The level of automation and depth of the end-to-end offering of software and services as previously mentioned. POI also sees Periscope as being a leader in pattern recognition through machine learning to help in answering the questions that people don't think to ask. Also, the willingness to get their hands dirty on the data management and enrichment to ensure a more favorable output. Finally, the Story Boards for presenting the insights to customers or internally are compelling because they are dynamic and make collaboration easier than building PowerPoints from scratch.

Outlook & prognosis: Because of the importance of analytics with a "tools plus services model," Periscope will continue to thrive, but as a specialized offering. However, due to 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 to enable promotion optimization including RGM. Also, if you seek a seek depth of capability for a single/incremental area of expertise like post promotion analytics. In general, if you want expertise and the ability to deploy globally but adapt to the local environment. Lastly, when you want analytical power without overwhelming users with complexity.

Avoid Periscope if: You want a transactional TPM 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/Insight, and External Collaboration.

RI ri-team.com

Customer Profile: A TPM offering from an analytics firm that enables consumer goods manufacturers, retailers, and brokers worldwide. RI focuses on net revenue management through a combination of technology and services.

Geographic presence: EMEA (24%), AsiaPac (75%), LatAm (1%).

Total consumer goods users (seats): 725.

Tiers represented: All.

Solution offerings: TPM. Optimization requires lift or coefficient data from an external source, therefore we consider it to be TPM, but note the distinction.

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

Analytics: Features many pre-configured, dynamic reports. In particular we liked the gross-to-net sales bridge that includes the ability to see it on a roll-up basis. The approach to TPO is to utilize assumptions or external studies about factors such as cannibalization. This is born out of the realization that TPO is very hard to do in key RI markets such as Asia. Also, because they have found that many of these factors don't change much and can be entered on a quarterly basis.

The analytical elements are in unique "decks," which form story boards. It 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. POI rates RI Analytics as Above Average both for insights as well as how they are rendered.

Configuration/Customization: Customization is allowed. A one-off solution would be managed as its own instance.

Technology architecture/delivery options: Hosted/private cloud with Microsoft Azure going forward, but many existing deployments are with Rackspace. This move is more favorable to the Asian client base.

Service partners: RI does its own implementations through its offices in London (HQ), New Jersey (North America Operations Main Office), Bentonville, Sydney, and Singapore.

Technology partners: Tableau and Highcharts for data reporting and visualization. Microsoft PowerBI is also becoming a default option over the next few months. Current API/data extract functionality allows organizations to bring data into their BI tool of choice if they desire another option.

User experience: The current UX is strong but will also benefit from a refresh in Q4, 2018. Elements that enhance the UX that we like include:

- Tile-based navigation as a jumping off point for all business process areas related to promotions.
- A knowledge repository for past plans and events that is stored in a uniform format. It includes a high degree of text-based knowledge management of what happened in previous periods and why.
- The use of sliders in the arithmetic “what if” process; just move the slider and either watch the graphic or look at the numbers.
- Click through from the calendar to the P&L or have it as a pop-up. Also, the ability to modify a promotion right in a hover over the calendar.
- Ability to plan at many customer levels and see the investment, expected ROI, and actual results at those levels.
- The story boards are like dashboards on steroids because they provide a total understanding of the business and are the output of the process that can be shared. These are really cool and provide multiple views of the situation. In a word, they are where the UX gets really excellent.

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 also note the expanded ability for users to upload their own data, which improves the experience of both support as well as field personnel in how they interact with the system. POI rates RI UX as 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 and organic growth among these clients alone accounted for 16% growth in seats in the last year.

Strengths: The 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 plus a robust change management approach that includes collateral materials and communication strategies ensures user adoption.

Challenges: They need to translate their expertise in creating baselines into a TPO solution that is predictive, rather than arithmetic and based on averages. This will make them more relevant for both Europe and North America. 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. Finally, RI needs to focus on visibility. It was great to see a recent case study of one of its largest clients, but RI needs to do more to get the word out such as having user events, more case studies, and publicizing its successes.

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 and managing execution 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 Asia Pacific.

Avoid RI if: You need a global deployment through a 3rd party, TPO that generates elements such as baseline and cannibalization, or settlement capabilities through an integrated solution.

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

SAP SAP.com

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

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

Total consumer goods users: 18,000 combined across TPM/TPO. Enterprise license agreements do not provide a distinction between the two.

Tiers represented: All.

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

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

Analytics: Continue to benefit from SAP's significant focus in this critical area. The landing page contains KPIs that account managers care about and each have drill down capabilities for root cause analysis. The landing page layout provides both insights as well as details in just one click. The ability to see each of these elements on a line chart is very informative. When viewing a promotion, POI likes the ability to see it as a graphic as well as all of the details on a grid. The ability to segment a plan by categorization and buyer with KPI's set up for each specific buyer help to enable JCBP. Emerging capabilities in guided discovery are exceptional, if not visionary. The analysis capabilities can enable a high-level executive discussion or an interactive meeting with a buyer- the graphics are really that good! POI also likes 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. A user can layer in KPI's easily and can zoom in on a quarter or other timeframe of the plan. Seeing multiple scenarios side by side is not only powerful but the graphical renderings are very good. SAP has taken scenarios to a new level. They have taken their combined analytics platforms to Best in Class levels in 2 years. Because SAP has greatly enhanced how the data renders as well its insightfulness, POI rates Analytics as Above Average across the board.

Configuration/Customization: SAP provides customer exits for enhancing the solution without precluding upgrades. SAP provides a platform which the customer and partners can leverage for adding their own enhancements.

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, and Capgemini.

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 relevance. Users can enter data directly into the hover.
- Chevrons give a clear sense for the process flow and where a user is in it.
- An optimizer that shows side-by-side scenarios as well as a graphic to show profit on the side.
- A user can visualize product hierarchies and drill into them as well as create custom roll-ups.
- Exceptional graphical orientation.

SAP has created the Trade Management Golden Process methodology based on 17+ years of working with some of the largest CP companies around the globe. The process dissects the trade management business process down through four levels of detail across key stakeholders to define cross-functional impact, roles and responsibilities, and data requirements. The process steers development, implementations, and change management at the customers across the key roles impacted by trade management. This lends to a user experience that works well, as it is built for the specific organization.

The much-needed flexibility to plan on a separate planning hierarchy (vs. ERP) is now possible with the HANA foundation. Users can also do a split calendar when planning and drag a successful promotion from one year to the next. This has proven to be an 80% time savings for planners. When clients also have the TPO platform, the dropped promotion content will be updated with new uplift values. The Trade Management calendar uses the CRM Marketing Calendar for a view of the marketing events. So, for customers using CRM Marketing those events will be visible. If not, the feature to enable the capture of consumer campaigns can be enabled to reflect them in the calendar. POI especially likes that when a user drills down multiple times through reporting the visualization continues to be strong. Google like search capabilities enhance the user experience. POI rates the SAP UX as Above Average.

Vendor trend: The past 2 years have been key for SAP. With investment commitment, SAP has addressed most major shortcomings in its previous versions, landed numerous 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 platform pricing to 4 major trade management line items [CBP/TPO/ROI --SAP's ATMA; PwC/Strategy&'s Performance Analyzer]. The new Customer Business Planning platform is truly an out of the box solution, as opposed to a framework for co-development. The UX is now among the best, as is SAP's 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. SAP has machine learning available and fully integrated with Trade Management, including wrap-around optimization for customer planning which is a prime example of SAP quickly bringing new capabilities into their trade management process.

Four years ago, we were urging (if not criticizing) SAP to close the functionality and usability gaps. The last of the foundational gaps, Indirect Planning, is on target to close in November 2018. Now we find ourselves urging them to stay out in front and looking forward to discussions about the visionary elements of the roadmap. The most recent advancement is seen with SAP's Golden Process which enables SAP Model Company for Trade Management (MC4TM) which was released in 2018. MC4TM is an implementation accelerator that can enable a customer to stand up SAP Trade Management in 4 weeks for a reference system or to fast track the blueprint phase for an overall faster time to realize value.

Strengths: Product development is now a strength for SAP. It has shown that it can buckle down and deliver needed and innovative capabilities, and quickly. SAP is now a leader on the development side. It also has a vast service provider network, name recognition, and relationships with IT organizations. In memory computing powered by SAP HANA. Tight integration with Demand Planning, S&OP/IBP, Retail Execution which drives one set of financial "books." SAP's client Trade Council is a differentiator. While many vendors solicit input on new enhancements, SAP treats the process formally and seriously through more personal interactions with both SAP and peers. Clients find huge value in the process (sharing between the teams on system set-up, process etc.).

Challenges: It will take some time for SAP to break the stereotype that SAP had for years, which was somewhere between stark and basic for TPx. Many companies are on older SAP TPM versions, and it will take time for SAP to upgrade some of its historical client base to the latest and greatest capabilities. These companies will need to decide if the change is worth the time/effort/cost. There are Tier 2 opportunities where SAP can scale down and meet their needs with a modular product, but pricing commensurate with size will be key. However, SAP 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 continuing to gain investment money for enhancements and innovation, as SAP 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, Hybris Marketing, SAP CRM, and SAP ECC.

Key differentiators: The embedding of AI in analytics, optimization, and overall business process are unquestionably hallmarks of leadership. In fact, the way Google delivers these unrequested insights through Smart Discovery is exceptional. 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. This will lead to a much smoother and more as "advertised" integration. Finally, if you are looking for 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, and Calendar.

Sequoia sequoia.com

Customer Profile: A trade optimization (TPO) and customer analytics firm combining technology, services, and expertise.

Geographic presence: North America (85%, of which 70% is in the U.S and 15% in Canada) and Latin America (15%).

Total consumer goods users (seats): Approximately 650, but current licensing arrangements do not allow for a precise number as they are enterprise level.

Tiers represented: All.

Solution offerings: TPO. Optimized promotion planning developed through the TPO offering that can be exported through API connections to a company's existing TPM system. Utilization of web services to access and pass back TPM centric data can be established and is in place with numerous Sequoia customers.

Major product sub-segments not covered: None.

Analytics: Previously we considered Sequoia as more a customer analytics firm, but their launch of their new 20/20 platform leverages state of the art technology and improves functionality. This advancement in capabilities makes it a complete TPO and revenue growth and pricing management offering with single sign-on and role-based log-in. Sequoia's Analytics and Visualization (A&V) area of 20/20 provides a continuously expanding chart and reporting library as well as the ability to build and visualize any chart or report a client may require. This advancement with 20/20 transforms the previously static Excel reporting into an automated report/chart with full functionality integrated into the A&V library. Any Excel or Power Point chart a client currently uses can be re-created in A&V.

With the new A&V reporting capabilities comes a waterfall, drill-down report. This report helps the client determine what is driving the business. The advanced reporting capabilities enable the client to drill down on a product or other factor (i.e. price, promotion) to extract all factors that are affecting the promotion. Within analytics clients can perform post event analytics (PPA). Historically this was a separate Sequoia offering, but with 20/20 it is now fully incorporated into one seamless platform. Whether utilized by sales or HQ, the ROI capabilities drive better strategy, growth, and promotion effectiveness. They allow the client to find the merchandising sweet spot. This aspect can also be utilized to perform customer segmentation models. These capabilities are based on Sequoia's data and modeling.

Note: Models are not yet constraint based in 20/20 like they were in the prior platform. Adding back constraint-based functionality is on the near term 20/20 migration roadmap.

Any report can also be shared with a non-system user through Outlook integration. We like the ability to use arrows to indicate how a data point has moved over time. We also like 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 a planner is subsidizing base price through EDLP.
- Show cross-elasticity graphically side-by-side to show product interaction (own brands and competition).
- Model the effect of a price increase across the entire category.
- Easy to visualize promotion win/win chart (events that are win/win for the manufacturer and retailer).
- Model a category 12 times per year to ensure the tactics stay nimble.

As it is both insightful/powerful and renders very well, POI rates it as 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.

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

Service partners: Sequoia does the majority of its own implementation work from its offices throughout the Americas. A new strategic alliance with Genpact (announced 11/1/17) will deploy Sequoia capabilities within the Genpact client base. Sequoia handles all statistical modeling, tuning, testing, and other data management activities.

Technology partners: Liquid Web for hosting.

User experience: Has improved dramatically with the 20/20 release. A user can quickly review historical promotions and pricing for effectiveness and what-if the best promotions to build their plan. There is a seamless workflow for the users. Quality data is handled behind the scenes and is agnostic to the user. Yet, during Sequoia led hands on training the user gains knowledge on what an elasticity is, what does it impact, and how the models are built and refined (at a high level). This helps bridge the change management and adoption with the total company user base. Clients benefit from dedicated strategic consulting support from Sequoia analytical teams. The consulting model allows Sequoia to fully understand all aspects of the client's challenges and business goals. The systems ease of use and hands on support drive user adoption. Sequoia has taken usability to nearly sublime levels with the new 20/20 platform and user experience. POI rates it as Above Average.

Vendor trend: In addition to new licensing arrangements, with the advanced 20/20 platform capabilities Sequoia has grown through organic expansion of its current customer base. Sequoia is also beginning to work with retailers who want to manage pricing and promotion effectiveness more closely.

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. The new alliance with Genpact is a strategic investment.

Strengths: Strong client retention; users come to depend on the insights and deepen their use of the solutions over time. Much of Sequoia's efforts have been dedicated to organic expansion of current customer capabilities. While data management is not a criterion this year in the Vendor Panorama, it is important to call out that Sequoia manages the data for the client and reports a consumption forecast accuracy prediction within 10% of actuals and within 5% for faster moving items. The Sequoia team builds the co-efficients for pricing and

TPO models vs. relying on the customer to do so. By breaking down the elasticities at the UPC, customer, banner level clients are able to establish product interactions (internal and competition), drivers, execute pricing scenarios, and develop better forecasts. All of which improves quality of assumptions, decision making, and plan effectiveness.

Challenges: A challenge POI sees is that companies like Sequoya with solutions plus services and expertise are often brought in to clean up after “software only” solutions fail to deliver on their promises. This results in only a few power users on the solution who stay under the radar screen and do not shine a light on the fact that too 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 in the organization. As with other vendors who have robust capabilities, it is hard to relay the benefits of all offerings in a simple “day in the life story.” Often times, a vendor is approached for a TPO RFP and the manufacturer lens is strictly on optimization vs. the holistic value a vendor can offer. Having the right leadership audience as part of the manufacture decision making process is key to enabling “more.”

Adjacent offerings: Category management and elements of demand planning.

Key differentiators: Holistic analytics system, depth of the insights gained, high touch client engagement model, and flexibility of the tool and vendor. These manifest themselves in four ways:

1. The new 20/20 platform encompasses price simulation, promo simulation, strategy simulation, histogram, post event analytics (PPA), and Analytics and Visualization (A&V). Historically some of these modules were separate platforms, but with the 20/20 release, they are a seamless holistic analytics system.
2. Intuitive user interface where a user can quickly review historical promotions and pricing for effectiveness and what-if the best promotions to build their plan. There is a seamless workflow for the users. Waterfall reporting enables users to drill down to causal factors.
3. Sequoya prioritizes client engagement throughout the life stages of the client deployment and long- term relationship: From early engagement sessions with users to determine fit gaps to ongoing dedicated consulting support. 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. User conferences are also held twice each year for sharing best practices, developing new enhancement ideas, and as a forum for staying in touch with clients and their needs.
4. Willingness and ability to change the platform. Sequoya drives continuous improvement and the migration to their new 20/20 platform is a grand example of platform improvement. Sequoya prides itself on constant product improvements as opposed to quarterly or bi-annually.

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 will be delivered with the high touch service model and entail winning one or two countries at a time as opposed to a mass global approach. Nevertheless, the approach is consistent with our POI research, which shows that a high touch deployment with the right vendor support and skillsets is critical.

Evaluate Sequoia when: You have a transactional TPM tool and wish to add significant pricing and promotional insights into the planning process by leveraging 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 support the execution, if not fully facilitate, your doing so. Finally, if you want to bring experts into your process to assist or outsource portions of it (i.e. co-efficients, pricing segmentation models, ROI).

Avoid Sequoia if: Your company seeks basic trade promotion management capabilities (TPM) to execute or settle promotions, or if your company wants an on-premises solution that you can highly customize.

Distinction: POI Best-in-Class for Desktop UX, HQ Analytics/Insight, External Collaboration, Analytics Visualization, and Data Management.

TABS Analytics tabsanalytics.com

Customer Profile: An analytics and data management company.

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

Total consumer goods users (seats): 200+. Enterprise contracting does not allow for a precise user count.

Tiers represented: All.

Solution offerings: TPO.

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

Analytics: The acquisition of Pivotstream is a real plus for CG companies who want more configurability in dashboards or require power to do more heavy lifting with their data. This becomes a second option to how TABS delivers analytics. We still find that the TABS Total Insights dashboard is top notch, because it is visually compelling, and 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.” We applaud the recent move to become more data agnostic instead of relying on traditional syndicated data sources as well. There are many other analytical insight capabilities such as:

- Understanding the impact of existing, discontinued, and new products on growth.
- Visually showing 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.
- A “ship to consumption” that helps to equilibrate the two metrics and provide insight about behaviors such as diverting and forward buying.

Additionally, the All Outlet Visibility offering now leverages a recent acquisition of a cloud-based big data management firm to increase speed and data rendering through Microsoft Power BI. All Outlet combines eChannel with brick and mortar to better understand product performance dynamics in the marketplace with the inclusion of Nielsen, Info Scout, 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 POI 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 POI rates Tabs Analytics as 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. Some deployments are not exactly on-premises, but are behind the client's firewall. Public cloud is moving to Azure over the next few months.

Service partners: Hybrid Intelligence, Cognizant.

Technology partners: Tableau, Microsoft, Alteryx.

User experience: Very strong UX and ergonomics, which continues to improve each year. The landing pages are exceptional. It is graphically engaging, and additionally offers grids beside the graphics for those who prefer to view it more like raw data. The software look and feel is 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 also like:

- Embedding images such as ads as part of the baseline rendering and calculation so that the user can see what it is that drove the results.
- The ability to do a promotion simulation off of a single screen that is graphical and provides a holistic view of the business.

POI rates Tabs UX 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 the 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 Tabs 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 demonstrate 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 within the COE or analytics organization. This reduces the number of potential product ambassadors that can migrate to outside companies.

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. Finally, 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 Dashboard and Data Management.

T-Pro Solutions t-prosolutions.com

Customer Profile: A data harmonization, analytics, and TPO 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. Based on client requests for TPM capabilities, T-Pro was pro-active in building an agnostic interface that works with any TPM, including developing a partnership with AFS enabling TPO/TPM planning when both capabilities are desired. POI ratings will be based on TPO only product offerings, but we will call out where there are TPM related benefits.

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

Total consumer goods users (seats): 450.

Tiers represented: All.

Solution offerings: TPO.

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

Analytics: T-Pro has just soft released their new Analytics package, T-Pro insights. This technology is based on a proprietary data cube. On the landing page and dashboard clients can now see how the business is doing at a glance. T-Pro is in the process of building a library of dashboards for client use. A gatekeeper for each client will manage the dashboard and how the organization will look at the business. Data visualization is excellent and the user can drill down to gain insights. Users can quickly toggle between graphics and tables depending on preference. When any report shows red, a user can pull up T-Pro's accelerated intelligence to guide the user to action. The solution is oriented around post-promotion analysis and optimizing annual customer plans to company or brand objectives. Baseline/

promotion analysis is the heart of the approach. It is the accuracy of T-Pro baselines and data (management/cleansing- including anomalies in syndicated data) that is attracting clients who have found less accuracy elsewhere. As we know, predictions are only as good as the data utilized. This is true for T-Pro ROI capabilities and analytics. The system does the heavy lifting and cleansing of the data, aligning promotion shifts and outliers. This keeps it simple for the user while enhancing accuracy. The promo detail event report represents key metrics with ROI which is fully exportable to excel. Over 100 measures are currently available for utilization. T-Pro handles promotional overlap and EDLP and users can see specific impacts of each. 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. POI rates it as Above Average.

Configuration/Customization: While the T-Pro application can't be customized to meet a client's specific needs, any such functionality is managed through configuration. As a true SaaS solution, all clients are on the same version of the application. T-Pro has the capability to develop a one-off custom database instance at an incremental cost.

Technology architecture/delivery options: Public cloud on Amazon Web Services is standard and the Azure Cloud environment is available on request. 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: TPM through AFS partnership.

User experience: T-Pro has undergone substantial enhancements this year. Perhaps the most evident is having a landing page for understanding the business at a glance. However, 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 is simple and yet powerful, with emphasis on simple. A library of scenarios helps with plan creation. POI found it to be exceptionally "flow" oriented, meaning very stepwise with the ability to drag a scenario from the library into the plan. Historical ROI is easily reviewed and users can drill into historical data to validate predicted lift. This is especially important when companies begin the journey into TPO capabilities and need to manage change with users. 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. As companies focus on RGM, note that T-Pro can do complete customer P&L's for both the manufacturer and retailer. POI rates it as Above Average for UX because they really have made a complex process quite simple.

Vendor trend: Despite being relatively young in the marketplace, the growth has been substantial with companies of all tiers. Product investment continues to be considerable and the investment is reflected in the robust tools and new client base. Plans to do more in category analytics will strengthen the value proposition.

Strengths: The simple and intuitive planning process and high degree of usability cannot be understated. T-Pro is a highly entrepreneurial company and features a core management team with deep industry experience. This is reflected in a highly ergonomic process flow, usability, and successful deployments. The T-Pro/AFS partnership is stellar and the two companies are utilizing their individual strengths successfully to grow the mutual business. The seamless experience for the user is quite amazing.

As T-Pro branches into tier 1 clients and gains business based on the partnership with AFS (TPM), it will need to ensure the hands-on approach provided by T-Pro associates can be sustained. Additional support partnership may be necessary to execute successful deployments.

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. T-Pro can be layered to offer optimization and drive efficiency in promotion effectiveness, while still using the existing transactional TPM system. Ultimately reducing TCO and time to value. Simplicity is a big differentiator. Utilizing unique metrics such as “Consumption-to-Purchase Index” (CPI), adjusted forward buy and diverting, and “percentage base participation,” which is a better indicator than ACV when promoting a single SKU, also set T-Pro apart.

Outlook & prognosis: Being able to leverage existing TPM investment is a nice option. We actually see T-Pro winning against TPO vendors that also have a TPM solution. 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 company’s primary need is a TPM solution. T-Pro has some TPM functionality, but presently lacks key components like settlement. Best to let it do what it does well. At the same time, the AFS/T-Pro partnership is powerful. So, if your primary need is TPM the partnership is always an option. Also, if your company is looking for a global deployment with local support.

Distinctions: POI Best-in-Class for TPO Ergonomics, Post Event Analytics, and Data Management

UpClear upclear.com

Customer Profile: TPM & Analytics (Including ROI) vendor with a global footprint.

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

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

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

Solution offerings: TPM.

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

Analytics: UpClear has a robust user landing page/dashboard that provides contextual messages to the users for action items. It allows the user to configure views based on individual user preference. Tableau is utilized for the dashboard and analytics and is embedded in the user experience. The graphics are excellent and some of the best POI has seen. We like the tile-based orientation with a miniature version of the underlying report to aid in navigation. Functionality for top-down planning and budgeting are a real plus for visibility

and accountability. The TPO Toolkit also provides for the reception of key lift data and furthers 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 downs into nearly any graphical element. Significant changes in analytics include: Visualization and charting have been added to the pricing module to show pricing changes over time, discounts, list, and invoice pricing. The analytics promotion dataset has been enhanced to include overlapping doc types within the promo impact calcs, cannibalized SKUs, and post promo dip. These will provide full visibility of promotion performance. It will also help RGM to identify Top 10/Flop10 promotions. UpClear has top notch Revenue Planning reports and capabilities, as it enables revenue planning screen visualization and analysis of key metrics at a glance. 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. POI rates UpClear Analytics Above Average.

Configuration/Customization: Most user needs can be accommodated through configuration. As a result, customization is not an option at present, unless it is a change that aligns to the global roadmap.

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 (USA); Infor for general partnering from ERP to joint product marketing, sales, deployment, and integration; Edenhouse and Pivot for SAP integration; Rackspace for hosting; Microsoft for technology and hosting, and Digital Security for Security, GDPR, etc.

Technology partners: Rackspace and Microsoft for technology and architecture. Infor as ERP partner/integrator. Tableau for data visualization. Dell Boomi for data integration. TPO offered is through an embedded solution from Management Science Associates (MSA).

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 been dramatically improved to include more segmentation, visualization, competitor activity, and perform drag-and-drop activities. The enhanced calendar also includes promotional indicators, the ability to show/hide promotional details (easy slider button), swap between ship and store dates, and reflects marketing activity and competitor details. While the calendar represents a lot of data and insights, and it renders well. Ease of deduction clearing is facilitated by automation of invoice matching in BluePlanner. 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. The Mobile BluePlanner for viewing and approving on mobile devices is also a real plus. The Intelligence product could be enhanced with additional graphical aspects. Some dashboards and reporting are highly graphical, while others continue to remain in Excel-like grids. POI rates UpClear UX as Above Average.

Vendor trend: The company is high-growth and is heavily investing in senior client team members. They are recruiting globally only those people who have the appropriate CPG and TPx technology experience. They have created a new Client Lead role where individuals have direct and on-going responsibility for the global and enterprise client success. UpClear is also making inroads into Tier 1, which positions it very well to enable a multinational company in all markets, not just smaller ones. UpClear is continually evolving their solution with added

functionality, capabilities, and enhanced performance to further meet the needs of clients, who are operating within a market that is being revolutionized by disruptive forces such as Amazon and Google.

Strengths: The Global Enterprise Template, specifically for multi-market and/or Enterprise sized clients, incorporates all the best practices for TPM revenue management for emerging markets. The process ensures clients with complex requirements are able to develop a Core BluePlanner model that meets the needs of the central team yet is also able to allow individual markets a degree of flexibility based on local requirements, legislation, and business unit needs (80/20 Core/local split). UpClear utilizes a phased deployment strategy, which ensures that the most critical business needs are addressed with the relevant functionality first, followed progressively by further modules. This approach is followed even for global deployments, where the first module deployed can vary between markets, again depending on the pressing business need or market capabilities. This “Pilot” methodology and stepped approach, combined with the intuitive nature of the system, ensure that adoption is rapid and change management issues are minimized. Everybody claims to be able to do rapid implementations, but UpClear does 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 in partnership with their current clients. The work done on the calendar and the creation of a Top Down Budget in BluePlanner are good examples.

Challenges: POI doesn’t see UpClear having significant challenges. However, managing 20% plus growth for nearly half a decade, finding the resources and focus to build out a data integration offering, and being a global player with a relatively small revenue base, may tax focus and resources.

Adjacent offerings: Data management and integration; RGM consulting services.

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. UpClear has 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. Driving insights across the organization is critical and POI wishes more vendors had these capabilities.

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

Evaluate UpClear when: You want a really good, well-rounded, TPM system and 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.

visualfabriq visualfabriq.com

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

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

Total consumer goods users (seats): visualfabriq has transitioned to a enterprise subscription model (unlimited user) vs. per user/seat model.

Tiers represented: All.

Solution offerings: TPM and TPO.

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

Analytics: visualfabriq is working with web based HTML5 with OS machine learning included in the platform out of the box. visualfabriq is one of a very few offerings that is already utilizing AI. While visualfabriq has enhanced visualization on its roadmap, the dashboard looks good and is easily configurable with drag and drop capabilities. It provides standardized template reports, which can be enhanced or adapted by the user. The ROI 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. The fully automated 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. In particular, we like how the ROI is graphically represented while also providing the standard revenue/ROI data field in chart/grids. visualfabriq also has some unique KPIs, like “bang for the buck” ratio, to provide deeper 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 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&, EOH South Africa, EyeOn, RGP (US Consultancy – project mgmt.), Deloitte consulting; ATKearney for boardroom support.

Technology partners: Amazon Web Services for cloud services and 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 on the calendar. It allows a user to see the prior year or a competitor’s promotions as a shaded box as a reference point when evaluating or planning a promotion. This can also be used with HQ teams for Go to Market strategy development. Another favorite calendar aspect is the ability to visually see which promotions drive more profit/incremental volume, incremental sales/less incremental profit, and simply more net sales. This visual helps the planner quickly evaluate promotion options that can be repeated based on the promotion objectives. The planning process is very stepwise and a greyed-out circle on the navigation panel always tells you where you are in the process. Best practice sharing across client base is facilitated by the integrated Zendesk tool and hosting two user groups a year. Joint Customer Business Planning is facilitated by enabling the sales person to present “in-mode” hiding manufacturer cost etc. and also through exportable PDF proposals. POI rates visualfabriq UX as Above Average on the strength of the ergonomics and numerous profitability management and innovative AI trade capabilities.

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 across the 3-tier structure. In the last year, tier 1 clients have partnered in the development of new solutions: Demand Sensing and demand forecast master solutions. New Trade spend master solution is on track to deploy this September. visualfabriq is also moving forward with REACT front end technology (Facebook developed) which will completely upgrade the front end and can scale quickly (September 2018 release). POI believes the work it is doing on machine learning and the REACT front end capabilities will pay dividends as an early mover advantage. The change to an unlimited user enterprise subscription model vs. per user/seat model is good and has been appreciated by their customers. In 2017 visualfabriq had 15 contracted clients and in 2018 the company has 30 established clients. Roadmap of new offices demonstrate growth: North America August 2018 (NY office established), AsiaPac (Australia office, 2019), LatAm (New Mexico office, 2019).

Strengths: A very robust trade management tool that enables price management, promo what-if optimization, promotion planning, internal/external sell out predictions, improved baseline creation, and volume forecasting. visualfabriq is a forerunner in AI usage for trade management. 80% of a tier one client's planning is accomplished through new AI capabilities and models. There is flexibility to utilize the AI models or have users input baselines, lifts, etc. The value is in the flexibility as an organization learns to trust the system. This is especially true with clients that don't have robust historical data. There is a high level of change management that accompanies system implementations and visualfabriq works with clients to move an organization through the change. visualfabriq utilizes a standard deployment process that drives successful system implementation in approximately 4 mo. It has the 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 offers 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. Global expansion is always harder than expected, and visualfabriq will need to evaluate best practices, processes, system instances etc. as they enter new markets.

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

Key differentiators: visualfabriq was created to fill a need in the European market which was lacking in suitable, reliable systems. The expertise and passion for TPM/TPO and machine learning will aid in visualfabriq's growth and client retention. Also, the willingness to offer data management services is quite unique for a vendor of their size, if not for the market as a whole. Baseline creation and forecasting. visualfabriq is one of the few organizations that allows access to the predictive models and enables a client to get under the hood and understand, align, and facilitate the modeling in a repeatable way. (Note: Model review is by key client members and not all users).

Outlook & prognosis: Given solid growth, excellent vision, clients of all sizes, and a strong/insightful user experience, we expect visualfabriq to continue to be a very strong option for European companies or affiliates doing business there. Global expansion is on the horizon, and while visualfabriq will experience growing pains, we feel confident their passion and drive will overcome any obstacles. The key will be to hire and partner with the right people when entering new markets to help speed to market success.

Evaluate visualfabriq when: When your organization is looking for a total trade and revenue management package (TPM/TPO/ROI) from a company that has deep expertise in Europe. Also, consider visualfabriq 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 want a basic/transactional TPM.

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

Wipro Promax Analytics Solutions (WPAS), a wholly owned subsidiary of Wipro Limited.
promax.wipro.com/

Profile: A TPM /TPO vendor that is part of a global services and technology company. The Promax solution suite provides complete promotion planning, execution, management, tracking, and optimization capabilities that are highly automated.

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

Total consumer goods users (seats): Approximately 5,500 (TPM and TPO combined). 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: WPAS includes the full analytical stack such as multi-causal uplift models, cannibalization/halo effects, pre- and post-promotion evaluations (very nice side by side ROI evaluation), price/profit optimization, and predictive planning. The system decomposes the data and manages in-store and period matching, removing syndicated data anomalies, with no user intervention. Coupled with this are modelling and sales analytics capabilities that enable clients to optimize a promotional program with real-time predictive analysis to guide optimal execution. POI likes how it visually shows the gap between what a user predicts vs. what the system predicts. Cannibalization shows all brands impacted by the promotion as well as those benefitted, not just my own brands. Users can 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. It has some unique and insightful views and renders well visually. Note that promotions optimized with the TPO offering can be pushed into Promax Advanced (TPM) or another TPM system (see CRM technology partners below) HQ capabilities to analyze and allocate spending budgets by account optimizing the use of trade funds and ROI. Real-time monitoring and analysis of promotions and the ability to manage execution and course correct. Promax Sales Analytics and reporting capabilities provide in memory reporting that is fast and has both high level visual dashboards and powerful pivot table capabilities. Wipro works with client teams to build confidence and accuracy and helps an organization move through advanced analytics change management. POI rates Wipro analytics as Above Average.

Configuration/Customization: Promax is a highly configurable solution. Customized product extensions are accommodated with some clients. Pure customization is happening less and less as the standard product continues to evolve and the out of the box version contains all necessary best of breed planning components.

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, Mobility, ReX and FMS.
- Terra Technologies for Demand Sensing.
- Retail Solutions Inc. for decision support.
- Microsoft Business Intelligence for reporting and visualization.
- Sales Force.com for SFA and CRM.
- Spring Wireless for Retail Execution, Mobility, DSD.
- TeraData.
- ThinkVine for Marketing Optimization Mix.
- Opera Solution for advanced analytics and insights including signal hub (400+ data scientists).

User experience: The TPM solution has a nice UX across the platform. It has a visual calendar with the ability to drag and drop promotions with Excel style mass data entry. The new calendar has the ability to overlay last year's calendar to see what happened vs. plan and also enables a retailer view. The visual representation with color coded status and traffic light indicators highlighting financial viability of the promotions is exceptional. The UX has been improved with reduced time to plan promotions, 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 a right click to "publish" and push it to the TPM solution for execution. It is ergonomic and favors both field and HQ users. POI rates Wipro Promax UX as Above Average.

Vendor trend: Wipro 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. They have been experiencing modest growth, which is less than their fair share based on the resources and market presence of the parent company.

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 third-party TPM, which is a major element of the current WPAS strategy for TPO.

Challenges: WPAS is part of a very large company. It is doing the right things, and it needs to continue to maintain focus and remember that consumer goods companies respond slowly to even the most innovative new developments. Therefore, it can't expect it to behave

like financial services, healthcare, or some other sector. WPAS will need to have continued enhancements of the UX and take optimization deeper to show consistent investment and focus on the right things.

Adjacent offerings: Wipro Holmes is a cognitive AI platform that can be used in the TPM process to improve auto invoicing and settlement process. Wipro sight shelf Analytics helps track shopper behavior and purchase intent within a store optically and ensures optimal product availability on shelves and promotion placements in the store are best maximized. Wipro insights driven shopper marketing to provide a personalized shopping experience with (offers, pricing etc.). Data Services are separate modules that work together and can be procured and layered as business dictates.

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 160,000 employees. Wipro has a wide array of individual services within its management, implementation, and consulting practices. The facets of Wipro offerings have been designed to develop and evolve a strategy for a client's long-term improvement, execute the strategy, then maintain the benefits of the strategy through continuous improvement. This is demonstrated by the long-term clients that stay and expand capabilities over time. Not solely unique to Wipro, but one of a few vendors that enable top down and bottom up planning. Using the budgeting functionality, business targets are distributed to planning accounts and then validated against optimized plans created with the predictive strategic planning capability.

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

Evaluate WPAS when: You want a combination of global support, potential for deep services (data management, data science, analytics or consulting), 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 layer on TPO.

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

Other Enablers

Once again, we highlight a capability that we see as adjunct to the TPx solutions featured above and having potential to dramatically improve promotional outcomes. In this case, we focus on two capabilities: one for making deductions faster and more accurate for better post event analysis; and, the other for improving the quality of the external data that is so critical to performing predictive modeling of promotions as well as doing post event analytics. These enablers are as follows:

Genpact's Contract Assistant genpact.com/what-we-do/industries/consumer-goods/trade-promotions

What it is: An AI-driven tool for creating promotional contracts where they may not exist, compiling them into a single location repository for future reference, and automatically clearing deductions as they are received.

How it works: Using an AI capability called natural language understanding (NLU) in concert with pattern recognition and machine learning, it mines the elements of promotional offers from sources such as email, TPM systems or wherever they may exist as text or a file. It then interprets the meaning of the words and populates the elements of a contract so that they can be referenced later.

As an automated, stepwise process, Contract Assistant processes like this:

- **Contract creation:** The system ingests and interprets promotional event information and creates a contract/deal sheet on a retailer's portal in the retailer-defined template format.
- **Validation:** The system receives each customer invoice, extracts data from it and its associated contract, and interprets this information to identify validation criteria.
- **Proof of performance:** The system retrieves third-party market research data (from a separate application), performs price and quantity validation, and uploads the contract, invoice, and compliance template.
- **Payment:** On successful three-point validation, the system triggers payment.
- **Exceptions:** Any claims that are not believed to be legitimate are flagged for the user. This allows the system to handle 95% to 99% of the claims automatically without involving the user.

The key to being able to do this lies in proprietary data extraction, pattern recognition, and language correction capabilities that help to overcome input issues such as poor-quality scans and damaged documents.

There is obviously more to it than this, but our purpose here is not to create an exhaustive description nor give away the Contract Assistant "special sauce," just highlight that it represents a unique way to create agreements where they have been overlooked and take care of deductions on the back end.

The benefits: The benefits are legion and are documented based on the experience of a multination CG company. They include:

- Reducing the drudgery on the field force of creating contracts, researching claims, and clearing deductions. In other words, happier and more productive sales people as well as those who support through the promotion cycle.
- Improving the accuracy of contracts, boosting governance and visibility.
- Providing a repository of relevant documents for years to come as a bulwark against spurious claims.
- Reducing write offs from claims that are below the under-cash tolerances limits. Also, being able to lower these limits to just a few dollars because the solution can chase them more quickly and cost effectively than a human.
- Improving cash flow by quickly initiating charge backs for invalid deductions.
- Increasing net revenue annually from reduced promotion over payments as a result of 100% three-point payment validation.
- Faster insights through the post event analysis process.
- Less margin leakage through overpayment of claims.

Genpact's Contract Assistant is a product offering that comes with support services from an initial assessment through to implementation. We found it to have a very modern interface, unlike some claims management modules of TPx solutions we have reviewed that are just a notch above green screens.

We believe this enabler to be complementary to current TPx capabilities featured in this report as a way to focus more on insight generation and collaboration instead of promotional housekeeping.

Clarity Insights clarityinsights.com

Perhaps you have found that your legacy, or some more contemporary TPx solutions, are a bit light in the area of analytics or as an end-to-end discipline. Clarity Insights is an analytics firm with a demonstrated ability to improve promotional outcomes across the entire process through a combination of technologies and services that can bolster existing TPx investments. They refer to themselves as "Data Heroes," which is apropos given the data challenges that we have already covered in this report. Here are a few areas where we see Clarity Insights as being complementary to the promotion cycle:

1. **Data management in general** - In various places throughout this report we have highlighted the need for CG companies to harness the value of their data as well as be able to potentially bring additional data sources to bear. This means acquiring, cleansing, harmonizing, and staging the data so that it can be effectively utilized to drive insights and perform business processes. Clarity Insights does this through Data Integration Accelerators for improving time-to-value for managing the data integration journey (from raw data to Insights) in building analytics capabilities by shrinking the time and effort required.
2. **Monitoring promotions in flight** - Part of the having data acumen is the ability to quickly ascertain whether promotions are performing as per contract. This means harnessing data from POS, brokers, crowdsourcers, and internal retail execution systems to provide insight into what is happening at the store level - and do so with minimal latency - so that corrective action can be taken while the promotion is in progress. This stands in stark contrast to the more typical frustration that takes place upon realizing that a promotion that ended several weeks back wasn't in compliance because somebody didn't get the shippers out of the back room and assemble them or speak to the store manager about the benefits of doing a secondary display. This monitoring can also shine light on out-of-stock situations that cause promotions to underperform - and do so while the promotion is still running.
3. **Avoiding questionable charges or activities during settlement** - Proper application of analytics and utilization of underlying data sources can highlight activities such as product diversion and "double dipping for promotions" that have already run. These can be highlighted as part of the promotional evaluation so that a chargeback can be initiated instead of just clearing the deduction and suffering margin erosion.
4. **Post event evaluation** - This includes doing more automation of analyzing promotional effectiveness as well as bringing more accuracy to bear based on actual product pull through as opposed to just shipments. Some of this may be accomplished from within the TPM solution or as an adjunct capability, depending on individual company requirements.

5. **Predicting promotional outcomes and optimizing them** - Many legacy TPM as well as contemporary TPM solutions have no TPO module. And then again there is the situation where you are still using spreadsheets for TPM but want to do some predictive modeling and begin to garner insights. Clarity Insights can provide technology and expertise to bolster what you already have and move you to the next level. Clarity Insights does this through its Trade Promotion Predictor & Optimizer offering- a simulation, what-if, and scenarios-based capability to create and evaluate promotional scenarios and help create an optimal calendar for executing trade activities ensuring business outcomes (margin, profitability, growth).
6. **Trade Analytics Tool Selection** - Clarity Insights is vendor-agnostic and has partnerships with multiple software vendors in the space and can help clients' end-to-end from selection to implementation. In addition, its data architecture/ integration expertise (as opposed to being what they call 'tool jockeys') allows them to integrate the tools optimally within a client ecosystem.

In summary, Clarity Insights has technology and services options that can wrap around several of the sub-processes within trade promotions to help you leverage existing investments or accommodate for their shortcomings. They are indeed Data Heroes.

Vendors not included this year:

- POI is not featuring ITC Infotech, because we believe that they are not actively attracting new clients over the last few years and due to their lack of focus on the UX.
- Klee Commerce has not responded to our requests for information.
- Oracle asked not to participate this year, as they have a new policy about participating in any analysis of its on-premises TPx solution and because a cloud solution is still in the planning stages.

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, the capabilities 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 Authors

Pam Brown has joined POI as Chief Commercial Officer. In this role, she will create and execute POI strategy, research, advisory plus elevate practices, and CPG and Retailer relationships. Most recently Pam was the Director of IT Governance for Del Monte Foods. In her role she led IT Governance and the PMO. In her previous role as the Director of Sales Operations, she led Sales Strategy & Operations, Sales Systems and BI Analytics.

Pam joins the POI leadership team with relevant experience with leading processes, tools, and change transformation. Pam's extensive knowledge of CPG, data and technology expertise, and deep personal relationships with many of our members will be extremely valuable to POI as we continue to serve our manufacturer, retailer, and vendor members with leading practices.

Pam has current, extensive knowledge in TPM, TPO, ROI, Revenue Management, Advanced Analytics, Change Management, Sales and Sales Effectiveness, Demand Planning, Supply Chain and other relevant best practices areas that will generate new opportunities for POI and our vendor partners. Over the years she has researched, designed, and deployed Enterprise wide solutions to meet business needs. She understands how to execute and gain user adoption of new systems for physical retail and eCommerce. She has advised solutions providers on enhancements to core capabilities and partnered with other CPG manufacturers to share, learn and drive best practices in today's challenging retail and consumer goods environment for mutual benefit. As CCO at the POI, one of Pam's keys roles will be to oversee the global trade association's thought leadership and best practices advisory services. Pam has served on the POI board since 2011. She also serves in a broad array of community and industry leadership roles, including the Network of Executive Women.

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Dale Hagemeyer has been active on the POI Board since its inception and currently leads the research arm of POI. 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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