



# POI European Summit

Successfully Navigating Growth in the New CPG and Retail World



#POIEUROPE19

## Welcome to the Promotion Optimization Institute!

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CEO and Founder  
Promotion Optimization Institute (POI)



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Welcome Aboard!





# **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)<sup>TM</sup>**

**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)**

**May 2019 – POI 5<sup>th</sup> Annual European Summit – Aboard the SS Rotterdam – Next Steps to Growth!**

# Certified Collaborative Marketer (CCM)<sup>TM</sup>

## 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>







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# 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**

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

# 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"><li>• Pricing &amp; lift coefficients</li><li>• Baseline</li></ul>	<ul style="list-style-type: none"><li>• Pricing &amp; lift coefficients</li><li>• Baseline</li><li>• Incremental</li><li>• Discount depth &amp; frequency</li><li>• Assortment &amp; mix</li><li>• Spend</li></ul>	<ul style="list-style-type: none"><li>• Pricing &amp; lift coefficients</li><li>• Baseline</li><li>• Incremental</li><li>• Spend</li></ul>	<ul style="list-style-type: none"><li>• Pricing &amp; lift coefficients</li><li>• Baseline</li><li>• Incremental</li><li>• Discount depth &amp; frequency</li><li>• Assortment &amp; mix</li><li>• Spend</li></ul>	<ul style="list-style-type: none"><li>• Pricing &amp; lift coefficients</li><li>• Baseline</li><li>• Incremental</li></ul>	<ul style="list-style-type: none"><li>• Partner to develop &amp; deploy business technology requirements</li></ul>

Solution 1: Holistic Data Transformation and Management

Solution 2: Enterprise Data and Analytics - COE



# Upcoming Events in 2019

**POI European Summit**

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14-16, May, 2019 | SS Rotterdam

**The POI Canadian Summit**

Driving Profitable Growth North!

**POI**  
PROMOTION OPTIMIZATION INSTITUTE

June 12-13, 2019 • Toronto, Ontario

**THE POI NORTHEAST REGIONAL SUMMIT**

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

**POI**  
PROMOTION OPTIMIZATION INSTITUTE

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

**Collaborative Marketing Driven by Advanced Analytics Summit**

Ensuring Your Successful TPx and Retail Execution Journey

**POI**  
PROMOTION OPTIMIZATION INSTITUTE

November 6 - 8, 2019  
Westin Galleria Dallas





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**Getting There One Step at a Time**



**Transactional**  
Limited capabilities  
Business as Usual

**Manual but Collaborative**  
Performance gaps help identify goals and needs  
Beginning to understand components of optimization and key metrics  
Integrating data points  
Improved profitability


**Analytical/Technology**  
Rear-view approach

**TPQ - Trade Promotion Optimization**  
Created trading partner teams  
Able to integrate, interpret and share data, mutual KPIs

**Optimization & Collaboration**  
Have committed organizations to consistently contribute to the mutual profitability of the trading partner relationship  
Shared success in serving shared shopper consumers

Source: 2014 POI and Gartner research

# Your TPx-RGM - Retail Execution and Global Collaboration Journey



# POI Research, Advisory, Webinars, Workshops, and Membership



# Education, Share Groups, Training and Certification