



**Perfect Promotion
Perfect Store
Perfect CX**



Welcome to the Promotion Optimization Institute!

Michael Kantor
CEO and Founder
Promotion Optimization Institute (POI)



Time Flies when you're Constantly Evolving – 10 Years!

November 2008 – POI Founded at the Beginning of the Great Recession

June 2010 – POI Charting Your Course to Trade Promotion Optimization Research

March Nov. 2011 – POI Inaugural Spring and Fall North American Summits

June 2013 – POI Graduates the First Certified Collaborative Marketers (CCM)[™]

May 2015 – POI Inaugural European Summit, Geneva

March 2016 – POI Retail Execution Vendor Panorama

September 2016 – POI TPx Vendor Panorama, and Inaugural RE Summit

April 2018 – Launch of POI eCommerce Business Leadership Council

June 2018 - Welcome Pam Brown, Chief Commercial Officer, POI!

November 2018 – Promotion Optimization Institute's 10 Year Anniversary!

April 2019 – POI Next phase of growth & evolution (POI Transformational Leadership Council, Share Groups, POI Toronto, EBLC, CCM going Global)

Promotion Optimization Institute • Spring Summit 2019 • Chicago, IL

Certified Collaborative Marketer (CCM)[™]

CCM Executive Training/Certification

- 90% Online delivery
- Executive Program held at St. Joe's University in Philadelphia, PSU, ASU
- Learn Collaborative Cultures, Skills & Strategies
- Two day live kick-off, 16- week self directed study, 2 day final collaborative workshop June 19-20, 2019
- <http://www.poinstitute.com/certification/certification-ccm.html>





#POICHICAGO19

How POI Serves Manufacturers and Retailers

Obtaining Best Practices: the Promotion Optimization Institute

Facilitates Your Learning Style



Broad coverage of collaborative TPx, retail execution and analytics

Outcome	Meet people with similar challenges, projects, and phases	Interact with leading technology and service vendors	Hear the good and bad from those who along the journey	Give me appropriate documents to read, and share with my team	Help me work through my unique situation	Certify me as a "Collaborative Marketer" CCM™
Avenue	Peer networking ☑	Vendor access ☑	Case studies ☑	POI research ☑	Access to subject matter experts ☑	16 week on-line course of study and certification
POI Role	POI industry events, share groups, and personal introductions	POI Industry events bring sponsors and user organizations together	Presentations at POI events, written documents, Webinars, Meet with your team	Guidance on appropriate readings as well as open access to POI resources	1 on 1 discussion format with POI leaders and all resources	POI runs academic program at St. Joseph's University (and others) – Collaborative Marketing.

POI View – Holistic Planning



Holistic Process Transformation Required:

Duplicative work effort is exerted across the organization & hinders “one version” of the truth

CMO	CCO	CFO	Varies by Company	COO	CIO
Marketing	Sales	Finance	RGM	Demand Planning	Technology
<ul style="list-style-type: none">• Pricing & lift coefficients• Baseline	<ul style="list-style-type: none">• Pricing & lift coefficients• Baseline• Incremental• Discount depth & frequency• Assortment & mix• Spend	<ul style="list-style-type: none">• Pricing & lift coefficients• Baseline• Incremental• Spend	<ul style="list-style-type: none">• Pricing & lift coefficients• Baseline• Incremental• Discount depth & frequency• Assortment & mix• Spend	<ul style="list-style-type: none">• Pricing & lift coefficients• Baseline• Incremental	<ul style="list-style-type: none">• Partner to develop & deploy business technology requirements

Solution 1: Holistic Data Transformation and Management

Solution 2: Enterprise Data and Analytics - COE



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Please sign up now if you have not done so already:

1. POI Informal Lunch Topic Tables
2. New POI Deep-Dive ROI Workshops for Friday 10-12:25
 - A. Best Practice Workshop to Optimize ROI on Your Data & Analytics Investment
 - B. Best Practices Workshop on Retail Execution and Monitoring Across Channels
 - C. Advancing eCommerce and Digital Commerce with Amazon and Other Omnichannel Retailers
 - D. Best Practices with Tools and Services to Advance Trade Promotion Management and Optimization

Upcoming Events in 2019

YOU
ARE
HERE

SPRING
SUMMIT 2019

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April 3-5, 2019 | JW Marriott Chicago

POI European Summit



Successfully Navigating Growth
in the New CPG and Retail World
14-16, May, 2019 | SS Rotterdam

The POI Canadian Summit

Driving Profitable
Growth North!



June 12-13, 2019 • Toronto, Ontario

THE POI NORTHEAST REGIONAL SUMMIT

Achieving Growth Through
RGM, Retail Execution,
eCommerce, and
Analytics Excellence



September 25-27, 2019 | Hyatt Regency Morristown, NJ

Collaborative Marketing Driven by Advanced Analytics Summit

Ensuring Your Successful TPx
and Retail Execution Journey



November 6 - 8, 2019
Westin Galleria Dallas

The Only
Designation for
Marketing &
Merchandising
Collaboration

June 19-20,
2019



Your TPx-RGM - Retail Execution and Global Collaboration Journey



POI Research, Advisory, Webinars, Workshops, and Membership



Education, Share Groups, Training and Certification