

The Promotion Optimization Institute's Consumer Goods State of the Industry Research

# **Recalibrate Organizationally to Mitigate Economic Conditions & Gain Essential CPG Industry Efficiency & Growth**

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# POI State of the Industry 2025 Report

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As with our previous surveys, the 2025 Promotion Optimization Institute (POI) Enterprise Planning (EPx), Revenue Management, and In-Store Retail Execution (RetX) Benchmarking Survey focused on the intersection of the people, process, and technologies required to be a suitable collaboration partner in the promotion and distribution of consumer products.

Leading CPG Industry Retailers and Manufacturers prioritize building organizational resiliency by investing in holistic enterprise planning, omnichannel balance, revenue management, marketing, supply chain, and finding areas of efficiency with people, processes, and systems. As we begin 2025, the economy continues to be uncertain. Organizations continue to invest in automated capabilities that enhance visibility, provide strategic insights, improve decision-making, drive revenue, increase return on investment, and reduce costs. CPG leaders must recalibrate and build strategies to ensure efficiency and growth for their organizations.

If you are investigating new holistic enterprise planning solutions and want to know what's possible across EPx (TPM-What-if Scenarios-ROI), RGM/TPO, and the RetX space, you can review capabilities and vendor offerings in the POI EPx and Retail Execution Vendor Panoramas at: <https://poinstitute.com/membership>



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# Promotion Optimization Institute State of the Industry Survey & Report

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## Rationale Behind the Survey:

POI seeks to serve its members by identifying strategic leadership focal points and streamlining critical leadership success factors on hot issues and emerging trends while incorporating the 2024 benchmarking survey results. We look at the successes and challenges in promoting and distributing consumer products and then analyze them at global events and through written research, share groups, webinars, and advisory services. The focal areas of this survey were selected based on the summation of our beliefs about where the challenges exist today and a desire to socialize the topics and recommendations with CPG industry leadership.

\*Note that while most companies in the survey are constant year-over-year, the responders can change from one year to the next, influencing the research data.

## Attribution of the POI Survey Results and Report:

We have included a non-PDF version of the report on our POI Member portal to serve our members.

<https://poinstitute.com/membership>

This non-PDF version of the report will enable your organization to utilize report content efficiently. When using POI State of the Industry report information, it is critical for you and your organization to attribute POI and the POI 2025 State of the Industry report for the research, thought leadership, and industry insights utilized.

# Manufacturer Connect

This report includes industry insights gained from the 2024 State of the Industry Surveys, POI 1:1 manufacturer interactions, and the POI Manufacturer Connect Share Group.

The POI Manufacturer Connect has consistently met every 6-8 weeks over the past five years. This community is essential to navigating the CPG Industry, consumer behavior, omnichannel strategies, global economic changes, and new technologies.

This report and its insights will help you understand how your peers are building strategies to address the complexities of the rapidly changing retail landscape and how they plan to recalibrate organizationally to mitigate economic conditions and gain essential CPG Industry efficiency and growth.

For more information on joining the POI Manufacturer Connect please contact Joanie Malin, [jmalin@p-o-i.org](mailto:jmalin@p-o-i.org)



# CPG Industry Facts, Trends, Inflation, Outlook, C-Suite Focus, and Headline Insights



# Global Consumer Goods Industry by the Numbers



**\$21.13 trillion**

Global Revenue of  
the CG Industry



**\$2.8 trillion**

Projected Value Added in  
2024 in the CG market



**255,200**

U.S. Manufacturers



**2,320,000**

Global Manufacturers



**1,070,000**

U.S. Retailers



**2,232,000**

Global Retailers



**2,164,000**

Enterprises



**4.52%**

Increase of Global Consumer  
Spending Since 2021

# CPG Industry Facts



## CPG 10.5% of US Employment

- 1 in 10 jobs in America are in CPG
- \$22.3M American Jobs
- 3x the size of NYC



## Largest Manufacturing Employer in US

- \$195 Billion of labor income.



## \$2.5 Trillion GDP

- 10% of the National GDP is from the Consumer Packaged Goods Industry
- Larger than Canada's 2023 GDP



## \$1.5 Trillion in Salaries, Wages, Benefits

- 30% increase in wages in last 5 years
- For every CPG job there are an additional 7.3 jobs created in US



## Constantly Changing and Evolving

- Ecommerce and Digital
- Supply Chain
- Personalization
- Consumer changing desires



# Inflation

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As we enter 2025, there is news talk about potential lower levels of inflation, yet interest rates currently remain high. Average families are looking to seek the greatest value and quality for their hard-earned dollars. There continue to be geopolitical concerns in Ukraine and the Middle East, and we are keeping our eyes on Taiwan. Concerns loom about the impact of potential tariffs and how widespread they will be enacted. *The Forbes 2025 Outlook – 5 Trends That Will Impact The Economy and Markets* noted the following:

- November 2024 retail sales were up 4.1% year-on-year, according to the U.S. Census Bureau. Plus, personal consumption expenditures were up 5.5% year-on-year in November 2024, according to the U.S. Bureau of Economic Analysis.
- Solid spending from deleveraged consumers supported growth in 2024, and it also bodes well for 2025. Analysts project a 3-6% rise in global consumer spending for 2025.
- The U.S. GDP growth rate is likely to post the fastest growth rate of any advanced economy for a second consecutive year, according to Prestige Economics.
- Interest rates began falling in 2024, and more rate cuts are coming in 2025, according to the December Federal Open Market Committee projections.
- Fortunately, in 2024, the trends were quite positive, including ongoing net payroll gains, solid consumption, positive growth, easing inflation, and falling interest rates. The outlook for 2025 includes many of the same elements and tailwinds that were present at the beginning of 2024.

# Inflation

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While global consumer spending is projected to rise in 2025, underlying caution persists due to recent inflationary pressures and economic uncertainties. Businesses are responding with increased marketing efforts and discount strategies to align with evolving consumer behaviors.

Over the past three years, POI has emphasized the importance of pricing, volume, and mix analysis in achieving profitable, efficient growth. As leaders in RGM understand, these three elements are deeply interconnected and directly influence one another. In 2024, POI accurately predicted that CPG organizations would heavily utilize mix/brand portfolio analysis and price pack architecture to drive efficiency and mitigate economic conditions.

The new U.S. presidential administration, which took office in January, also creates significant uncertainty. It promised and is delivering stiff tariffs on imported goods. Increased tariffs can affect the economies of the countries on which they are imposed and could also lead to higher prices in the U.S. for consumer goods. Any increase in prices because of tariffs is expected to result in a pullback in consumer spending across the U.S., something the U.S. President's administration will seek to avoid.

**The Time Is Now To Ensure Your  
Organization Recalibrates Organizationally  
to Mitigate Economic Conditions & Gain  
Essential CPG Industry Efficiency & Growth**

For Consumer Goods companies, anticipating 2025 spending patterns based on your brand portfolio and automating enterprise planning, revenue management, marketing, and retail execution will be essential to delivering your growth strategies. Analyzing tariff exposure in your supply chain and developing contingency plans will be key to minimizing the impact on your organization.

The POI State of the Industry report will help your organization understand how peer CPG companies are mitigating economic conditions and gaining essential efficiency & growth in 2025.

# POI Manufacturer Connect Insights on Planning, Spending & Inflation Trends:

- Consumers prioritize value and quality in their spending decisions.
- Consumers are all-outlet and online shopping to find the best deals. Yet, **76%** of CPG organizations haven't developed a robust omnichannel strategy.
- Retailers are promoting private label products as consumers seek quality and value, while branded manufacturers continue to optimize and implement defense strategies.
- Manufacturers are evaluating and optimizing their brand portfolio to understand volume, margin, and profitability efficiency metrics as they build mix and depth of promotion recommendations.
- Retailers and manufacturers continue to navigate new consumer buying behavior as they optimize trade investment and promotion levels. Both partners are focused on enhancing convenience and a frictionless experience for consumers.
- Revenue Growth Management (RGM) capabilities are increasing across all tiers of CPG manufacturers. RGM is utilized across organizations to drive efficiency and effectiveness of price, pack, mix, promotion, trade architecture, cost, and overarching strategy.
- Companies continue to focus on Integrated Business Planning and supply chains to improve enterprise forecasts and execution, ensuring the right product is delivered to the right place at the right time with enhanced efficiency for profitable growth.
- Manufacturers remain cautious due to the complex price environment and potential new tariffs. Manufacturers must deliver quality, value-oriented products that are also revenue-accretive for both them and the retailers.



# The Potential Impact of Import Tariffs on the CPG Industry

## IMPORT TARIFFS

After years of unprecedented price increases and record inflation in CPG, tariffs could significantly impact international trade and domestic markets and lead to additional price and cost concerns as manufacturers plan for 2025 and beyond.



### Potential Pricing Impacts on Tariffs

- Direct impact on import prices as tariff costs are passed directly to consumers.
- Indirect effects on domestic prices as increases in imported goods could allow domestic producers to also increase prices.
- Supply Chain impacts as it could disrupt the global supply chain for imported raw materials or components or affect transportation capacity and costs.



### What Manufacturers Can Do To Prepare

- Once tariff details are known, frontloading commodity imports could be a temporary solution, but diversified sourcing will be critical in the long term.
- Evaluate supply chains for vulnerable areas to tariffs. Evaluate at the supplier level, as even tier two or backup suppliers could have exposure. Monitor transportation costs and impacts as well.
- Remain flexible as new details emerge and be comfortable changing direction and making contingency plans as the year progresses. Adaptability is key.

# CPG Industry Outlook:

2025 will be a year of adjusting and restructuring organizational processes, priorities, or strategies to better handle challenging economic conditions and achieve efficiency and growth within the CPG industry. Below are POI Member focus areas:

- 1. Recalibrate Organizationally:** Modify or realign internal processes, strategies, or structures to adapt to changes or challenges.
- 2. Mitigate Economic Conditions:** Address and reduce the negative impact of economic challenges (e.g., inflation, supply chain issues, or potential market downturns).
- 3. Gain Efficiency:** Improve operational performance and streamline processes.
- 4. Growth:** Deliver innovation and achieve business expansion & market development.

The focus is on recalibrating, preparing, and transforming CPG organizations to excel during challenging economic times, with a strong emphasis on efficiency and growth.

The POI State of the Industry Survey reveals that manufacturers are committed to investing in technologies that automate and transform their organizations, driving cost savings, enhancing cross-functional processes and visibility, and enabling efficient growth.

# Preparing for Growth



## Create an Organization That Can Respond Agily

- Consumer
- Retailer
- Supply
- Internal organization



## Share and Learn From Industry Peers

- Manufacturers/Retailers
- Trade Associations (i.e., POI)



## Establish Internal & External Collaboration

- Consumer
- Retailer
- Supply
- Internal organization



## Redefine Enterprise Strategies for Efficient Growth

Including product assortment, marketing and trade strategy, supply chain, work-from-home practices, M&A, Divestitures, etc.



## Redevelop an Enterprise Execution Plan

Internal and consultative resources focused on delivering strategic priorities.



## Prioritize I.T. Investment Plans

Digital, Enterprise Planning, Supply Chain, Optimization & Advanced Analytics (Intelligent Enterprise Data & Analytics Driven AI/ML Models), Ecommerce, and D2C.

# C-Suite Focused:

## (Managing Risk, Setting Strategic Direction, & Building Culture)



### Cost Management

Ongoing evaluation of sourcing, cost of goods containment & pricing, total cost-to-serve, and recession-proofing the business. Pilot new technologies to de-risk capital investments. Evaluate tariff impacts to supply change and develop contingency plans.



### Holistic Enterprise Planning, Enhanced Forecasting & RGM Capability Advancements

End-to-end planning maximizing cross-functional insights to deliver strategic objectives and efficiencies to enable Joint Customer Business Planning. Increased focus on Integrated Business Planning to improve coordination between marketing, sales, customer development, finance, demand, and supply teams. Ultimately improving the forecast and customer experience.



### Digital Supply Chain

Focused on resiliency, agility, and sustainability, not only efficiency, so the organization can respond quickly to shifts in consumer demand. Enhancing inventory management and distribution, including real-time inventory visibility. Developing collaborative partnerships to improve the fulfillment experience, especially in the areas of click-and-collect and direct store-to-consumer shipments. Building redundancy across the value chain is also a priority.



### Employee

Safety, personal & mental health, work-life balance, diversity, wage equity, and social goals. Create a new culture of the future for the organization. Includes recruitment and retention. Adjust critical resources and talent to support a defined growth plan.



### Historical Organizational Priorities:

- Disruptive Innovation (including increased ready-prepared meals)
- Right Brand Portfolio & Assortment (Omnichannel lens & balance)
- Competition: Defend against new agile challenger brands & increase in Retailer private label
- Acquisitions, mergers, and divestitures
- Sustainability & clearly communicated brand values

# Organizational Focus:

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Manufacturers are recalibrating organizationally to adapt to economic challenges, technological advancements, and shifting market demands. Below are some of the top ways they are doing so:

## 1. Restructuring Teams and Hierarchies

- **Cross-Functional Collaboration:** Breaking down silos by creating cross-departmental teams for faster problem-solving and innovation.
- **Flattening Organizational Structures:** Reducing layers of management to improve decision-making speed and foster direct communication.
- **Agile Leadership Models:** Adopting flexible and adaptive leadership approaches to respond quickly to market and operational changes.

## 2. Prioritizing Digital Transformation

- **Adopting Cloud-Based Tools:** Shifting to cloud platforms for better data integration, real-time insights, and collaboration across departments.
- **Digital Twin Technology:** Using virtual replicas of processes or systems to simulate, test, and optimize operations before implementing changes.
- **Intelligent Manufacturing:** Leveraging technologies like artificial intelligence (AI), and machine learning for real-time decision-making and automation.



### 3. Workforce Development and Upskilling

- **Employee Reskilling:** Training employees to work with advanced manufacturing technologies such as robotics and data analytics tools.
- **Change Management Programs:** Preparing teams to embrace new processes, tools, and organizational changes effectively.
- **Flexible Work Models:** Incorporating hybrid work options for non-production staff, such as remote work for planning and administrative functions.

### 4. Workforce Development and Upskilling

- **Centralizing Functions:** Consolidating functions such as procurement, supply chain management, and HR to improve efficiency and reduce costs.
- **Process Standardization:** Aligning workflows and standardizing operational procedures across global or regional facilities to ensure consistency.

### 5. Rethinking Supply Chain Strategies

- **Localized Production:** Moving production closer to end markets to reduce shipping costs and avoid disruptions.
- **Supplier Diversification:** Partnering with multiple suppliers to mitigate risks of shortages or delays.
- **Inventory Optimization:** Implementing "just-in-case" strategies alongside "just-in-time" to balance cost efficiency with resilience.



## 6. Realigning Business Priorities

- **Product Line Rationalization:** Reducing complexity by eliminating underperforming SKUs or product lines.
- **Sustainability Goals:** Shifting organizational focus to green initiatives, such as reducing carbon emissions, which align with regulatory requirements and consumer expectations.

## 7. Enhancing Decision-Making with Data

- **Data-Driven Culture:** Promoting data literacy among employees to make informed decisions at every level.
- Holistic Enterprise Planning, Enhanced Forecasting & RGM Capability  
**Advancements:** Optimizing enterprise investment and planning to deliver optimal efficiency, effectiveness, and growth.
- **Real-Time Reporting Tools:** Using advanced analytics platforms to provide instant insights into operations and market trends.
- **Predictive &/or Prescriptive Analytics:** Utilizing AI-powered tools to forecast trends, demand, and risks, enabling proactive rather than reactive strategies.

## 8. Fostering Innovation

- **Internal Innovation Labs:** Establishing dedicated teams or labs to experiment with new ideas and technologies.
- **Collaborating with Startups:** Partnering with innovative companies to co-develop solutions and access cutting-edge technologies.

## 9. Strengthening Organizational Resilience

- **Scenario Planning:** Preparing for multiple future scenarios (e.g., economic downturns, supply chain disruptions) to stay agile and proactive.
- **Risk Mitigation Frameworks:** Identify vulnerabilities and implement strategies to minimize their impact.
- **Crisis Management Teams:** Building dedicated teams to respond to unforeseen challenges effectively.

## 10. Aligning Organizational Goals with Market Demands

- **Customer-Centric Approach:** Reorienting organizational goals to meet evolving customer needs and preferences.
- **Focus on Personalization:** Shifting operations to support customization in products and services.
- **Speed-to-Market:** Improving production and delivery processes to bring products to market faster.

## 11. Marketing and Innovation to Reach Consumer Desires

- **Holistic investment focus:** Break down siloes between sales and marketing to plan marketing and trade investments that synergistically drive growth and efficient spending.
- **Omni-measurement:** Enabling organizations to make more informed decisions on the impact of marketing and trade investment activities.
- **Relevant messaging:** Advertisers must pivot towards strategies that leverage first-party data and contextual advertising rather than relying on third-party tracking with the loss of third-party cookies.

### Key Outcome:

By implementing these strategies, manufacturers are positioning themselves for long-term growth, efficiency, and adaptability. This recalibration ensures that they lower costs, enhance productivity, and improve overall efficiency so they stay competitive, relevant, and resilient in a rapidly evolving industry and market conditions.

# POI 2025 State of the Industry Overview Insights

Enterprise planning & revenue management capabilities are essential to CPG organizations building efficient growth for 2024 & beyond. [This report will further elaborate on these insights.](#)

**61%**

of the respondents agree that their companies face difficulties in executing promotions as planned.

**24%**

of companies received an increase in net sales with their TPMx implementation.

## **To transform trade efficiency our company needs to improve:**

- Post-event analytics
- Volume planning accuracy
- Promo planning what-if scenarios
- Accurate systems & capabilities

**40%**

state proper data cleansing, harmonizing and staging the data is holding them back from delivering trade promotion optimization and analytics.

**39%**

of companies will be embarking on new TPMx systems.

**39%**

will deploy what-if promotion scenario capabilities.

**39%**

will deploy post-event analysis tool.

**34%**

will embark on automated pricing capabilities.

**22%**

Will implement a holistic TPMx tool that has TPM, ROI, and what-if scenarios in one platform.

**51%**

of companies state their headquarter support teams don't have the necessary capabilities to support pricing, trade allocations, and go-to-market strategies.

**33%**

of companies searching for new Foodservice capabilities do so to handle complex pricing.

**38%**

of companies are held back from exceptional retail execution due to data and insights not being fully leveraged.

**31%**

respond they are lacking retail execution technology.

**21%**

of companies are spending between 11-15% of annual revenue on trade promotions.

## **To move the needle on RGM efficiency our company needs to improve:**

- 49% of respondents stated pricing
- 42% overall strategy
- 56% trade promotions analytics and optimization
- 26% define growth drivers

**43%**

agree there are challenges moving retail execution user capabilities from transactional to analytical.

# Recalibrate Organizationally to Navigate Economic Challenges, Drive Efficiency & Growth, and Effectively Meet Consumer Needs and Desires

- **Establishing a data-driven culture (People, process and systems)**
- **Construct a flexible, yet secure, technical infrastructure**
- **Increase automation and scalability; move capabilities to the cloud**
- **Incorporate AI/ML and digital capabilities across people, process and systems to increase efficiency and transform strategy**



## **Omnichannel Balance & Execution Excellence**

Includes RGM practice development, winning the digital shelf, retail media, evaluating and updating go-to-market strategies (GTMS), and Direct-to-consumer (D2C). It encompasses multi-faceted marketing and promotions (spending is blurring). Ensure a frictionless, seamless consumer experience, especially between the physical store and digital online. Focus on convenience: Auto replenishment subscriptions and faster/easier delivery options.



## **Customer Experience**

It centers upon a 360-degree view of the consumer, including personalization and the entire consumer journey. It incorporates consumer buying behavior changes, their impact on specific brands/categories, and mobile-driven store and set designs.

# Today's CPG Manufacturer and Retail Organizations are Looking to Recalibrate and Achieve Efficient Growth

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The number one **focus is the consumer**, yet models and systems have been internally focused and not optimal.

Organizations need to step back and create a **"Holistic Enterprise"** de-siloed approach.

Based on one **foundational data** model.

To make faster decisions, meet consumer needs, and capture the value across the enterprise.

**Insights and Intelligence are the currency of collaboration.**



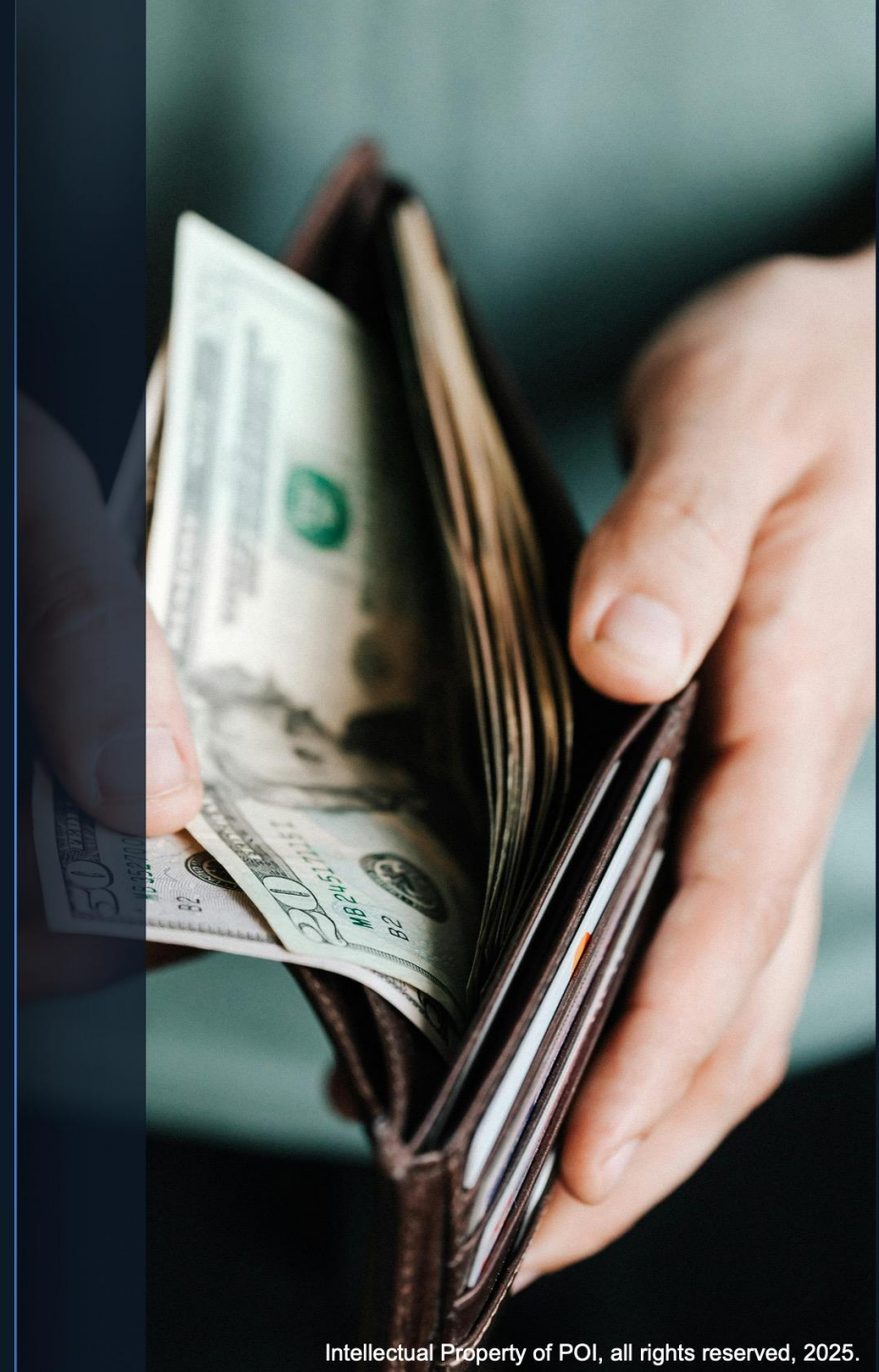
# Building Resiliency & Contingency Planning For the Unexpected

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As our global CPG industry, supply chains, and world economies are more connected than ever before, organizations need to prepare their data, systems, processes, and utilities to withstand disruptions and threats. Organizations need to build redundancy and resiliency.

World news continues to predict that catastrophic events and disruptions will become less predictable and yet more frequent. We have seen war, resource constraints, climate change, social justice, cyber threats, inflation, terrorism, and geopolitical unrest impact 2024, and we expect organizations will experience similar, if not greater, impacts in the future.

Organizations need to build resiliency, cyber security, and contingency plans now for the unexpected to maintain business and meet consumer needs if unexpected impact occurs.



# CPG Industry Drivers for Automation, Enterprise Planning & Optimization

**Global Pressure: Economic recovery, social strains, war, raw material costs, tariffs, higher fuel costs, and labor shortages.**

- Manufacturers look to **automate capabilities** to provide visibility, insights, cost savings, and the next best action to take based on current industry dynamics.
- **Understanding consumer sentiment** is critical. How brands need to be represented, promoted, and resonate during troubled times is critical to supporting our consumers through global dilemmas and pressures.
- Manufacturers must **advance Revenue Management practices**, including promotion, pricing, and mix scenarios. Price pack architecture analysis is a key workstream for innovation and brand efficiency. New insights must be presented to the retailers so they have options depending on how the market and consumers are behaving at the moment. Companies with optimization capabilities have been able to demonstrate increased levels of responsiveness and partnership with retailers.

**Solution Providers continue to develop exceptional capability advancements to support holistic enterprise planning in these dynamic times.**

Manufacturers are adopting optimization and RGM practices to enhance profitability, organizational efficiency, and effectiveness.

As trade and marketing investments overlap, their individual impact becomes harder to quantify. POI advises solution providers to develop new holistic enterprise capabilities that enhance visibility, measure total investment impact, and analyze consumer behavior drivers.

# Transforming From Business Unit Silos to an Agile Planning and Execution Enterprise

Organizations must step back and **create a “Holistic Ongoing & Dynamic Enterprise” de-siloed approach** to make faster decisions, meet consumer needs, capture value, and gain efficiency across the business units.



POI recommends establishing a robust enterprise data and analytics foundation powered by intelligent AI. This foundation should integrate comprehensive data management, enterprise-level analytics and reporting, executive dashboards, and the generation of actionable insights. A strong foundation for advanced analytics is crucial, as multiple business units across the enterprise rely on common denominators—such as baselines, lift coefficients, cost-to-serve, etc.—to drive consistent decision-making and unlock value, as illustrated in the accompanying image. This is also important as spending is blurring across marketing and sales due to Omnichannel and Retail Media advancements. Companies need to focus on total investment and cost-to-serve.

The Holistic, Ongoing, Dynamic Enterprise approach facilitates cross-organizational collaboration through consistent foundational data and methodologies. This strategy empowers manufacturers to meet retailers' multifaceted demands while effectively balancing product availability, supply chain dynamics, and profitability. Ultimately, it ensures the right product delivery at the right time and with the right offer to the consumer.

# Common Traits of Companies That Drive Efficient Growth During Challenging Economic Times

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- Deploy automated capabilities to increase visibility, productivity, and reduce costs. (Includes investigating areas where AI automation can be implemented)
- Invest in their revenue management practice. (Systems, process & people)
- They move thoughtfully, yet faster, and press into productivity to lower costs while pursuing efficient growth.
- Many retailers and manufacturers divest peripheral brands to free up capital for secondary acquisition of disruptive brands that are closer to their core growth strategy.
- Invest in top talent to strengthen internal growth and the company's future.
- Robust change transformation processes combined with a culture that embraces rapid experimentation and learning.

**POI maintains that these traits are critical to enabling a company to agilely mitigate headwinds, enhance profitability, outpace competition, and navigate global changes to achieve sustainable efficiency and growth.**



“ Companies must adapt and strategically recalibrate organizationally to mitigate economic headwinds, enhance profitability, outpace competition, and navigate global changes to achieve sustainable efficiency and growth. ”

Pam Brown, CCO, POI

# Holistic Enterprise Planning



# Holistic Enterprise Planning Evolution



## Improved ROI

Through post-event analytics and other promotion and pricing efficiencies.



## Improved Visibility

Enterprise visibility across the functions. Goal is one version of the truth.



## Optimization/RGM (AI/ML)

Enterprise promotion, pricing, trade architecture/segmentation, mix management, and assortment. (Not just the KAM lens)



## User Interface (UI)

Robust yet intuitive platforms with improved visualizations, interactive calendar planning, fewer clicks, dashboard, and reporting.



Evolution to TPMx



Holistic Enterprise Planning (EPx)



Evolving Digital/Omnichannel



**Prior to 2019**

**Excel, TPM, ROI, or TPO**

TPM systems were separate platforms from ROI or TPO capabilities, and planning required duplicative re-entry of ROI or TPO data into the TPM tool.

**2019**

**Excel, TPMx (TPM/What-if/ROI)**

TPMx solution providers enhanced the user experience by focusing on a “day in the life” of a planner. Incorporating TPM, What-if promotion scenarios, and post-event ROI evaluations in a single or modular platform eliminated duplicative re-entry of planning data.

**2020/2022**

**Excel, RGM Suite, EPx**

Advanced planning beyond traditional sales roles. Released HQ Planning, some Marketing planning & spending, as well as RGM and IBP capabilities. TPO terminology was retired with the advent of RGM Suites, which include advanced promotion and pricing optimization pillars. AI/ML was embedded to advance modeling and reduce the planning burden.

**2023/2024+**

**RGM Suite, Enterprise Planning (EPx)+ Digital, and Omnichannel**

Utilizing consumer data to drive Sales and Marketing planning. Enhanced focus on developing an enterprise, omnichannel, end-to-end value chain approach. Advancing AI/ML models.

# POI Summit & Manufacturer Connect Insights on Enterprise Planning Pain Points/Opportunities



Data isn't organized, cleansed, or staged. There isn't an owner of the data within the organization.



A lot of manufacturing companies are still using outdated TPM or TPO technology that lacks comprehensive EPx planning capabilities. This results in a higher administrative workload, less effective reporting, and the inability to generate insights or recommendations for the next best action. Analyzing data and deriving insights requires a lot of effort from a team of experts, making the process time-consuming.



Organizations need to be able to trust the models and analytics.



Building blocks and drivers need to be visible at the time of sales planning. Cross-functional use of new enterprise planning capabilities like just-in-time collaborative discussions between cross-functional teams through MS Teams or Slack can improve enterprise planning, monitoring, and agility to meet retailer and consumer needs. This will benefit the Integrated Business Planning process and improve the forecast.



Organizations need to have business answers quickly and accurately and understand the "whys."



Revenue Growth Management and headquarter dashboards and reporting are needed to analyze the next best action to quickly drive efficiency and effectiveness across the organization and with Retail partners.



Incorporation, visibility, and reporting on all funding aspects: digital, retail media, shopper marketing, eCommerce, trade promotion, and D2C. (Organization roll-ups generated out of data lake and visualized through end-to-end enterprise reporting).



To balance the business, leaders require visibility of full gross-to-net P&L management.



Enterprise teams need to utilize holistic enterprise planning common denominators across the cross-functional teams, which will help drive cohesiveness in the data, results, and "one version of the truth."

# What Manufacturers Are Trying to Solve With Holistic Enterprise Planning Capabilities:



## Automation – Reduce Burden

- Planning (AOP/HQ/Sales & Demand Planning)
- Baselines
- Enterprise Reports
- Analytics/ROI/Optimization
- RetX Perfect Store, Image Recognition & Connectivity
- 360 Consumer Insights



## Gain Efficiency

- Inflation & Cost Management including Total Spend (Trade +)
- Supply Chain
- Omnichannel Balance, including Pricing
- Enterprise planning
- Customer Experience
- Price/ Pack Architecture
- Assortment
- Volume Forecasts



## Enterprise Visibility

- Enterprise Dashboards & Reporting
- Total Spend
- Enterprise Planning
- In-flight & In-store Execution
- Omnichannel Factors/Impacts
- Price Elasticities
- Price/Pack Architecture
- Assortment
- Volume Forecasts
- Supply Chain



## Improve Process

- Data Management
- Enterprise Spend & Volume Planning
- Set Monthly Cross-Functional Connects
- IBP and JCBP
- TPMx/RetX Connectivity for In-flight Monitoring
- RetX Perfect Store
- Insights Consolidation and Socialization



## One Version Of The Truth

- Baselines
- Lift Coefficients
- Enterprise Reporting and Financials
- Spend & Volume Forecast Calls
- Unified Approach De-risks Decisions

# Journey to Improve Efficiency and Effectiveness Through Holistic Enterprise Planning



## TPM

- Transactional TPM
- Promotion Planning
- Baselines & Promo Uplift
- Financial Control
- Forecasting/Demand



## Execution Insights

- Pre & Post Promotion ROI Analysis
- Base Vs. Uplift – ROI
- Analysis of Promotion Tactics



## Prediction

- Advanced Baseline and Uplift Modelling
- Promotion Predictions – Multi Casual Modeling
- Pre & Post Forward Buy Effect
- Cannibalization Effects



## Trade Simulation

- Constraint-based What-if Promotion Simulation
- Promotion-level Predictive Analytics and Modeling
- Promotion P&L



## Strategic RGM

- Encompasses 5 Pillars of RGM
- AI Enabled Data Management
- Promotion, Pricing, Mix, Trade Architecture Optimization.
- Real Time Insights
- Profit Focused
- Incorporation of Consumer Behavior
- Category-level Analytics and Modeling
- Customer & Category P&L's
- Enterprise Revenue Mindset
- "One Version of the Truth"



## Holistic RGM

- Prescriptive Planning
- Intelligent Optimization Across RGM Levers
- Advanced Non-linear Models
- Demand Shaping Insights
- 25+ Constraints with Total Category Decomposition
- Strategic War Gaming

**Together, these capabilities deliver total Enterprise Planning (EPx) functionality.**

# To transform trade efficiency and effectiveness our company needs to improve: (Select all that apply and rank importance)

## 2024/25 POI State of the Industry Survey Respondents Stated:

|  | 2024/2025 | vs 23/2024 | vs 22/2023 |
|--|-----------|------------|------------|
| Volume Planning Accuracy                         | 1         | 2          | 2          |
| Data Cleanliness & Management                    | 2         | 5          | 1          |
| Post-event Evaluation (ROI Analysis)             | 3         | 1          | 4          |
| What-if Promotion Scenarios                      | 4         | 3          | 3          |
| Revenue Growth Management (Price/Promo/Mix etc.) | 5         | -          | -          |
| Promotion and Pricing Execution at Retail        | 6         | -          | -          |
| Pricing Optimization                             | 7         | -          | -          |

## Key Priorities for 2025

### Back to the Basics

Focusing on planning accuracy, promotion what-if simulations to improve results, and post-event analysis to evaluate promotion impact and success are critical priorities for 2025

**Volume Planning Accuracy** remains the top priority for 2024 and has consistently ranked among the top two efficiency priorities since 2023.

**Data Cleanliness and Management** remain important as organizations understand that advanced models and optimization need high-quality data.

**Post-event Evaluation (ROI Analysis)** is essential for year-over-year planning improvements. Since POI's 2018 survey, this focus has consistently been a top-four priority. It provides a quick path to enhancing promotion effectiveness.

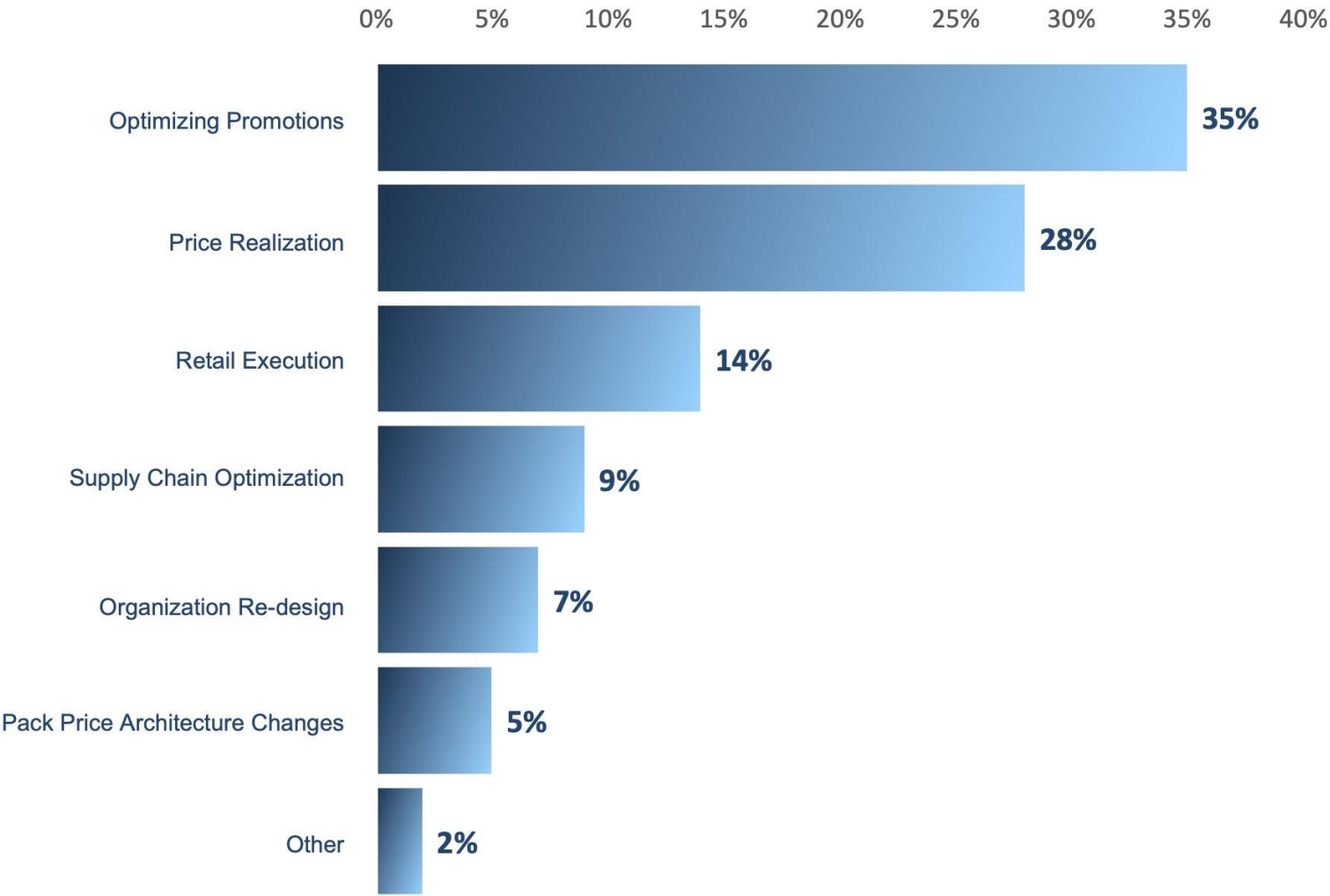
**What-if Promotion Scenario** predictive simulations are invaluable for sales and Revenue Growth Management (RGM) teams. They enable them to analyze promotion timing, duration, discount depth, and other variables to identify the most effective strategies for retailers and organizations.

**Revenue Growth Management** has secured a place among the top seven priorities, ranking #5.

**Pricing Optimization:** Manufacturers face growing challenges as consumer buying behavior indicates resistance to further price increases, signaling that many brands have reached a maximum threshold. Concerns over volume, share, and private label conversions dominate. Retailers are urging manufacturers to explore alternative efficiency solutions beyond pricing.



# Your organization’s biggest Enterprise Planning (EPx) growth opportunity for 2025:

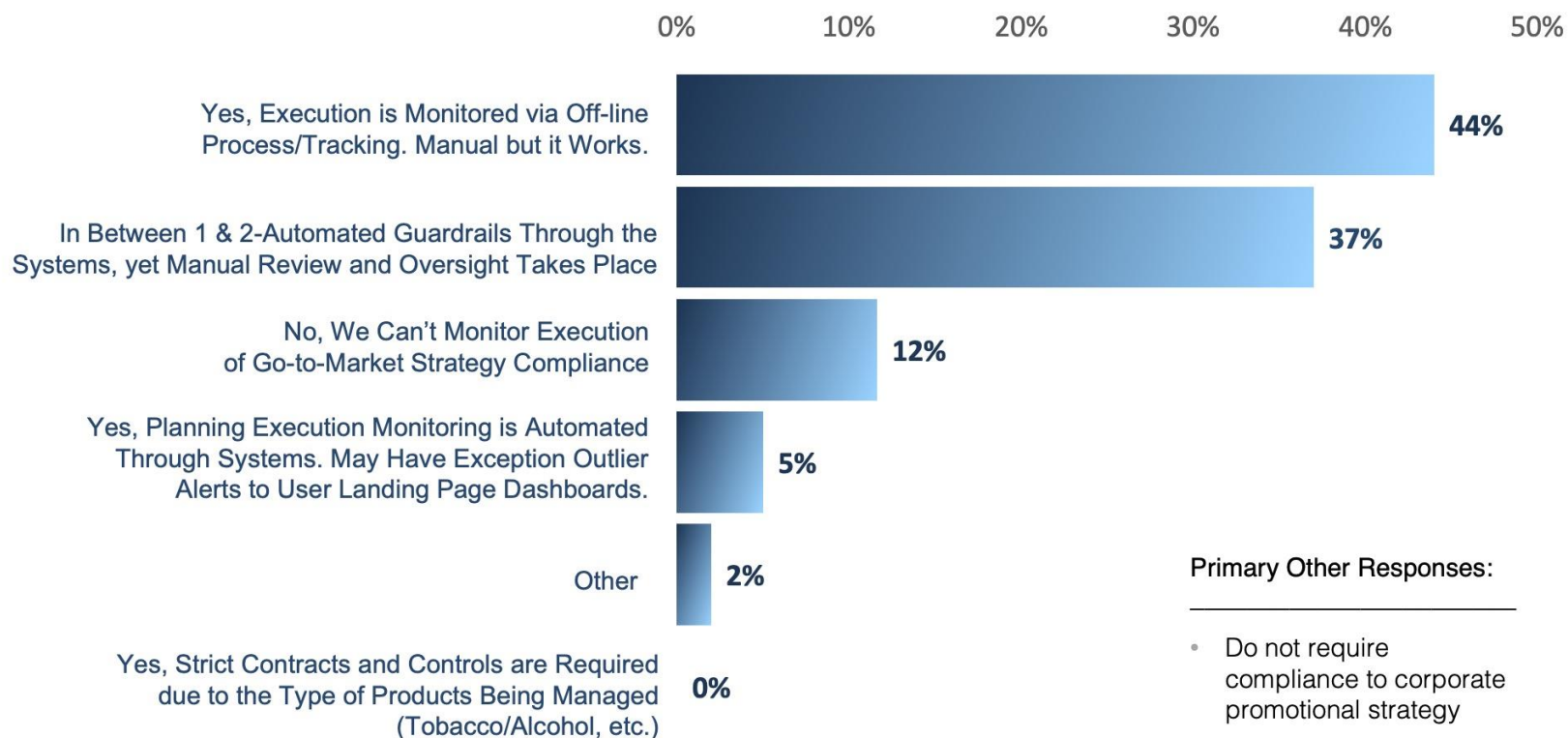


Optimizing promotions remains the top growth opportunity for organizations in 2025, as identified by **35%** of respondents.

This is closely followed by price realization (**28%**), highlighting a strong focus on revenue management strategies. Retail execution (**14%**) and supply chain optimization (**9%**) are also critical areas, reflecting the growing need for operational excellence in a dynamic market environment.

Additionally, organizational redesign (**7%**) and pack price architecture changes (**5%**) underscore the importance of structural and strategic adaptability in driving growth.

## Does your HQ planning team have the ability to monitor/manage go-to-market strategy compliance?



### Primary Other Responses:

- Do not require compliance to corporate promotional strategy

Based on the latest POI State of the Industry Survey, when asked if their HQ planning teams have the ability to monitor and manage go-to-market strategy compliance, **44%** stated they monitor compliance in manual offline trackers, **37%** have some automated guardrails but still utilize manual review, and **12%** are not monitoring compliance. Monitoring execution is critical to improving performance over time.

In addition, **51%** of respondents state that their headquarters support teams lack the necessary capabilities to optimize pricing, trade allocations, and go-to-market strategies.

## HQ Planning Capabilities...

have historically taken a back seat to sales planning functionalities. However, the landscape of vendor offerings and EPx platform capabilities has evolved significantly over the past five years.

Given the current state of the industry and the growing need for greater optimization, HQ capabilities are now becoming a priority for vendors. Despite this shift, many companies continue to rely on legacy technology platforms that lack robust headquarters or Revenue Growth Management (RGM) capabilities.

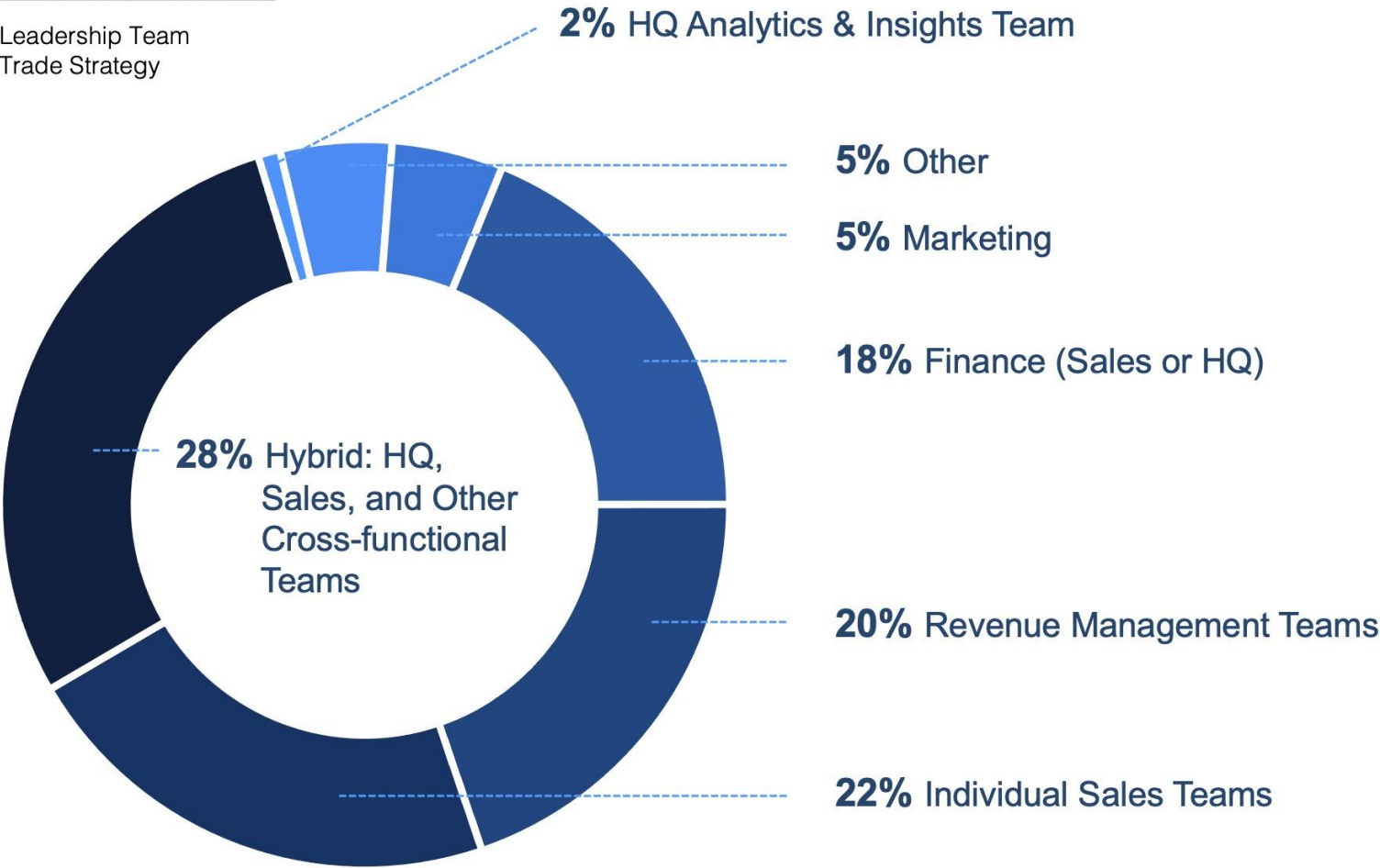
**For a detailed analysis of specific vendor offerings, consult the POI 2023 EPx Vendor Panorama report at [poinstitute.com](https://poinstitute.com)**



# Who makes the decisions around Enterprise Planning (EPx) trade investment allocation in your organization?

Primary Other Responses:

- Leadership Team
- Trade Strategy



Multiple automated capabilities are available to improve efficiency and effectiveness of trade:

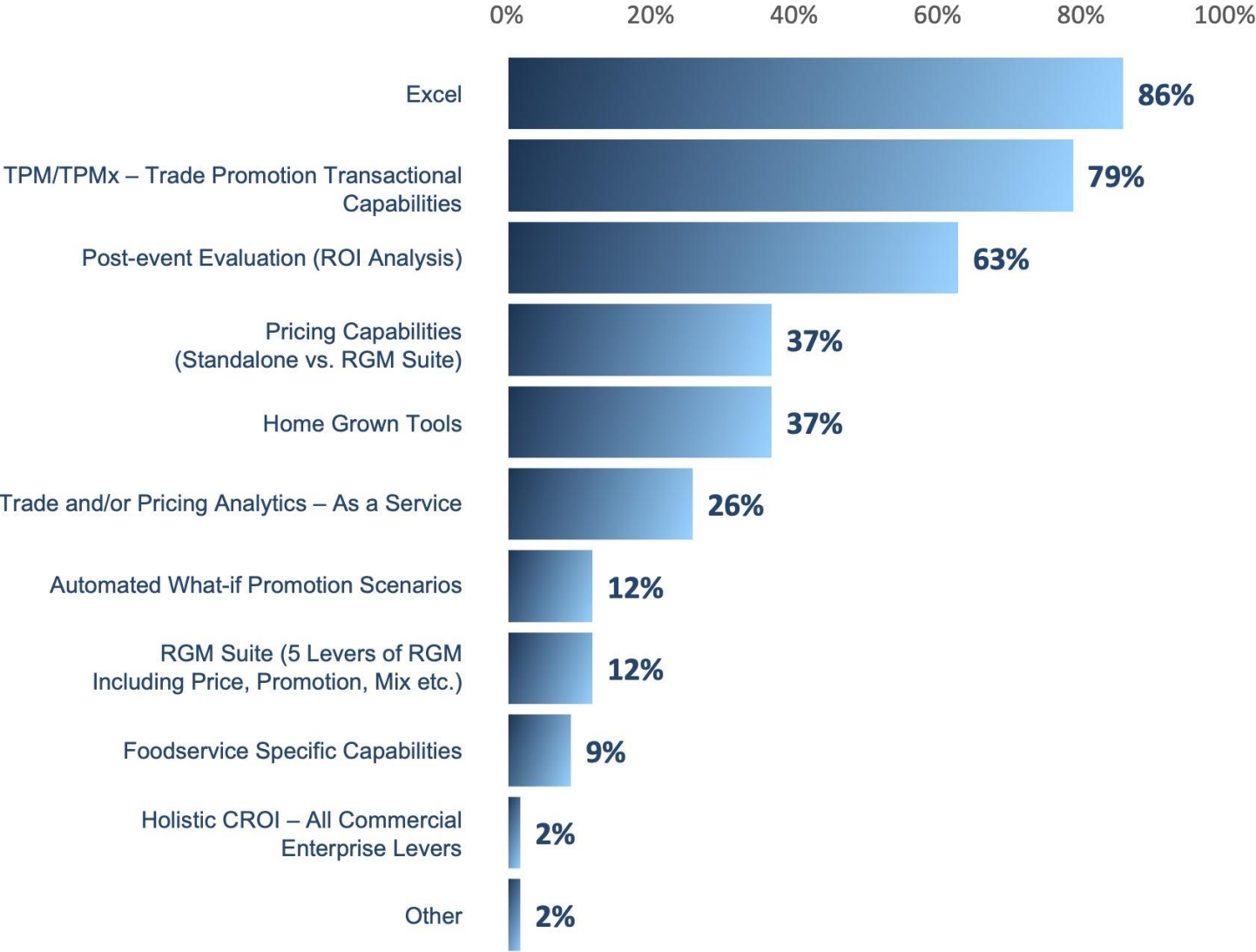
While multiple automated capabilities are available to improve trade efficiency and effectiveness, many CPGs still rely heavily on Excel. This can result in missed opportunities, siloed planning, and a lack of broad organizational reporting and communication. 86% of POI survey respondents use Excel in some way during the planning process to manage and drive efficiency.

Today, most vendors can deploy planning capabilities in one seamless, holistic TPMx planning platform, including trade promotion management (TPM), what-if promotion scenarios, and post-event evaluation (ROI analysis).

With recent dynamic industry changes, companies increasingly use RGM capabilities to uncover efficiencies, especially in promotion, pricing, and mix effectiveness, which have become critical priorities.

TPMx and RGM capabilities combine to create the Holistic Enterprise Planning Ecosystem (EPx).

Which of the following Enterprise Planning (EPx) technologies does your company currently use to manage & drive trade efficiency? (Select all that apply)



According to the POI survey, **39%** of respondents indicated that their organizations plan to deploy new TPMx systems. It is important to note that **68%** of companies already utilize TPMx systems. However, the survey does not specify whether these deployments involve transitioning from Excel-based processes to TPMx for the first time or redeploying from one TPMx system to another.

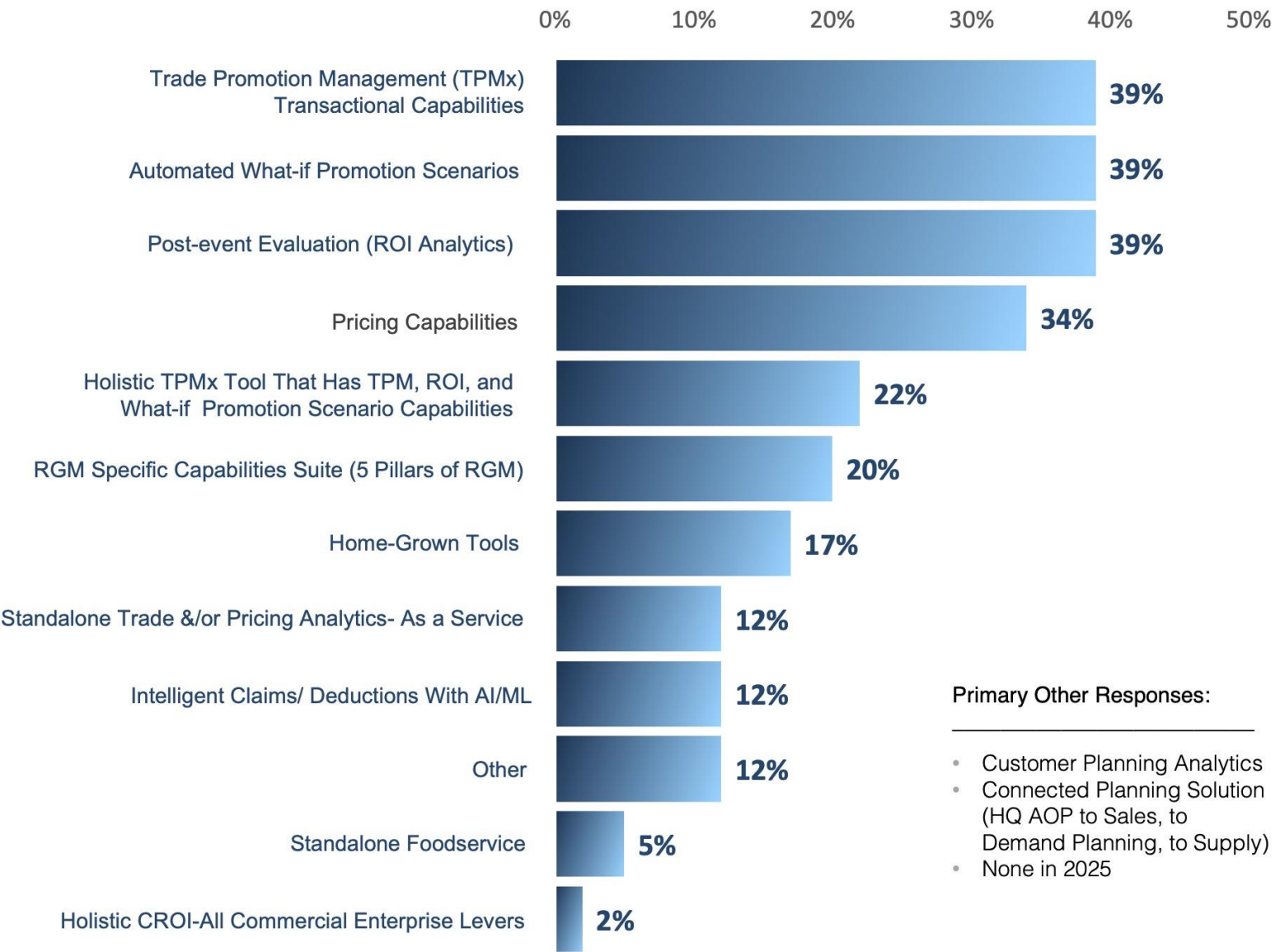
**Thirty-nine percent** of organizations plan to adopt what-if scenario capabilities, and an equal percentage intend to activate post-event ROI analysis. **34%** will be deploying standalone pricing capabilities. Additionally, **22%** aim to integrate TPM, ROI analysis, and what-if scenario planning into a single, comprehensive, holistic TPMx planning platform.

**Twenty percent** intend to procure RGM-specific capabilities to enhance efficiency.

**Twelve percent** of companies plan to implement trade &/or pricing analysis as a service. An equivalent number of respondents note they want to deploy intelligent claims/deductions with AI/ML.

Lastly, **5%** will embark to deploy a standalone Foodservice platform, while 17% plan to build out home-grown tools.

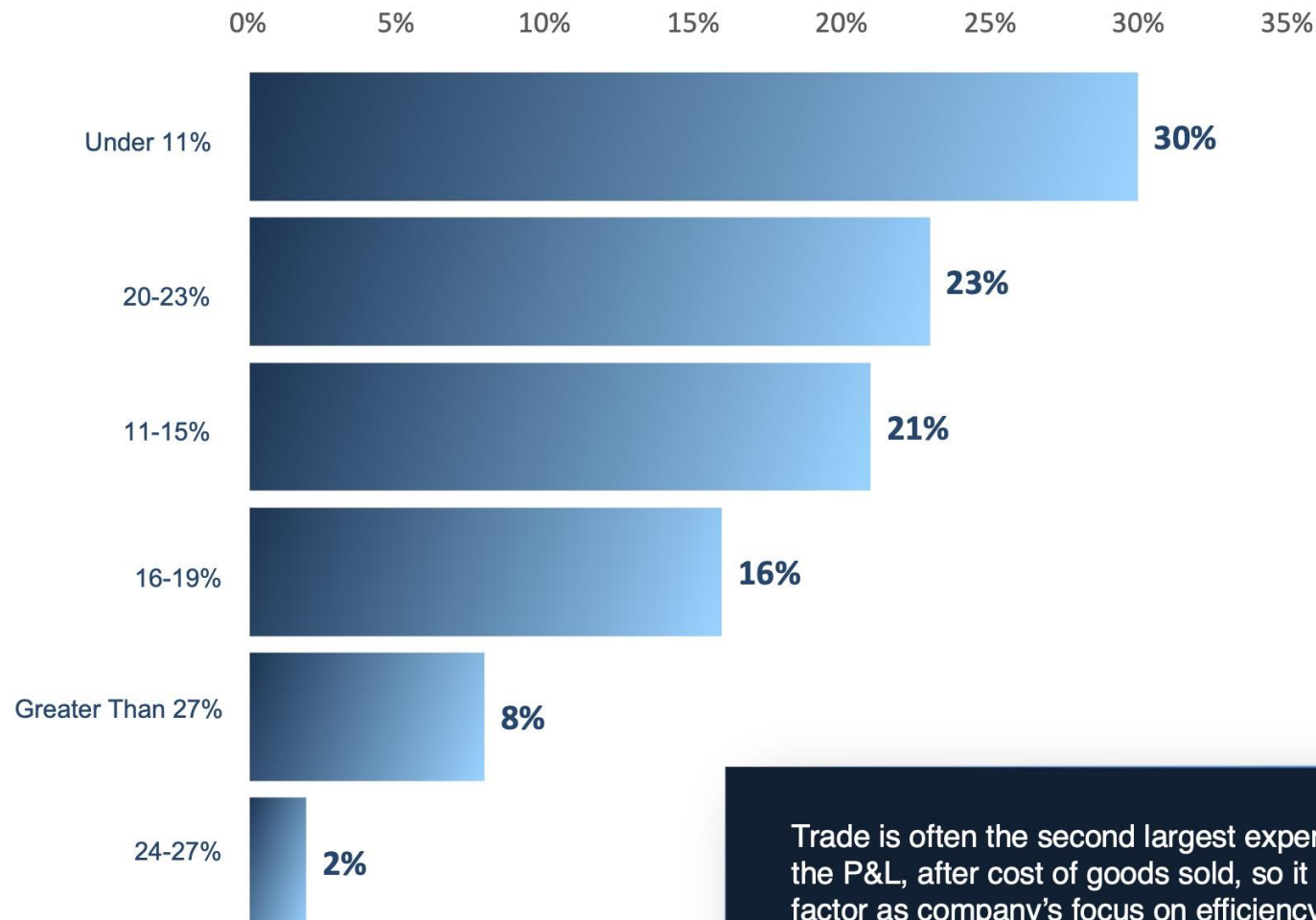
# Which of the following technologies will your company be embarking to deploy in 2024/25? (Select all that apply)



# Trade Promotion Management



## What percentage of your annual revenues do you spend on trade promotions?



Trade is often the second largest expense on the P&L, after cost of goods sold, so it is critical factor as company's focus on efficiency.

### Proper Allocation, Planning, & Monitoring of Trade Spend is Critical

Historically, CPG companies have spent between 11% and 27+% of revenues on trade promotions...

Current POI peer benchmarking reflects the following:

**30%** are spending below 11%

**23%** spend between 20 and 23%

**21%** spend between 11-15%

**16%** spend between 16-19%

**2%** spend between 24 and 27%

**8%** are spending over 27%



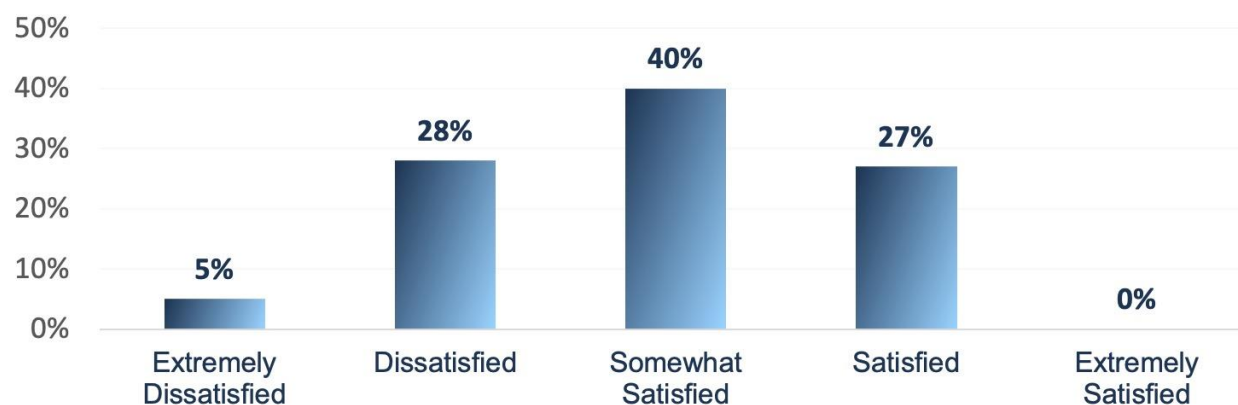
When respondents were asked if they were satisfied with their ability to manage trade promotions, **33%** were dissatisfied/extremely dissatisfied, while **67%** were at least somewhat satisfied.

As a shopper, digital, eCommerce, D2C, and other modern trade elements grow, it is essential to have trade management capabilities that can evaluate the opportunities (individually and total portfolio), appropriate a balanced enterprise funding allocation, and evaluate execution results.

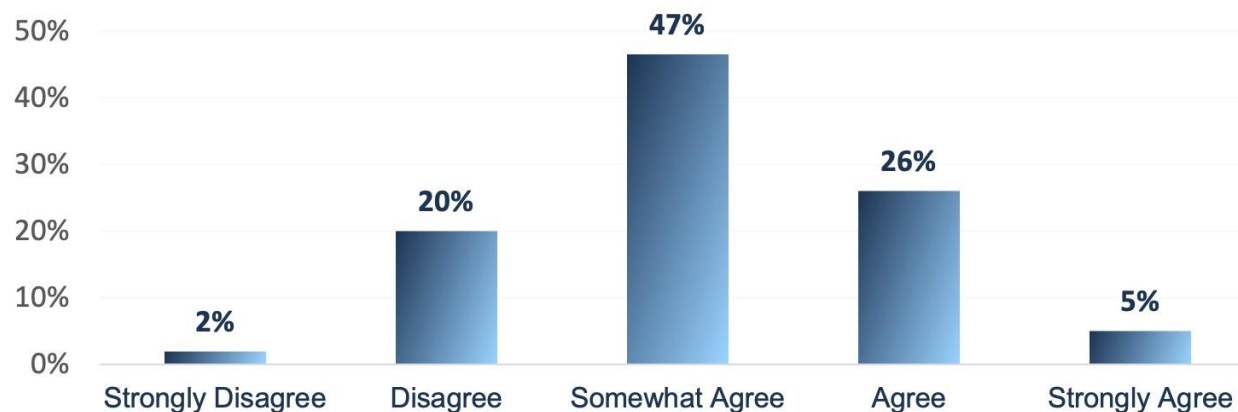
Today, **78%** of POI survey respondent companies struggle to manage modern trade.

Enabling trade management capabilities & processes are critical as spending is blurring and expanding across internal departments and industry channels. A total customer cost-to-serve view can shed light on total marketing and sales investments.

## You are satisfied with your ability to manage trade promotions.



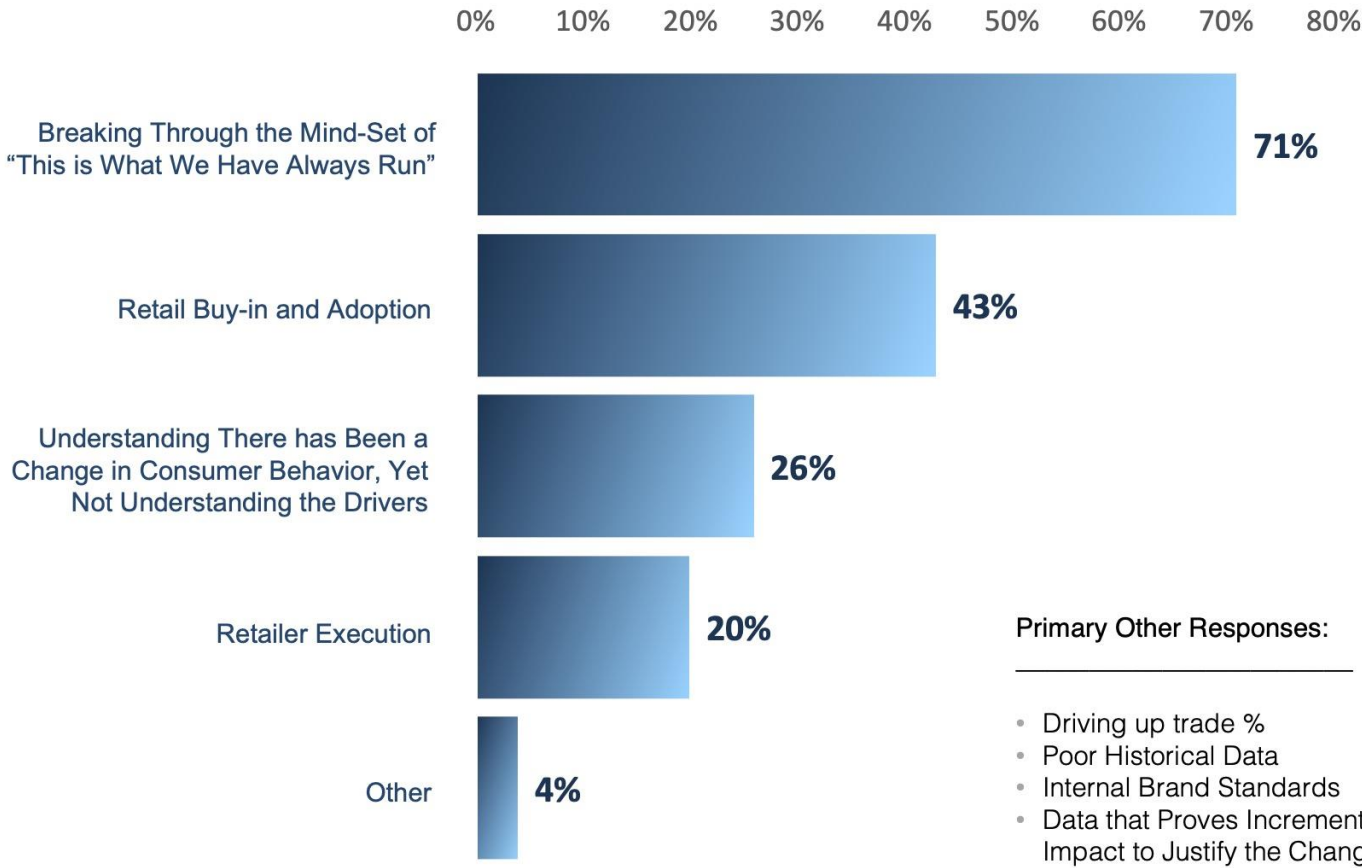
## Your company struggles with managing modern trade and incorporating digital, shopper, eCommerce, D2C, etc.



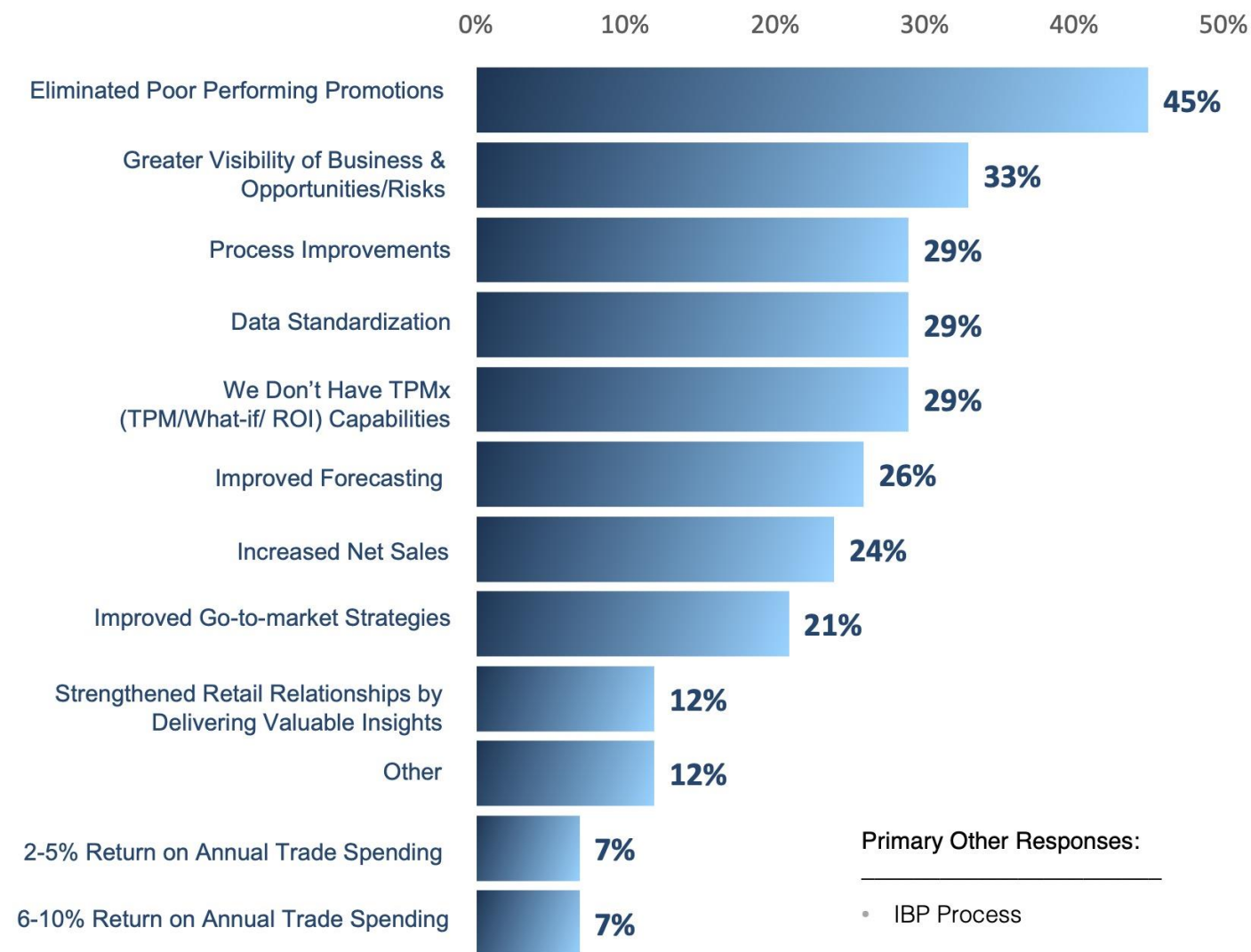


Reusing the same promotion plans year after year may feel reassuring for sales teams and retailers, but achieving **breakthrough results** requires collaboration to identify necessary changes, test new approaches, measure outcomes, and integrate successes into future strategies.

# What are the biggest challenges when trying new promotion tactics? (Select all that apply)



# What realized savings, efficiencies, & effectiveness has your organization gained from deploying TPMx? (Includes: TPM, What-if Promotion Scenarios, Post-event Evaluation (ROI))



POI research identifies the elimination of poor-performing promotions as the top realized benefit of TPMx solutions (45%). These capabilities have delivered transformative outcomes for organizations, with 33% gaining greater visibility into business opportunities and risks and 24% reporting increased net sales.

Twenty-nine percent of respondents have progressed in foundationally critical areas such as data standardization and process improvement.

Improved forecasting has been achieved by 26% of organizations, and 21% have reported advancements in go-to-market strategies. Strengthening both areas contributes to greater efficiency and effectiveness across the enterprise.

According to the survey results, 7% of respondents reported a 2-5% annual return on trade spending, while another 7% achieved a 6-10% return.

Twelve percent of organizations have strengthened retail relationships by delivering valuable insights. Notably, many companies do not simply "return" trade spending to their bottom line. Conversations with manufacturers reveal that they often optimize trade spending and reinvest it back into the business to drive further growth and opportunities.

Twenty-nine percent of companies don't have TPMx capabilities, enabling more seamless and automated planning for their users.

While it is best practice to set project KPIs to manage the delivery value of a project to an organization, many companies struggle with setting, tracking, and managing actual % improvements. Respondents may know they have delivered a return but don't know the actual percentage.

# What is holding your organization back from moving capabilities from TPMx transactional capabilities to the RGM pillars of advanced trade promotion optimization & analytics?

(Select all that apply)

## Advancing Planning, Optimization & Revenue Management

Barriers to advancing RGM are primarily organizational, including time, personnel, and budgeting challenges. To make progress, leadership teams must align on the importance of RGM and actively address resourcing concerns to avoid stagnation. RGM has consistently demonstrated significant value, often delivering a 10x return on investment within the first year. Yet, many companies hesitate to make the organizational changes necessary to unlock their full potential.

Holistic enterprise planning, powered by AI, alleviates the burdens of traditional planning processes and maximizes resources during the transition from TPMx to RGM. This approach should be a critical consideration for organizations seeking to advance their capabilities.

Intelligent enterprise planning and retail execution platforms offer data-driven recommendations for optimal plans, reducing the analytical workload and administrative burden. This shift enables planners and sales teams to focus on strategic activities, foster retailer relationships, address consumer needs, and ultimately drive sales growth.

Data cleansing, harmonizing, enriching, and staging are key enablers of the TPMx-to-RGM technology transition. Advanced analytics, artificial intelligence, and digital transformation initiatives depend on a robust data foundation, which companies must prioritize to achieve their RGM goals.



# Holistic Enterprise Planning

## People and Process Success Factors

**12%** of POI survey respondents note that they have not moved to a server-based TPMx solution ( they use Excel to manage promotions) due to a lack of standardized process, **18%** due to cost, **9%** due to integration issues, and **21%** because the project hasn't been internally prioritized. In addition, **68%** of respondents noted that when implementing their TPM/TPMx solution, their vendor and/or services team provided best practices.



**Change management** plays a pivotal role in successfully implementing new processes and platforms for organizational transformation. To ensure progress and capability enablement, project teams must leverage best practices provided by vendors and avoid rigidly adhering to outdated company processes that could hinder innovation. Overcoming the "this is how we've always done it" mindset is essential for driving meaningful change. **32%** of organizations that lack best practices guidance likely encounter significant challenges in user adoption, process optimization, and tool effectiveness. These challenges often undermine user experience and diminish the overall return on investment (ROI) of the project



**Imagine** having an optimized and automated annual operating plan that allows for quick internal evaluation, management, and adjustment as needed. This includes automating and optimizing trade allocations, pricing, promotion plans, mix, go-to-market strategies, and other aspects of the plan.

The administrative burden would be eliminated, and your team would be able to transform from tactical to strategic. By enabling these capabilities, your organization could swiftly respond to opportunities and navigate uncertainty.

If your company is looking to advance Enterprise Planning capabilities, please refer to the POI 2024 Vendor Panorama, <https://poinstitute.com>, to dive deeper into the topic and understand vendor capabilities.



**Your Guide to  
Vendor Capabilities**  
(EPx, RetX, TPM, What-if, ROI,  
RGM/TPO, Foodservice & Pricing)

**Current and relevant  
insights to help you  
on your Enterprise  
Planning journey**

# Revenue Growth Management



# Revenue Growth Management

RGM Teams Lead a Holistic Ongoing & Dynamic Enterprise Approach

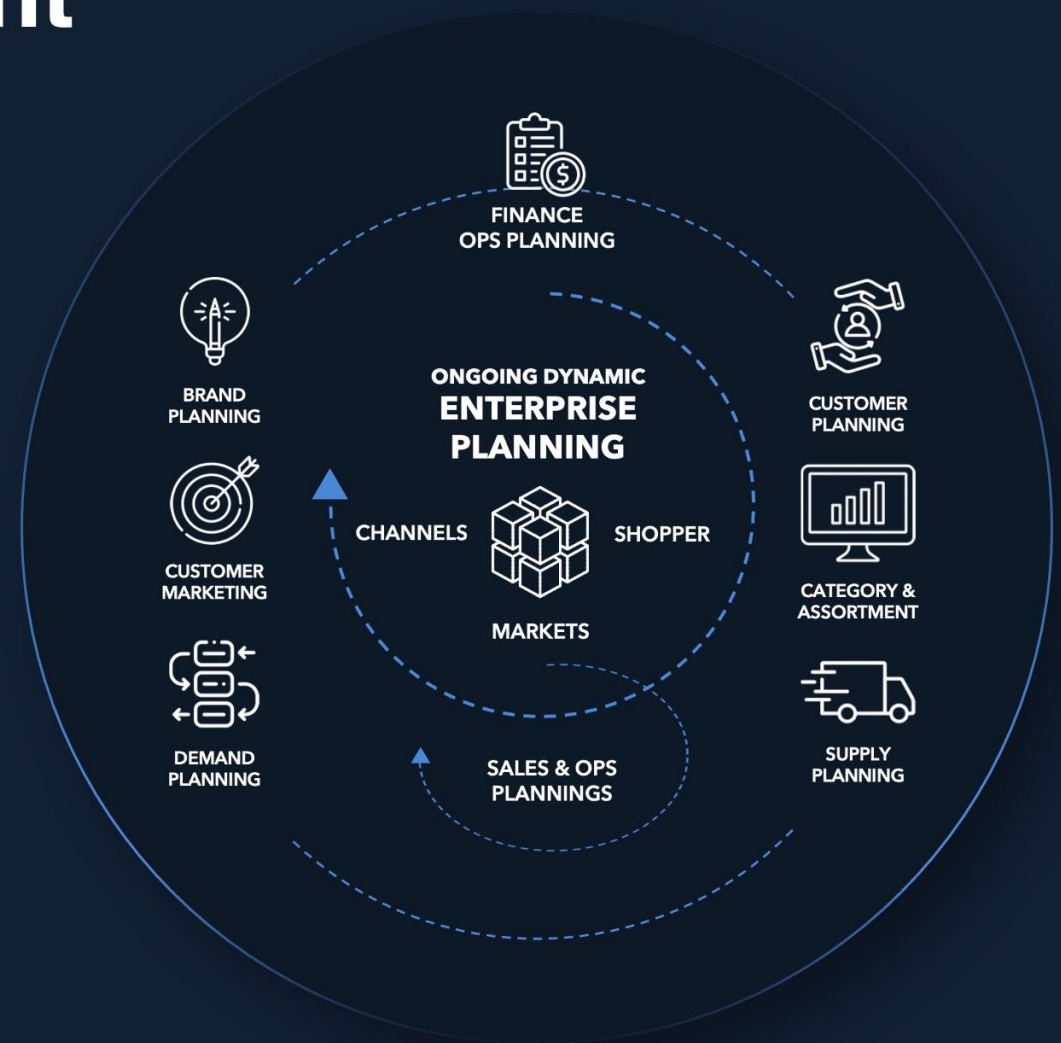
Amid economic uncertainty, companies with RGM teams gain visibility, agility, and competitive advantage by integrating cross-functional efforts, including marketing, finance, supply chain, and sales. Leveraging advanced analytics, RGM optimizes pricing, product mix, and trade investments, transforming siloed functions into cohesive strategies. Embedding this mindset across organizations, particularly in the CPG sector, ensures agility in adapting to evolving consumer behaviors and refining strategies effectively.



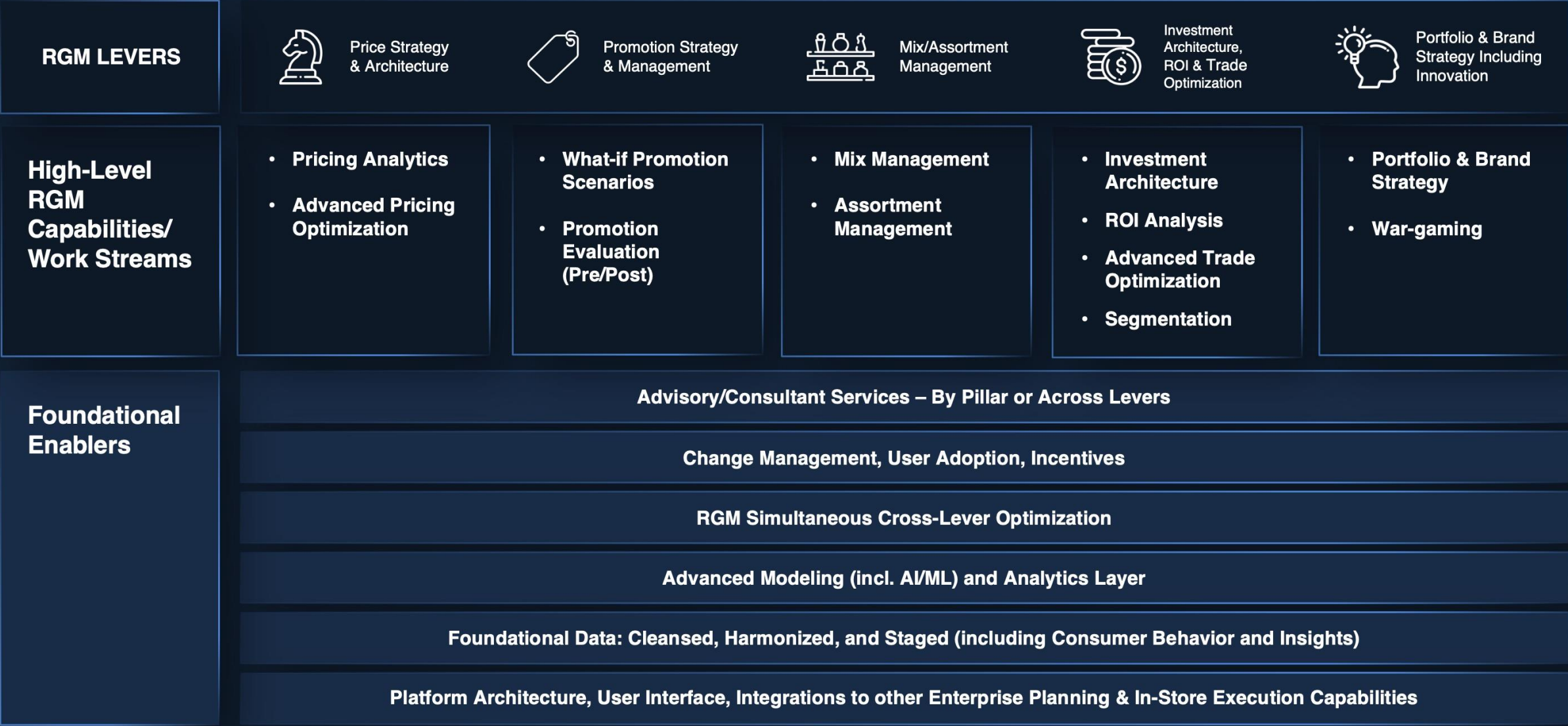
## Enterprise Planning Goal:

Have the right messaging, the right product, at the right price, with the right promotion, in the right location, and at the right time for the consumer.

An organization focused on efficient revenue growth and strategic goals relies on an adaptable Revenue Growth Management (RGM) team to quickly address consumer, retailer, and enterprise demands during crises or external challenges.

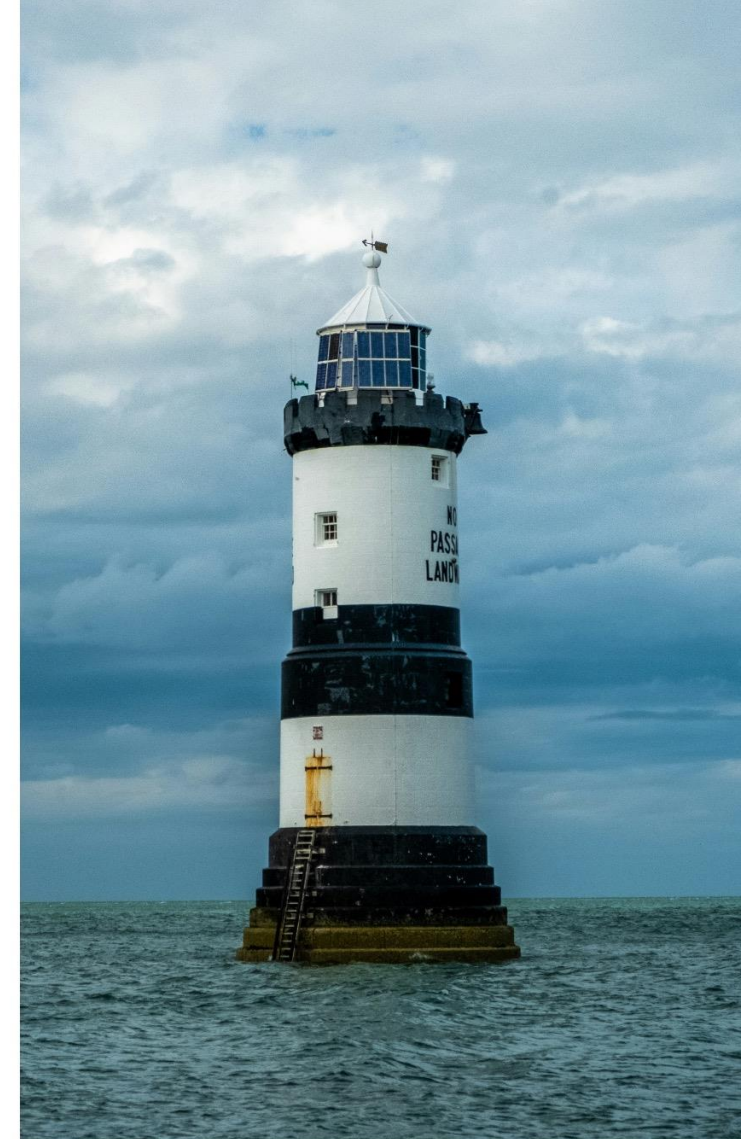
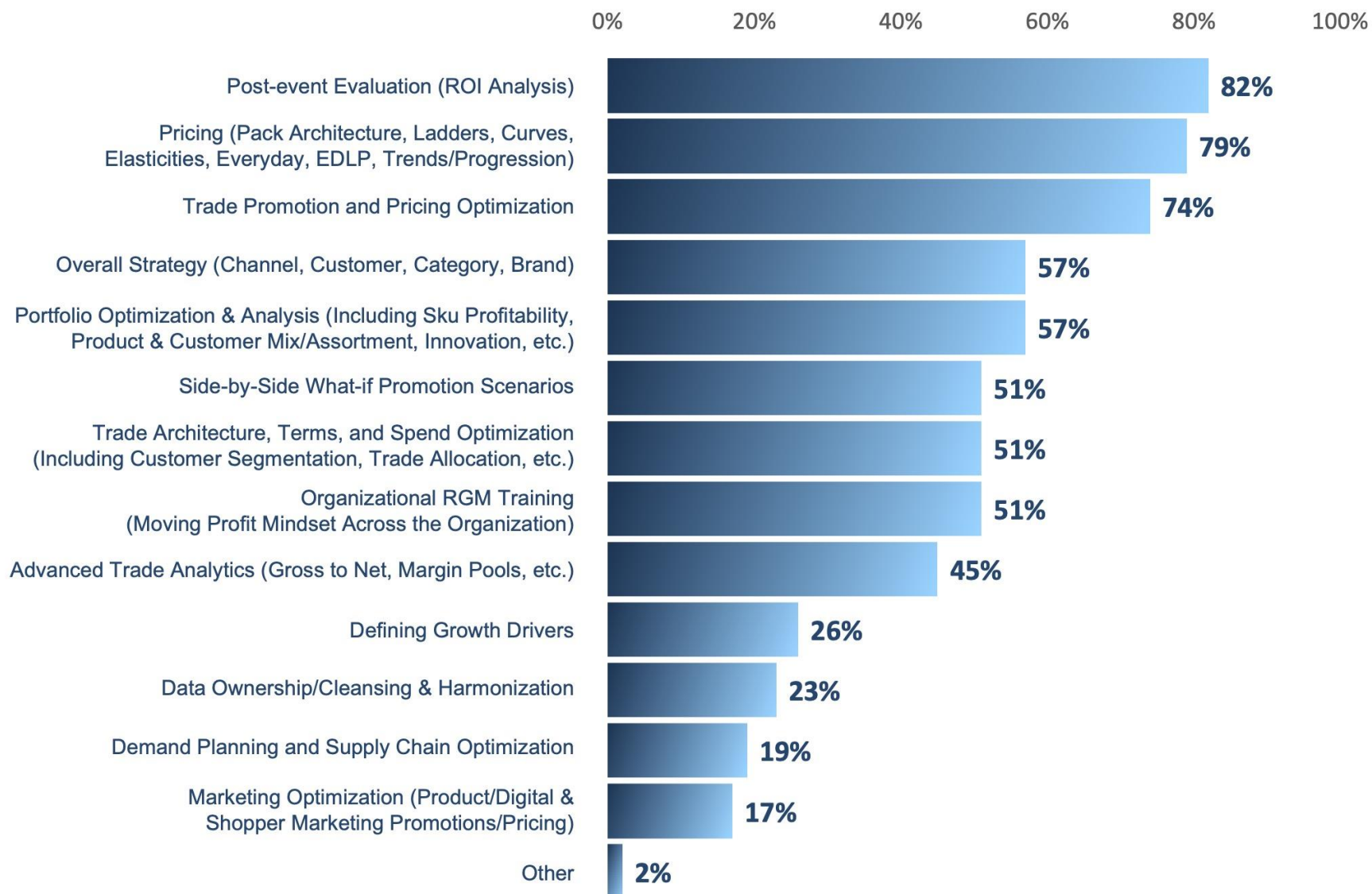


# Revenue Growth Management (RGM) Teams Lead a Holistic Ongoing & Dynamic Enterprise Approach



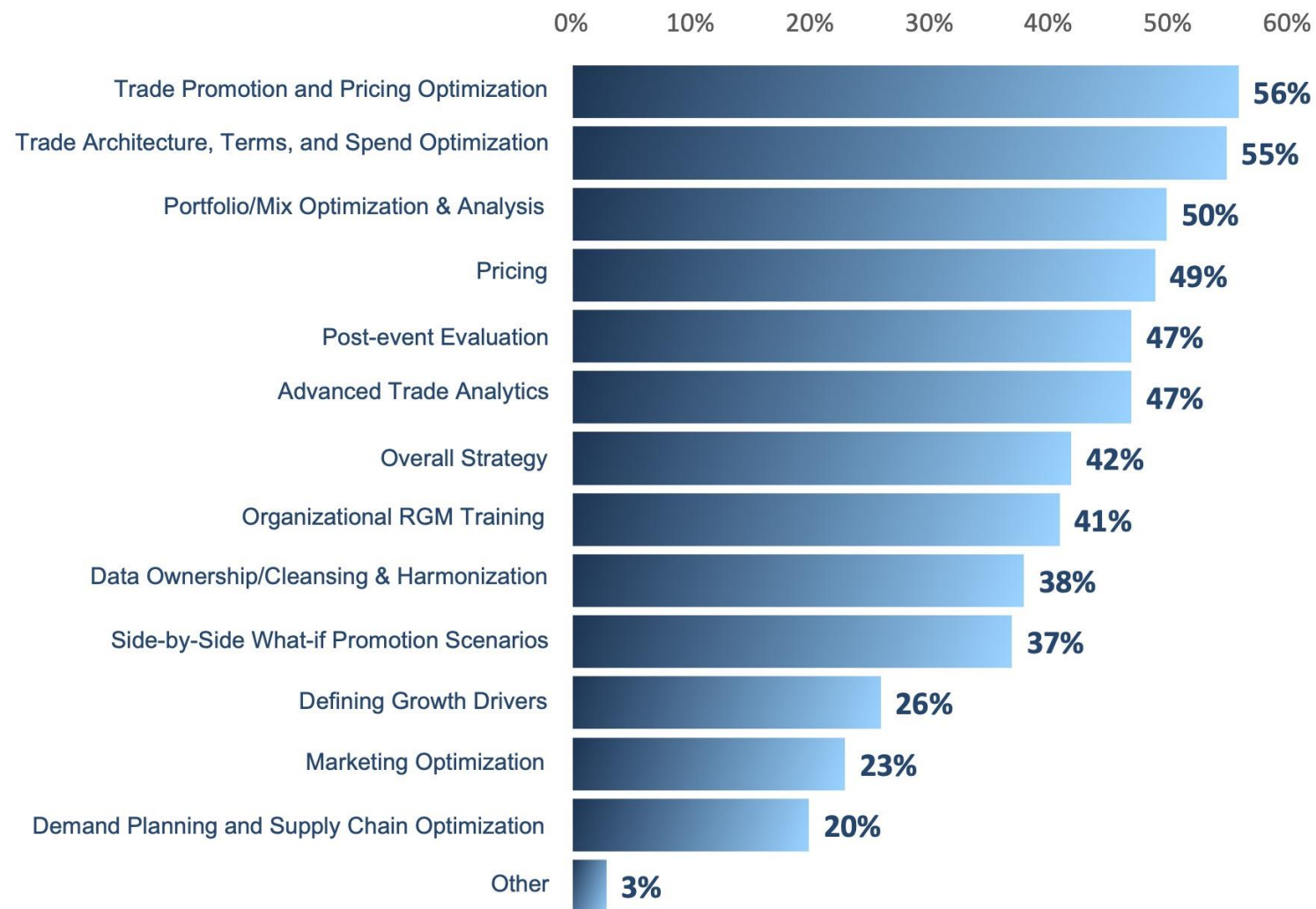


## For your organization, the RGM practice includes the following: (Select all that apply)





## To move the needle on RGM efficiency and effectiveness, our company needs to improve? (Select all that apply)



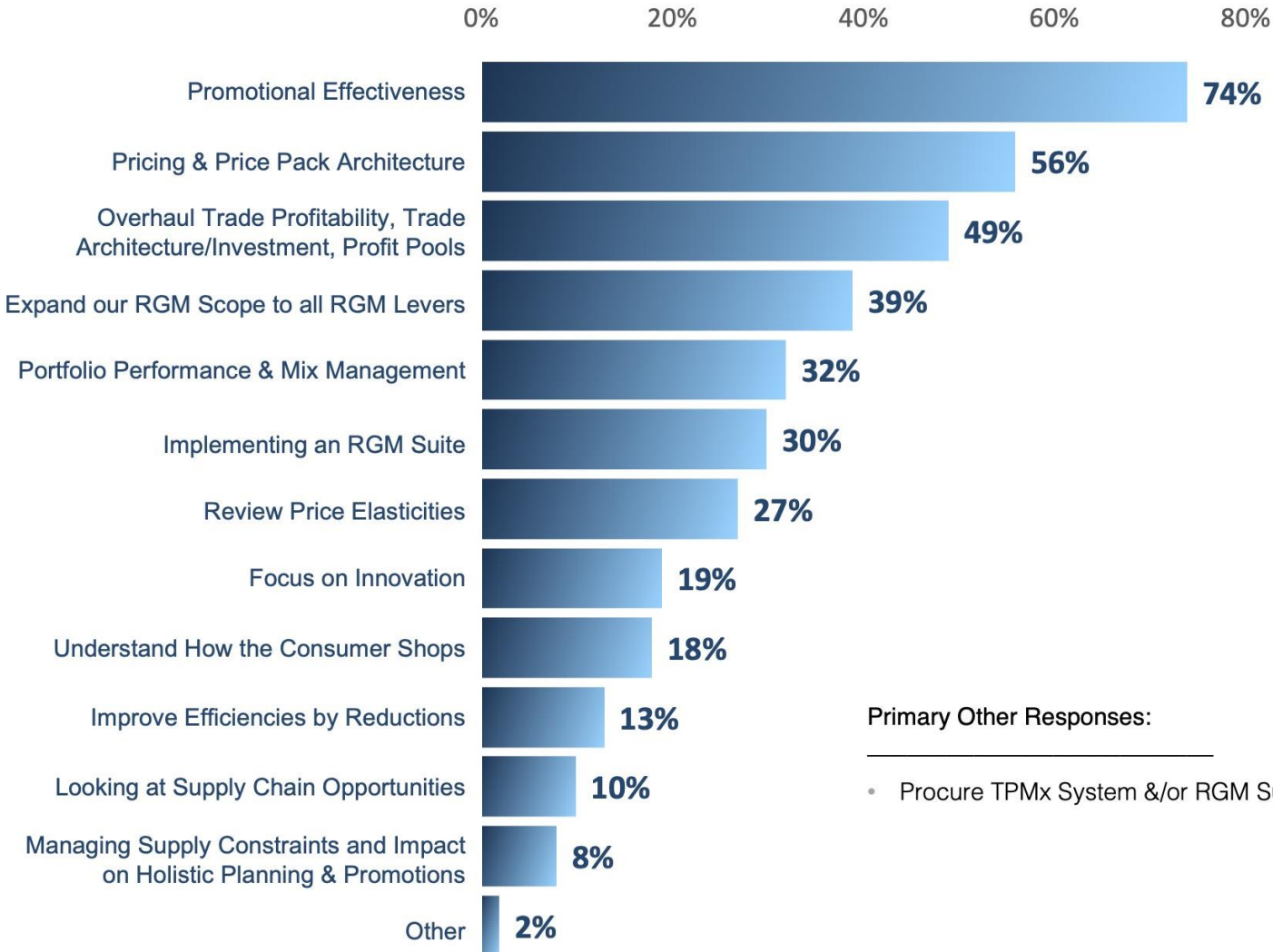


# What are the primary areas of focus for your organization's Revenue Growth Management (RGM) practice in the coming year? (Select all near-term priorities that apply)

Manufacturers have significantly focused on promotional effectiveness (74%), pricing & price pack architecture, and overhauling trade profitability & architecture.

Promotion effectiveness has become a key focus for RGM teams, alongside pricing strategies, pack architecture, and improving trade profitability. As consumers resist rising prices, maximizing trade efficiency and achieving stronger ROIs on events is essential for both CPGs and retailers. However, this requires collaboration and a willingness to move beyond traditional promotion tactics.

CPGs that clearly articulate the need for change are better positioned to overhaul inefficient promotions. Prioritizing negotiation skills, testing consumer preferences for promotion types and price points, and analyzing the competitive landscape will enable retailers and CPGs to develop stronger strategies, foster trust, and build lasting partnerships.

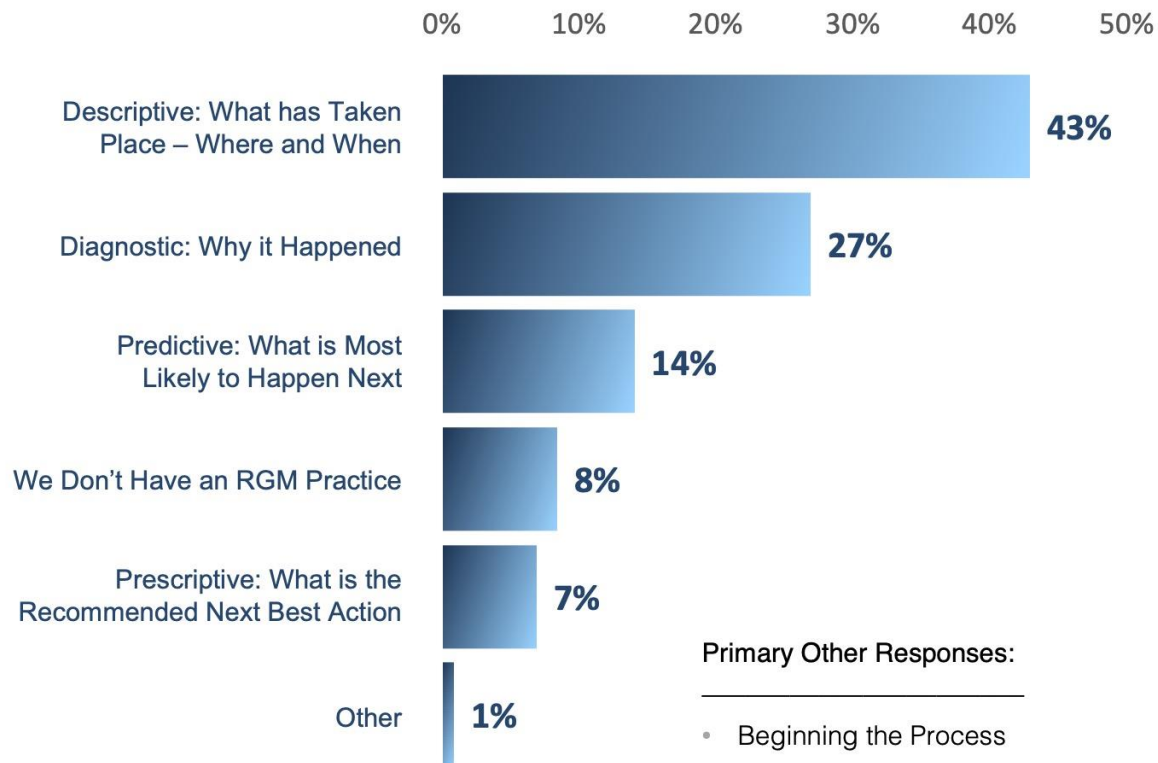


Primary Other Responses:

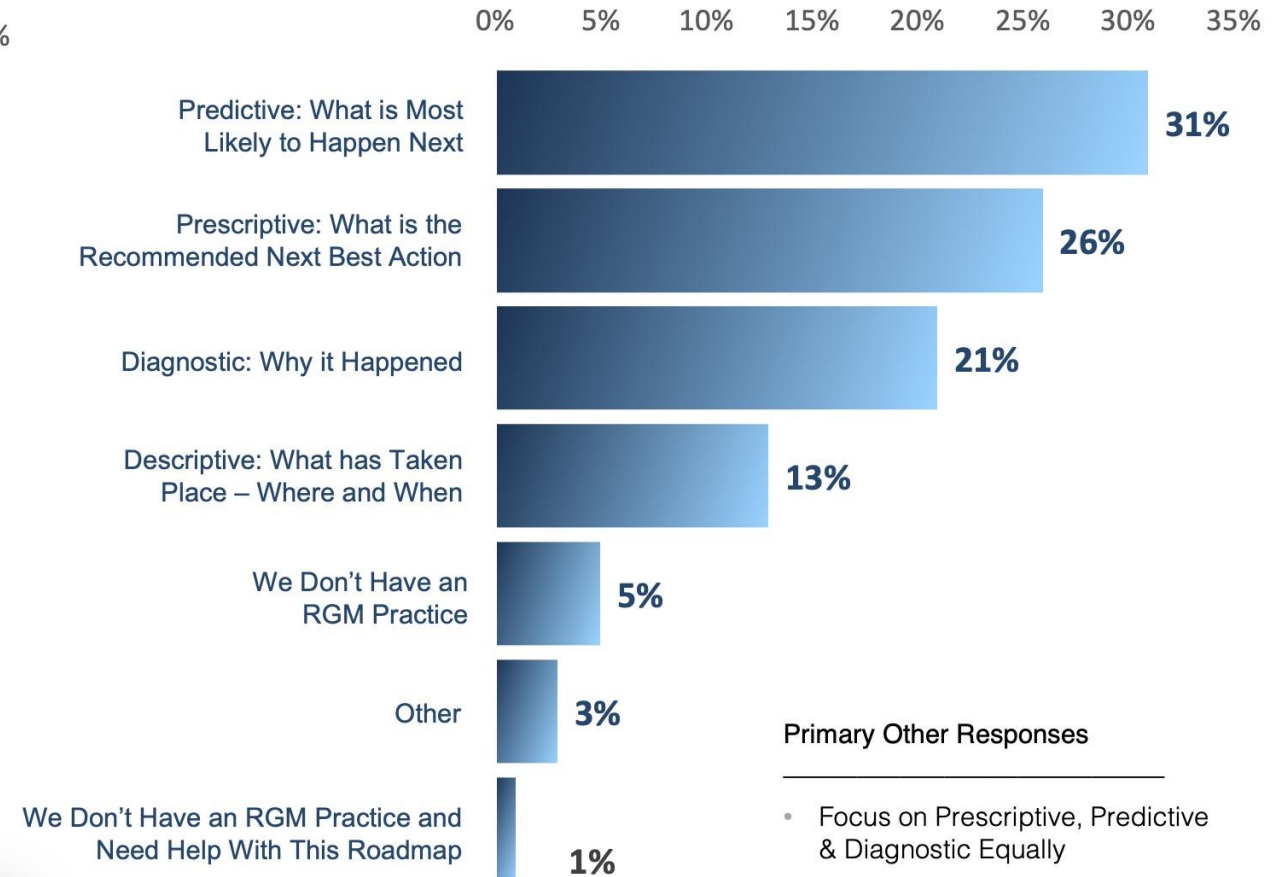
- Procure TPMx System &/or RGM Suite

# Revenue Growth Analytics Practice Maturity

## What is the maturity of your current RGM analytics practice:



## What level of RGM analytics maturity is your goal for 2024?



In 2025, CPG Manufacturers plan to transform their RGM analytics practices from highly descriptive and diagnostic to predictive and prescriptive.

# Advancing Analytics to Understand the Next Best Action

Advanced

Advanced Analytics Evolution

Base

Anticipatory Analytics with Advanced Modeling/AI  
(Non-generative AI with Human-like Reasoning)

Consumer Behavior & Market Shifts Trigger Anticipatory System  
Recommendations & Autonomous System-Driven Decision-  
Making – Always On War Gaming- Past & Future Performance)

Prescriptive Analytics

Predictive Engine Simulates and User Interprets  
Data and Prescribes Recommended Next Best  
Action-Past & Future Performance

Predictive Analytics

User Uncovers What Is Most Likely To  
Happen Next- Past Performance

Descriptive User Generated Insights

User Uncovers Trends and Casual  
Factors (Why) - Past Performance

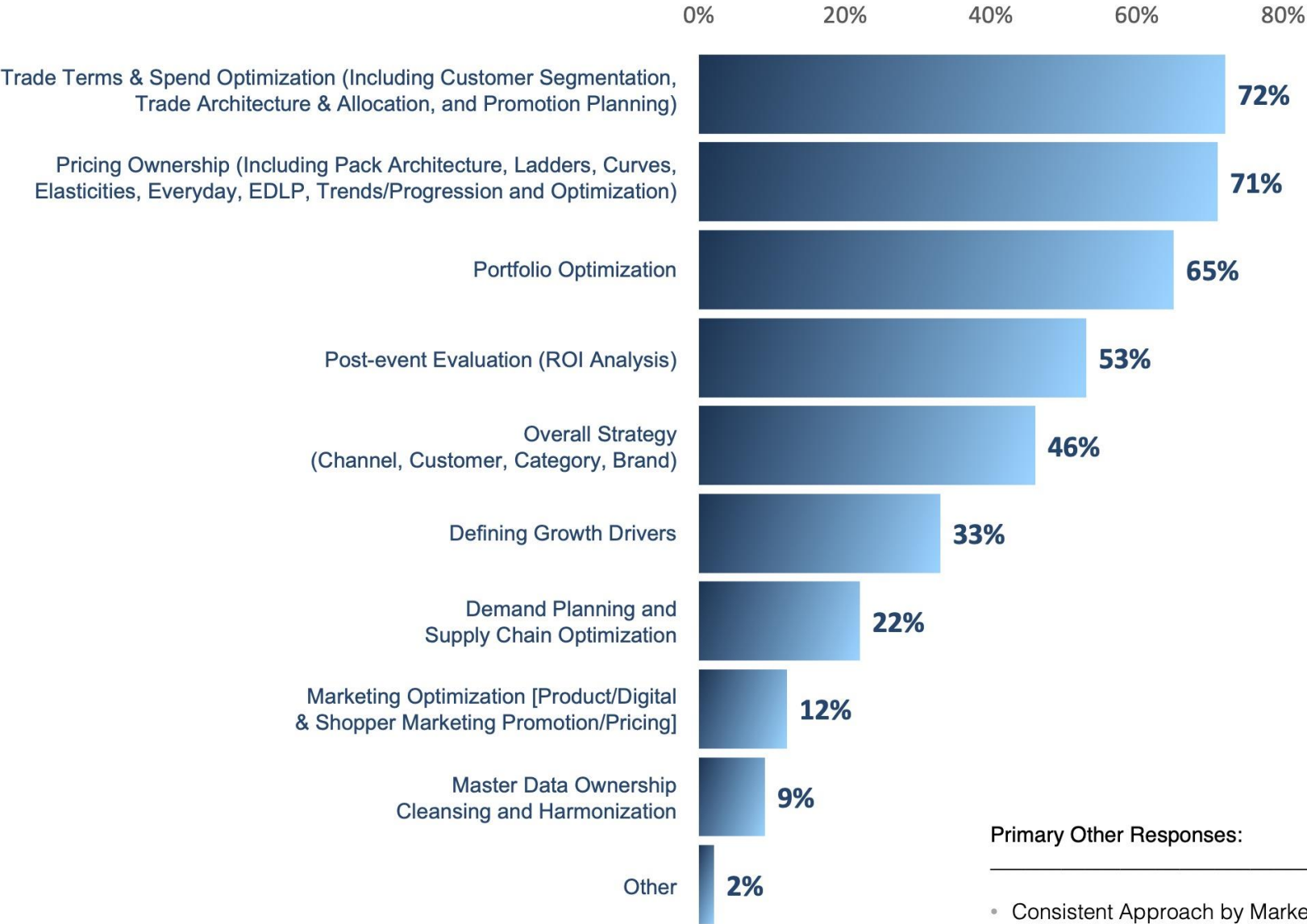
Diagnostic Business Intelligence & Reporting

User Analyzes Data to Determine What  
Has Taken Place – Past Performance

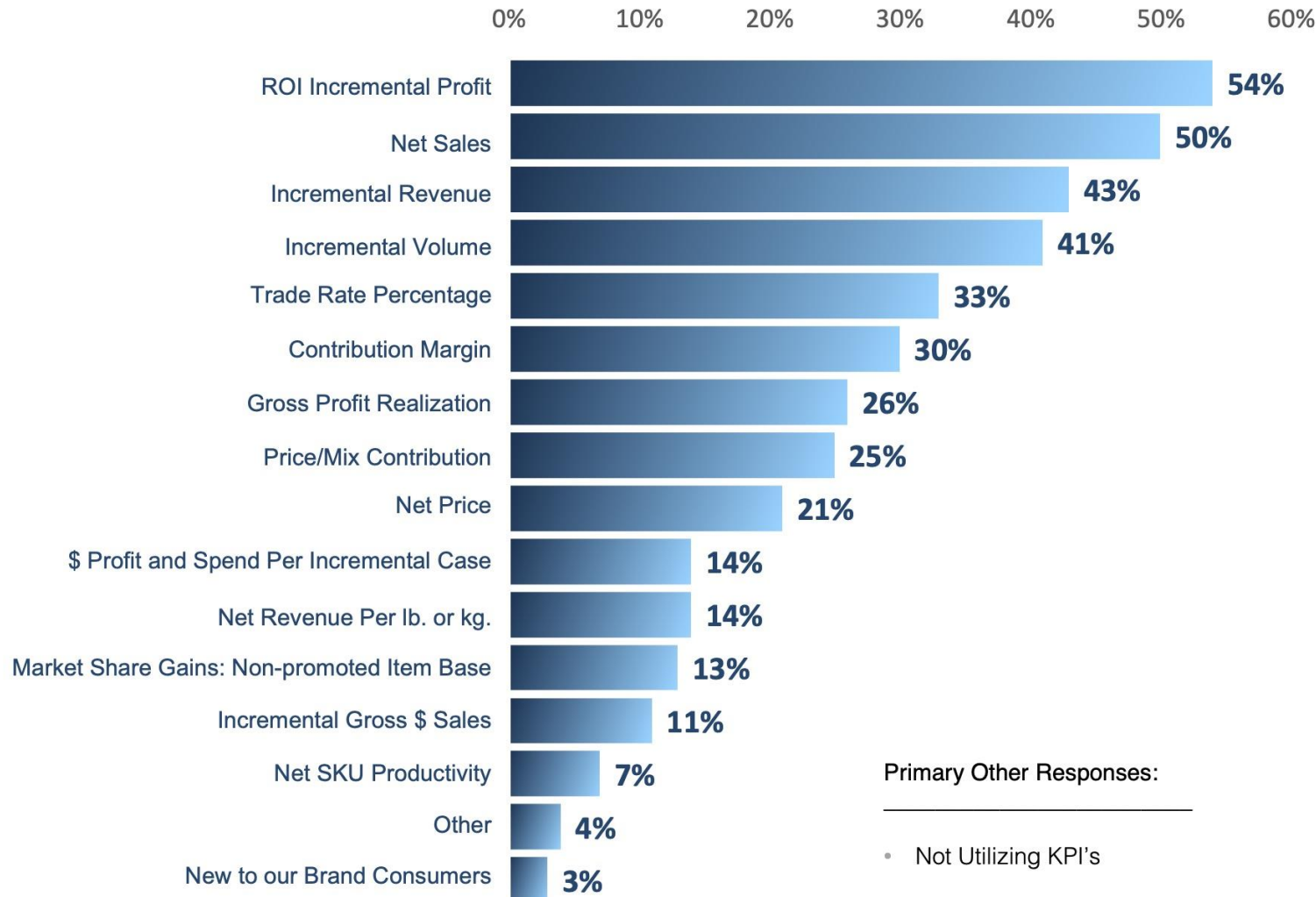
Cleansed, Harmonized & Staged Data

Foundational

# RGM Levers That Provide the Greatest P& L Impact:



## What are the top RGM Key Performance Indicators (KPIs) your team utilizes?



Whether you have an experienced RGM team or are new to the practice, using KPIs to manage the business is essential.

POI Peer benchmarking provides insights into the top KPIs other RGM leaders use to identify and drive efficient growth for their organizations.

**Gross profit, mix, and net sales KPI utilization has substantially increased year-over-year.**

It is imperative that your organization measure KPIs to gain the desired behavior, organizational change, and outcomes.

# The following teams own post-event ROI analysis and manage evaluation post-mortems:



## Primary Other Responses:

- Post-event ROI Evaluations are not Completed
- Promotion & Pricing Team

## Post-event ROI Analysis-Who's doing the work?

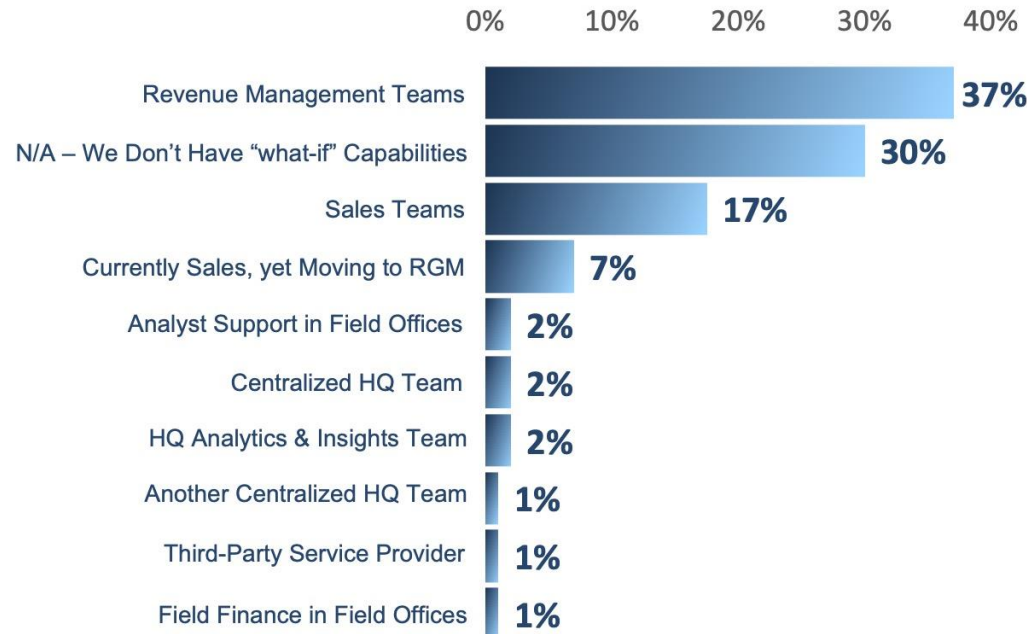
- 43%** of RGM teams are owners of post-event ROI analysis.
- 21%** of RGM teams are working with key account sales managers to evaluate event performance.
- 7%** of Sales teams don't have post-event ROI capabilities.
- 6%** of Sales teams are owners of post-event ROI analysis.

RGM teams are involved in post-ROI event analysis in **74%** of organizations, yet sales teams often are on point to lead retailer promotion plan changes. Equip sales teams with ROI analysis and negotiation skills. This will help sales teams present new strategies at retail.

# Who performs the work?

**Like post-promotion evaluation work**, RGM teams are heavily involved in creating "what-if" scenarios and optimizing trade promotion and pricing strategies. The latest TPMx platforms are designed to automate ROI analysis and what-if promotion scenarios, ultimately leading to more efficient and effective sales planning. As organizations adopt new TPMx technologies, sales, and other cross-functional partners can participate in these simple yet highly effective processes. Additionally, HQ teams can take advantage of these capabilities as they develop retailer go-to-market strategies.

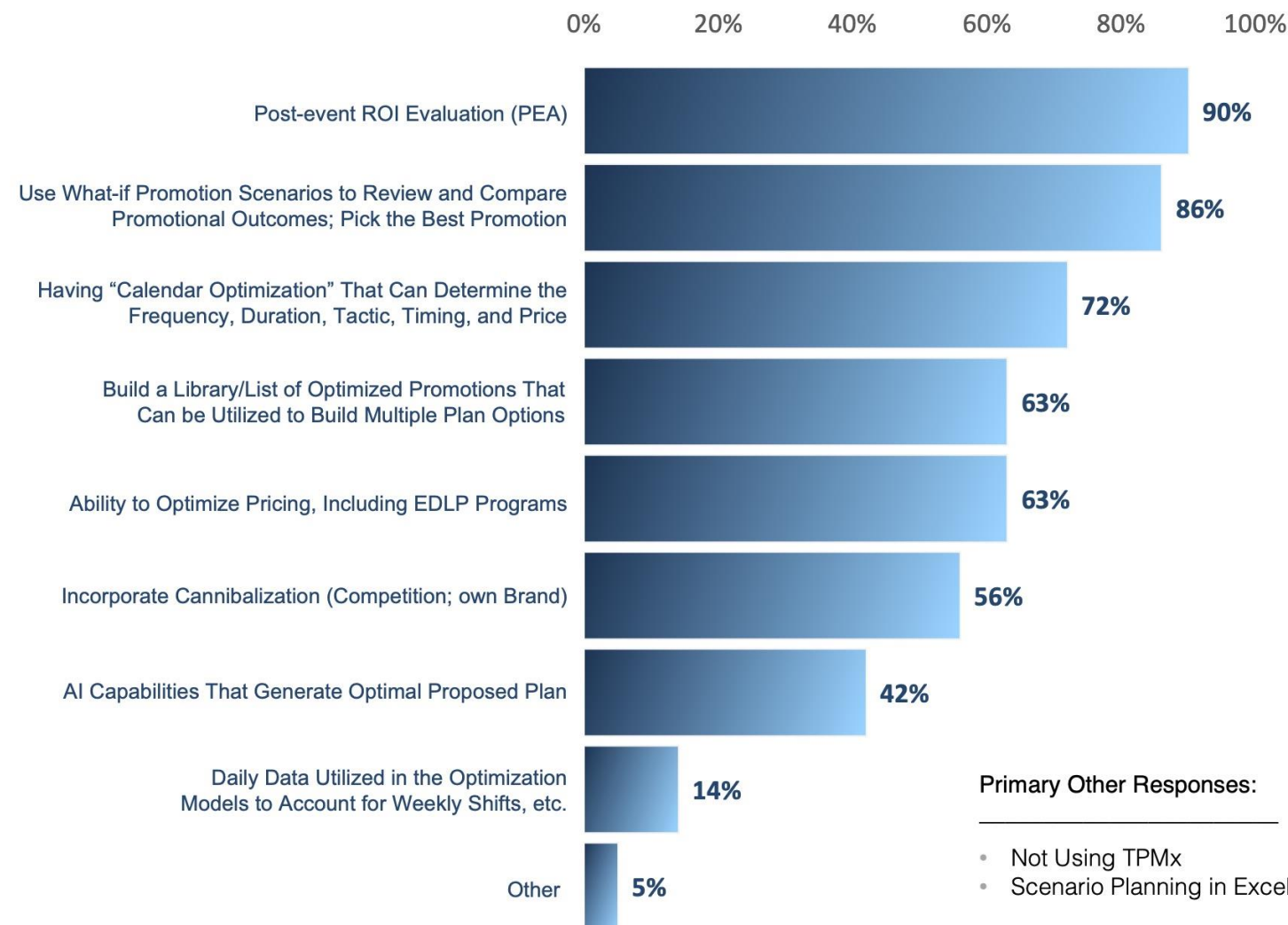
Your planning capabilities include "what-if" promotion scenario planning. Who performs this work?  
(Please pick the primary team that executes the work)



Your organization completes advanced trade promotion and pricing optimization. Who performs this work?  
(Please pick the primary team that executes the work)



# When using what-if promotion scenarios with predictive models, which of these are important to you? (Select all that apply)



In the past, many companies lacked the ability to conduct "what-if" promotion scenarios in their TPM (Trade Promotion Management) system. Additionally, their TPM platforms were often separate from other systems, making them harder to use. Most TPMx platforms today include TPM, what-if scenarios, and post-event ROI analysis, improving the user experience and adoption.

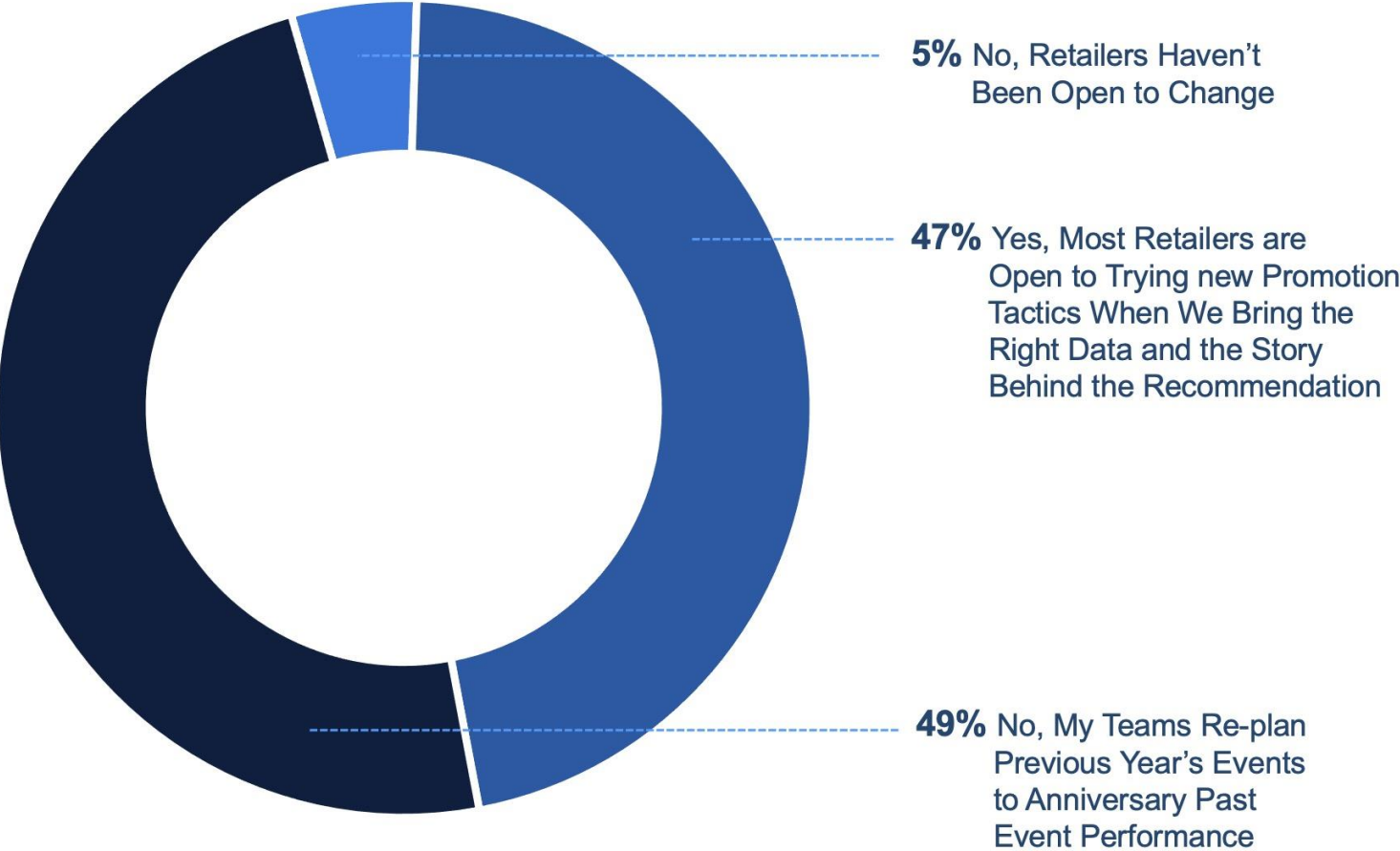
According to the POI survey, **90%** of companies want the ability to evaluate post-event ROI. **Eighty-six percent** of organizations prioritize optimizing promotions through what-if scenarios, and **72%** desire full calendar optimization to find the most effective promotions.

**Sixty-three percent** of companies want the ability to build a library of optimized promotions that can be utilized to build multiple plan options.

Pricing optimization, including EDLP programs, is important to **63%** of companies.

As organizations prioritize profitability, efficiency, and digital transformation, with consumers at the core of decision-making, the need to simulate pricing, promotions, and tactics drives the adoption of capabilities and processes that enhance holistic enterprise planning.

Has your organization been able to reinvent and sell new promotion strategies at retail? (Select the answer that best fits your organization's status)?



**Forty-nine percent** of respondents are still following the anniversary method and repeating the previous year's plans even though the price and promo landscape has drastically changed.

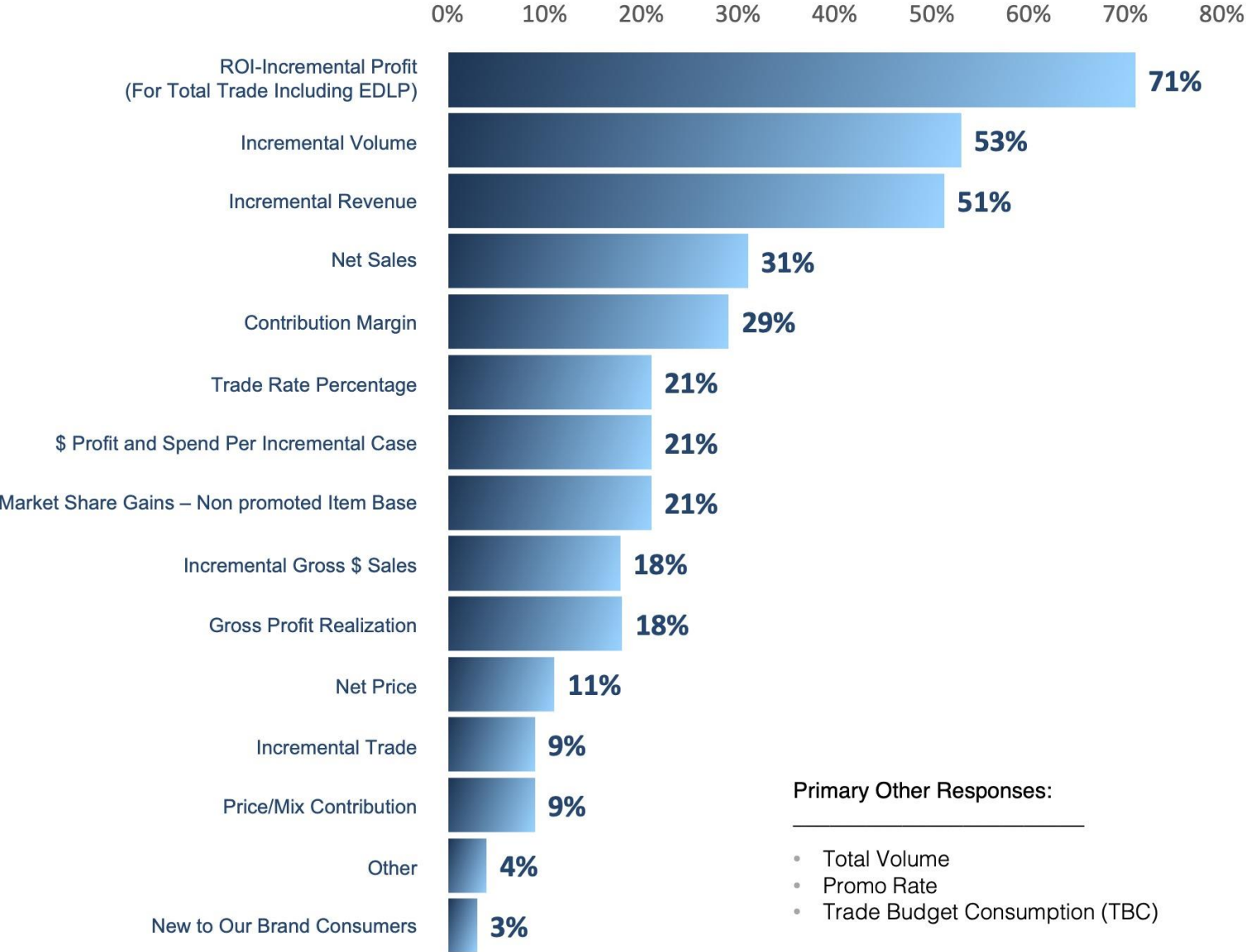
**Forty-seven percent** note that retailers are open to trying new promotion tactics when the right data and story are presented, which is encouraging as CPGs move toward a greater focus on Promo ROI and efficient spending.

Sales teams are often hesitant to embrace new approaches, even with tools that provide testing and consumer response data to demonstrate the impact of promotional changes and reduce perceived risk. Comprehensive training is essential to overcome this resistance.

Equipping sales teams with negotiation skills and a solid understanding of RGM, ROI, financial metrics, and strategies for driving profitable growth empowers them to advocate for change confidently.

This foundation makes securing small wins more attainable, building momentum for broader adoption and improved performance.

# What are the most important KPIs your company uses to measure promotion success? (Select all that apply)



CPG manufacturers typically run thousands of promotions every year. Most companies complete a Return on Investment (ROI) analysis after an event to evaluate the performance of these promotions and capture trade efficiency insights.

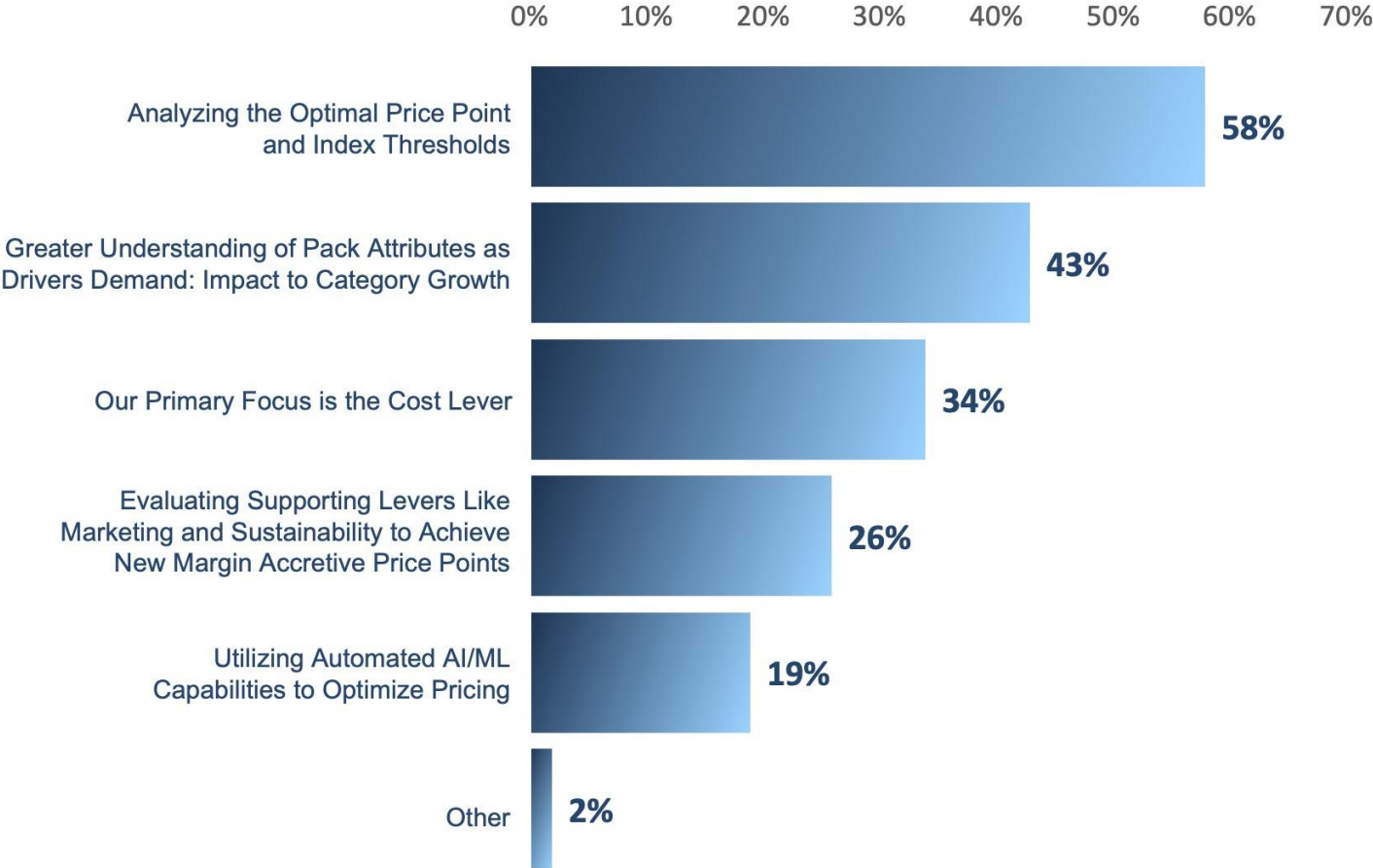
Unsurprisingly, the essential key performance indicators RGM teams utilize are similar to those used to measure promotion success. This is because promotion trade spending is a significant expense for manufacturers and the second greatest expenditure on the Profit and Loss (P&L) for the organization.

Many companies aspire to understand their holistic spending by tracking KPIs such as market share gains, new-to-brand customers, household penetration, and digital marketing ROAS. Yet, these remain aspirational goals for many organizations.

67% of POI respondents found creating promotional plans, from budgeting to execution and settlement, highly burdensome.

Commercial teams greatly value their RGM partners' support in alleviating planning challenges.

# How is your company evolving its pricing practices? (Select all that apply)



In 2025, CPG companies will continue to prioritize the analysis of optimal price points and index thresholds, as well as pack attributes, to drive demand. The focus on cost will continue to be essential.

Marketing, sustainability, and a deep understanding of product attribute demand are being evaluated to achieve new margin accretive price points and product offerings.

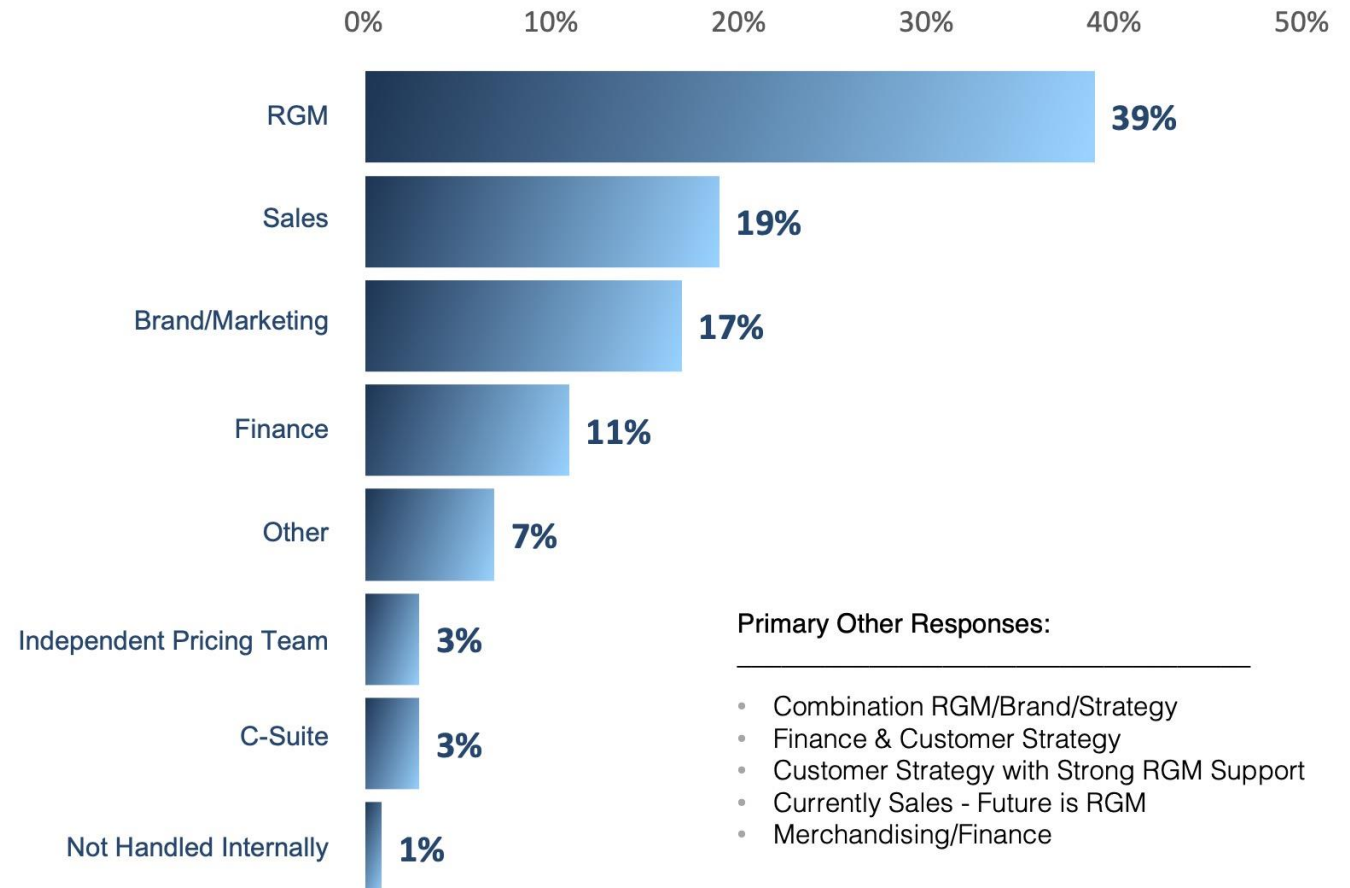
There is an opportunity to automate RGM analysis with artificial intelligence to achieve greater efficiency and growth. This will help scale essential RGM pricing, promotion, and mix analysis and gain faster insights.



## What department in your organization is responsible for making strategic pricing decisions? (Select the best choice)

The CPG industry has faced unprecedented pricing challenges over the past four years.

Traditionally led by marketing teams and consultants, the emergence of deeper pricing analytics and automated capabilities has resulted in RGM teams being much more involved in strategic pricing. Ensuring collaboration between RGM, Sales, and Marketing is key to a strong pricing strategy.



## Who owns price pack architecture (PPA) in your organization?

Marketing-HQ Brand  
Teams (To Understand the  
Supply Chain Implication  
on Product Cost)

44%

Revenue Growth  
Management (RGM)

44%

Other:

- Sales Insights  
& Customer Strategy
- Cross Functional Team

12%

Price Pack Architecture (PPA) is a strategic methodology that enables companies to offer consumers a diverse range of products tailored to their needs and preferences across various price points.

By gaining insights into consumer preferences and willingness to pay, companies can better align their product offerings with market demand.

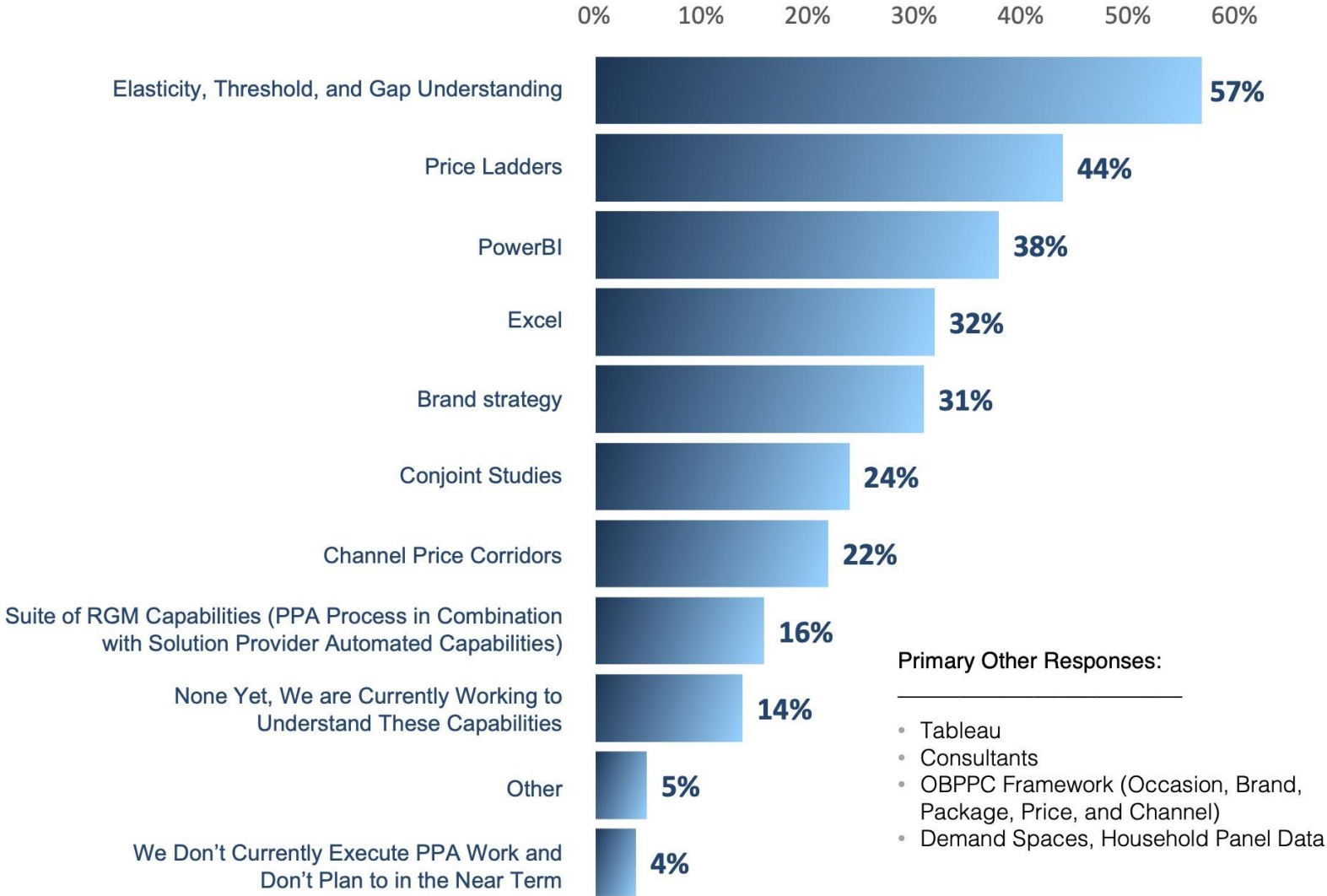
PPA emphasizes optimizing product portfolios by evaluating price points, packaging sizes & configurations, and consumer desires.

This data-driven approach supports portfolio optimization, driving innovation (Key pillars of RGM), and ultimately maximizing profit margins and ROI.

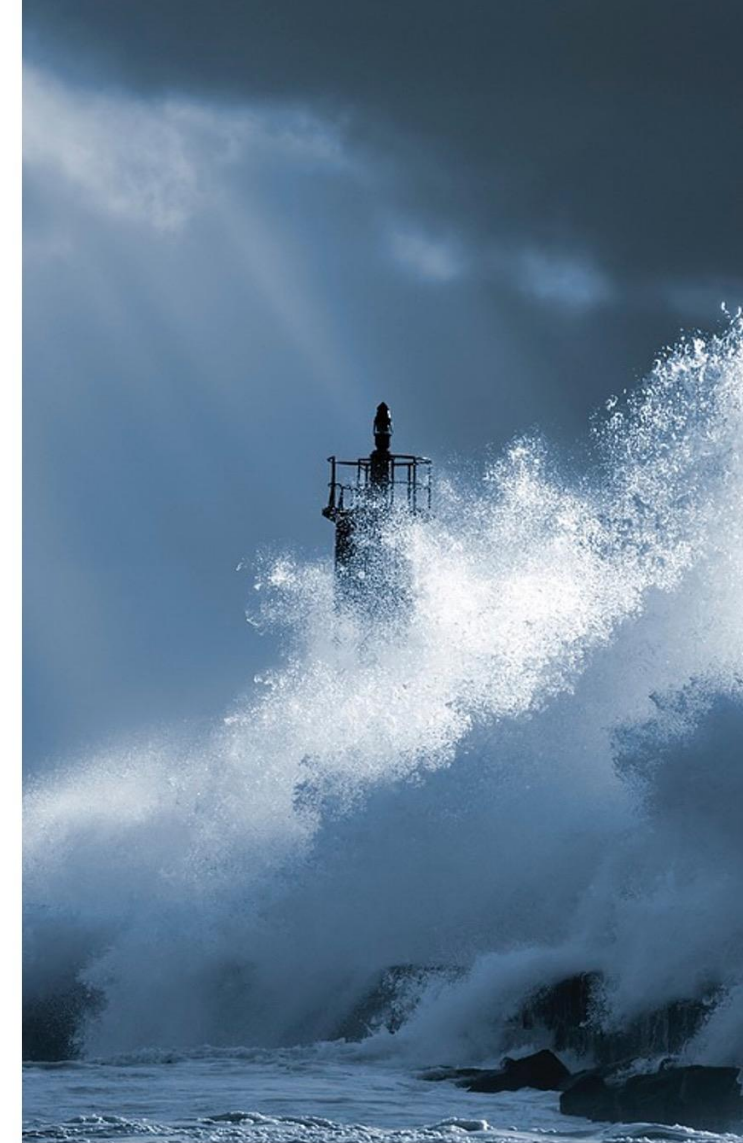
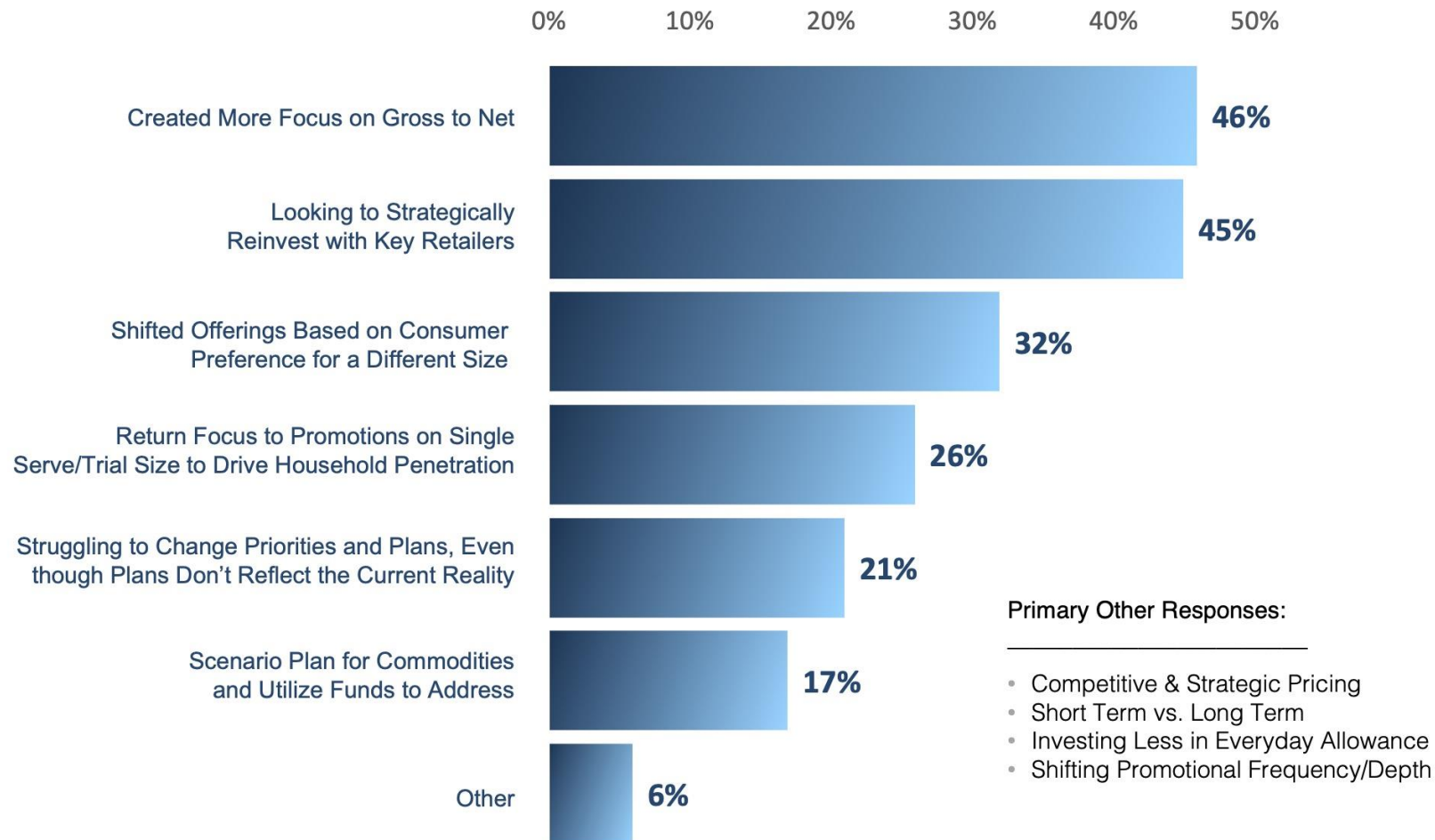
For CPG companies, PPA is particularly crucial, as it plays a key role in driving profitability and fostering growth—two top priorities for manufacturers and retailers alike.



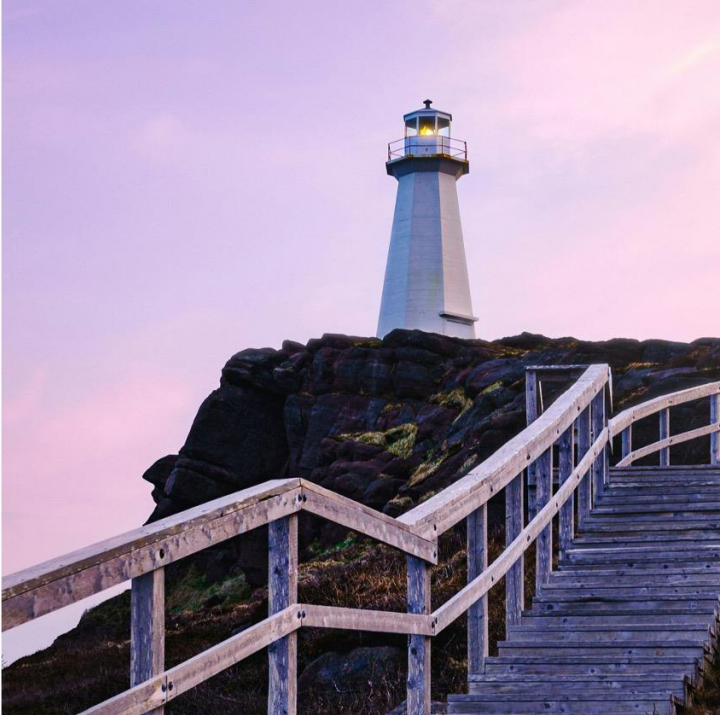
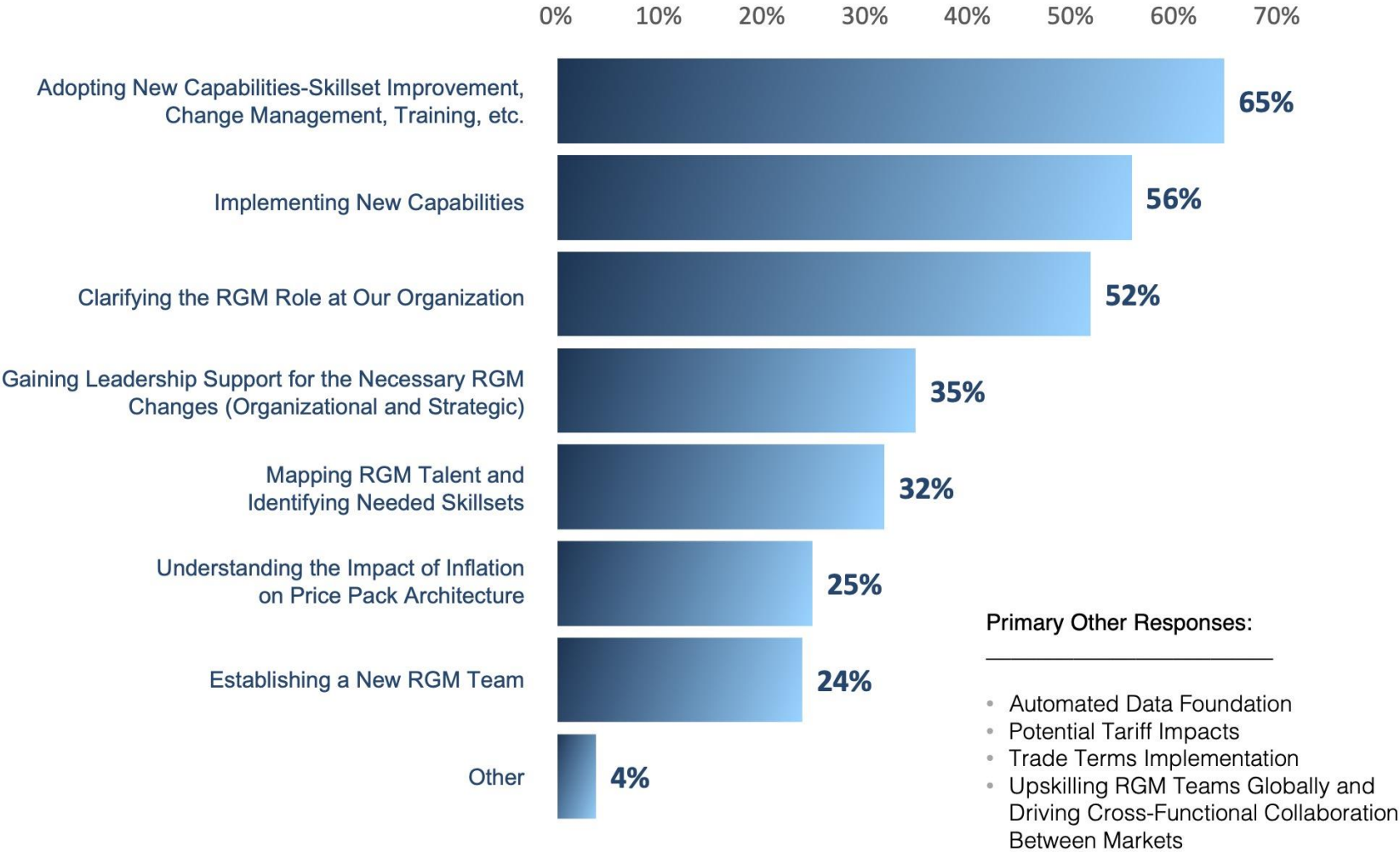
# What types of analyses/tools have you found most useful in supporting Price Pack Architecture (PPA) work at your organization? (Select all that apply)



# How have external factors from elevated pricing, decreased consumer buying power, political factors, and consumer buying/shopping behavior forced you to change your department priorities? (Select all that apply)



# What do you perceive to be the short-term (next 12 months) challenges for RGM teams? (Select all that apply)

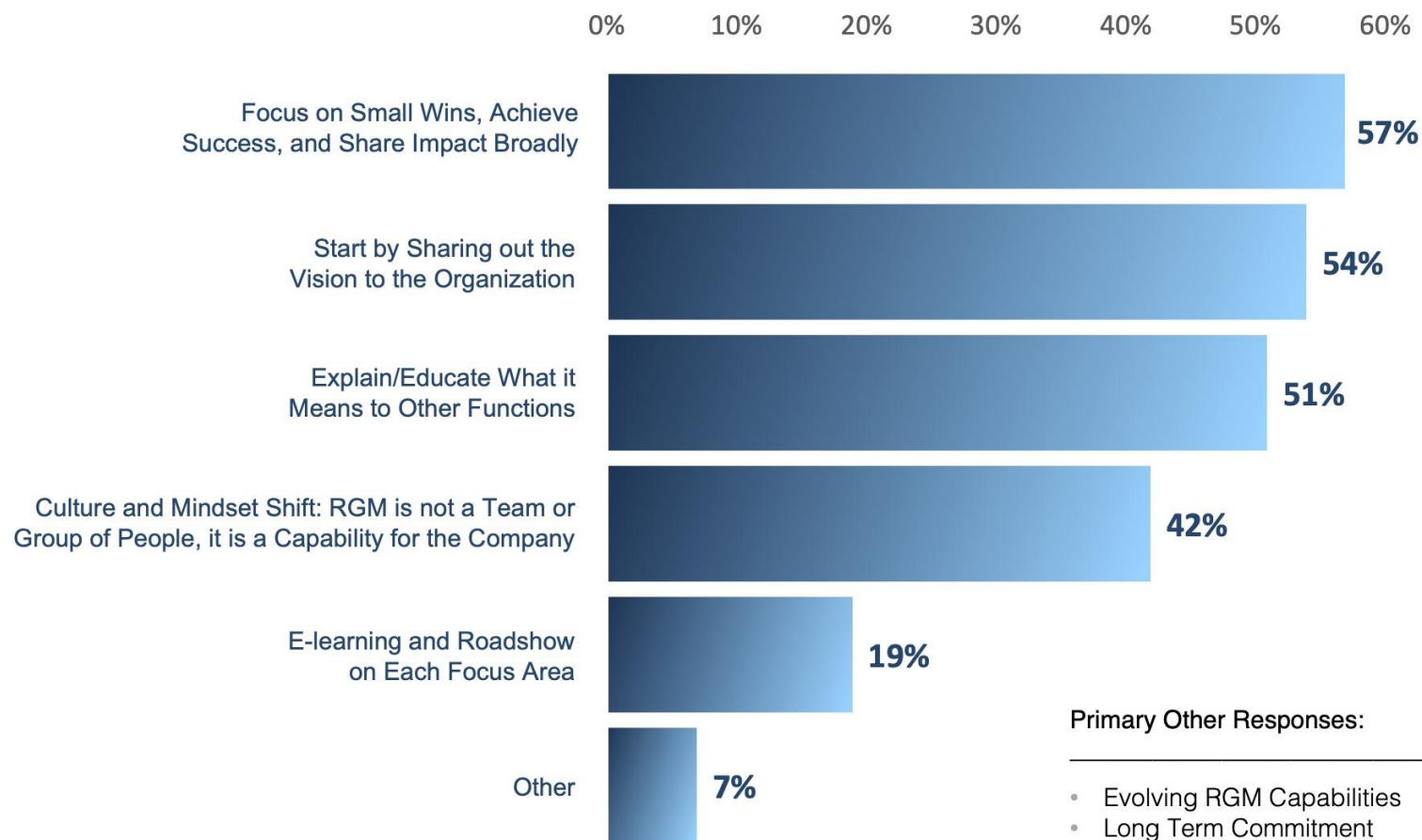


Peer benchmarking, sharing, and discussion can be a strong enabler when leading your company’s RGM journey and navigating pain points. POI leads an RGM share group in combination with our Summits to create a supportive atmosphere for learning.

Contact Joanie Malin ([jmalin@p-o-i.org](mailto:jmalin@p-o-i.org)) to learn more about POI’s RGM Share Group. During each session, manufacturers discuss their near-term projects and challenges while receiving peer feedback, advice, and best practices.



# How does your organization overcome RGM challenges and Cross-functional partner buy-in? (Select all that apply)



Teams are overcoming RGM challenges by sharing the vision organizationally and by function, focusing on small wins, achieving success, and sharing impact broadly.

# Your RGM Practice Reports Into:



**49% of RGM teams report into the Commercial Sales Organization.**

Most organizations recognize the importance of collaboration between sales and RGM to drive change, so RGM typically reports to sales.

The Finance organization is the next largest business unit at **18%**. Marketing/Brand follows at **10%**.

Note that **8%** of organizations don't have an RGM practice yet.

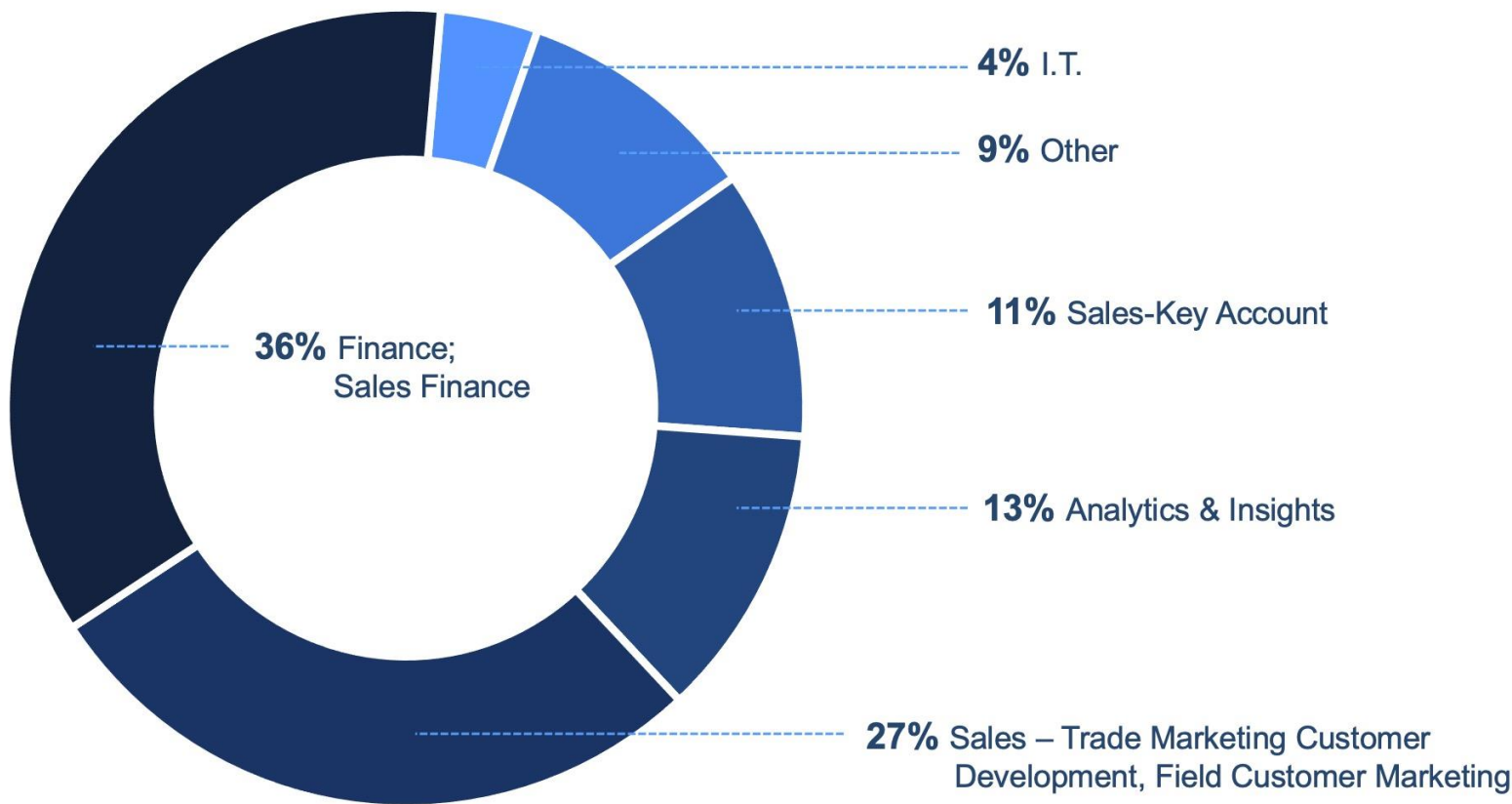


RGM is a key strategy for driving profitable growth and has gained significant traction over the past five years. RGM talent is in high demand, as the role requires a unique blend of finance, sales, and analytics expertise combined with strong leadership, influencing skills, and cross-functional understanding.

When building an RGM team, prioritize finding a seasoned leader with a proven track record of organizational development and cross-functional influence. Once the practice is established, ensure you create a clear career path for RGM team members. Without this, some talent may hesitate to transition into RGM, perceiving it as a lateral move rather than a step forward in their career. This concern is common in newer RGM practices.

Securing top talent in these critical RGM roles is essential. Establishing career paths not only aids in recruitment and retention but also ensures the development of a strong, agile team capable of delivering exceptional results.

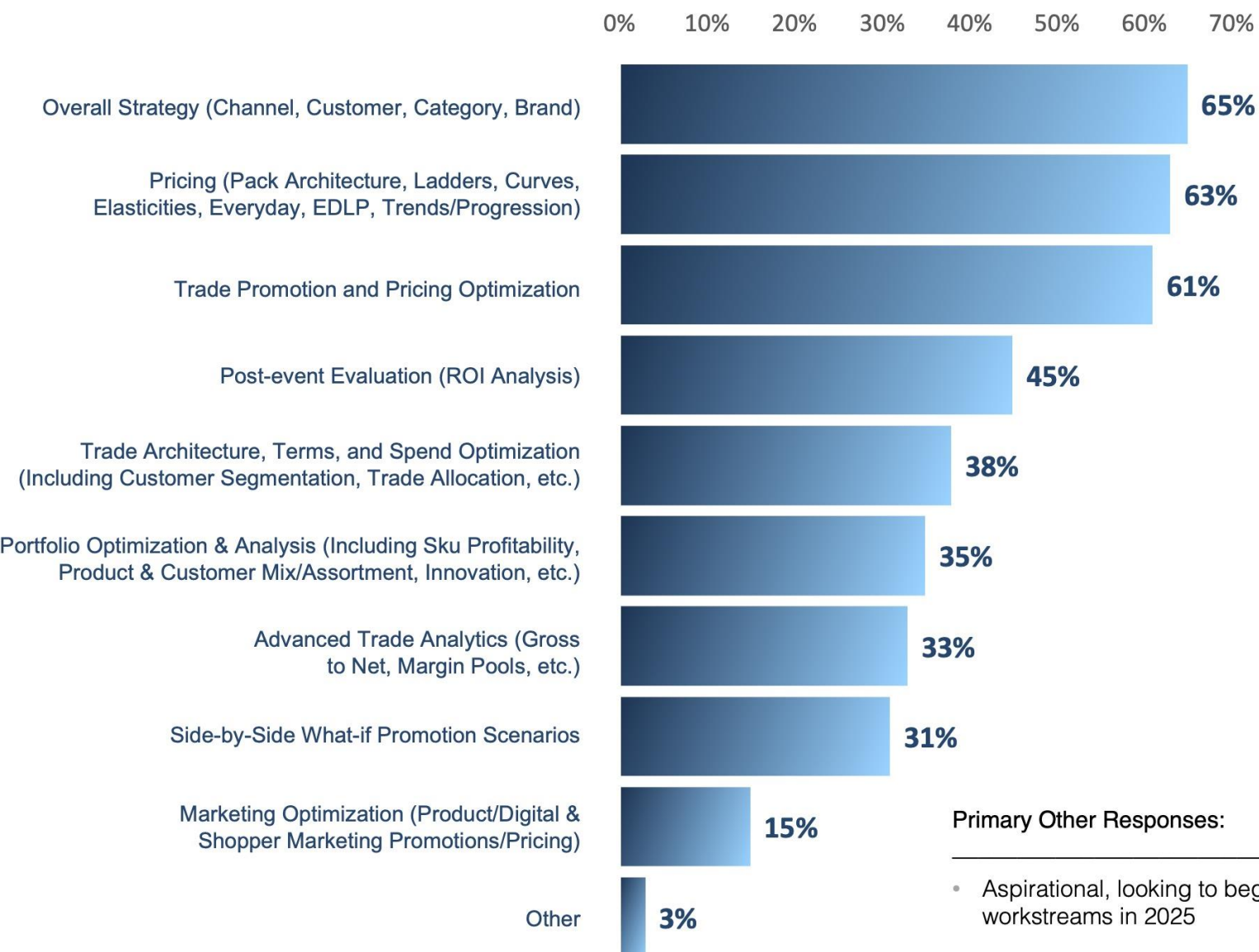
## What is the primary background of your organization's RGM Full-Time Employees?



### Primary Other Responses:

- Diverse Backgrounds Across Functions
- RGM

# Which of the following capabilities do you complete with internal teams vs. external consultant/service? (Select all that apply)



Primary Other Responses:

- Aspirational, looking to begin these workstreams in 2025



POI research reveals that many organizations complete essential work with internal teams:

**Sixty-five percent** of survey respondents noted they are completing their overall strategy with internal teams.

**Sixty-three percent** are leading the pricing workstream internally.

**Sixty-one percent** of internal teams own trade promotion and pricing optimization.

**Forty-five percent** of organizations are completing post-event evaluation ROI analysis with internal teams.

**Thirty-eight percent** note that trade architecture, terms, and spend optimization are managed internally. (Includes customer segmentation and trade allocations.)

POI observes a correlation between companies bringing RGM work in-house and the increase in available RGM suites that have entered the market in the last four years.

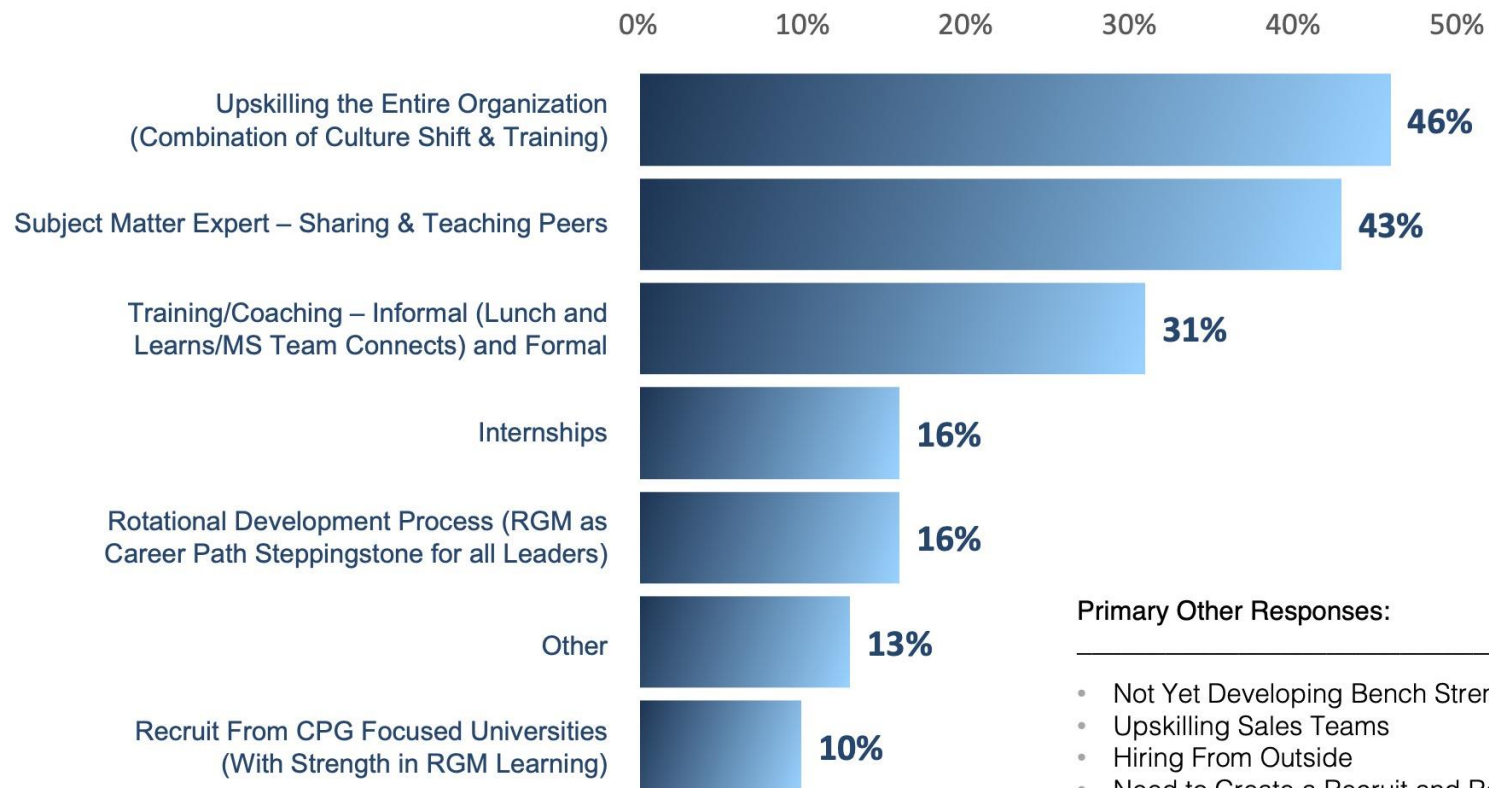


## How are you developing internal RGM bench strength for your organization? (Select all that apply)

Whether you are initiating a new RGM practice or evolving an established organization, developing an RGM mindset and internal RGM bench strength and knowledge is essential.

POI sees internships as an excellent way to attract new talent from food marketing programs that teach modern RGM approaches.

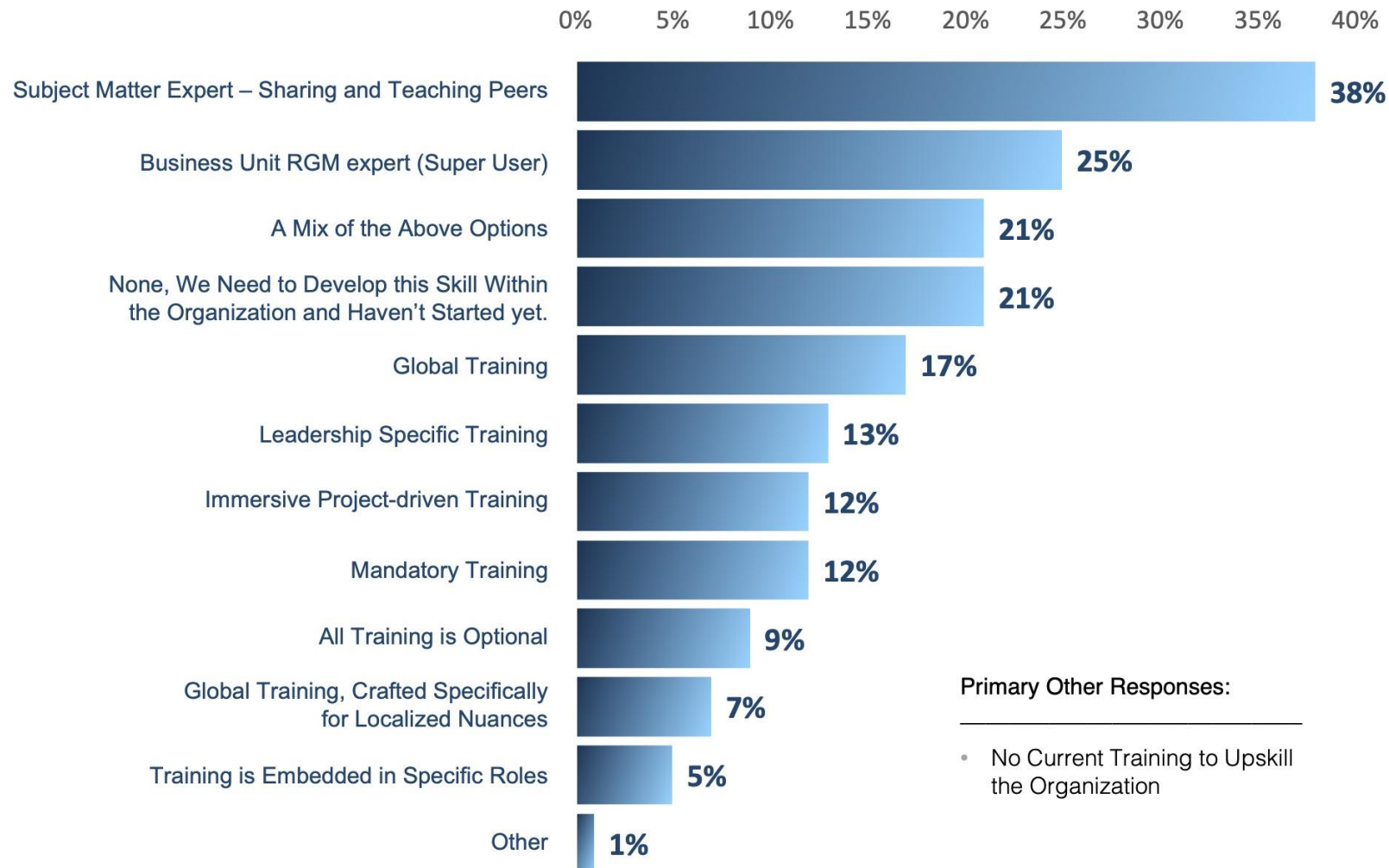
By focusing on building RGM bench strength through rotational development programs, organizations can cultivate future senior leaders equipped with a strong RGM mindset, preparing them for greater leadership roles.



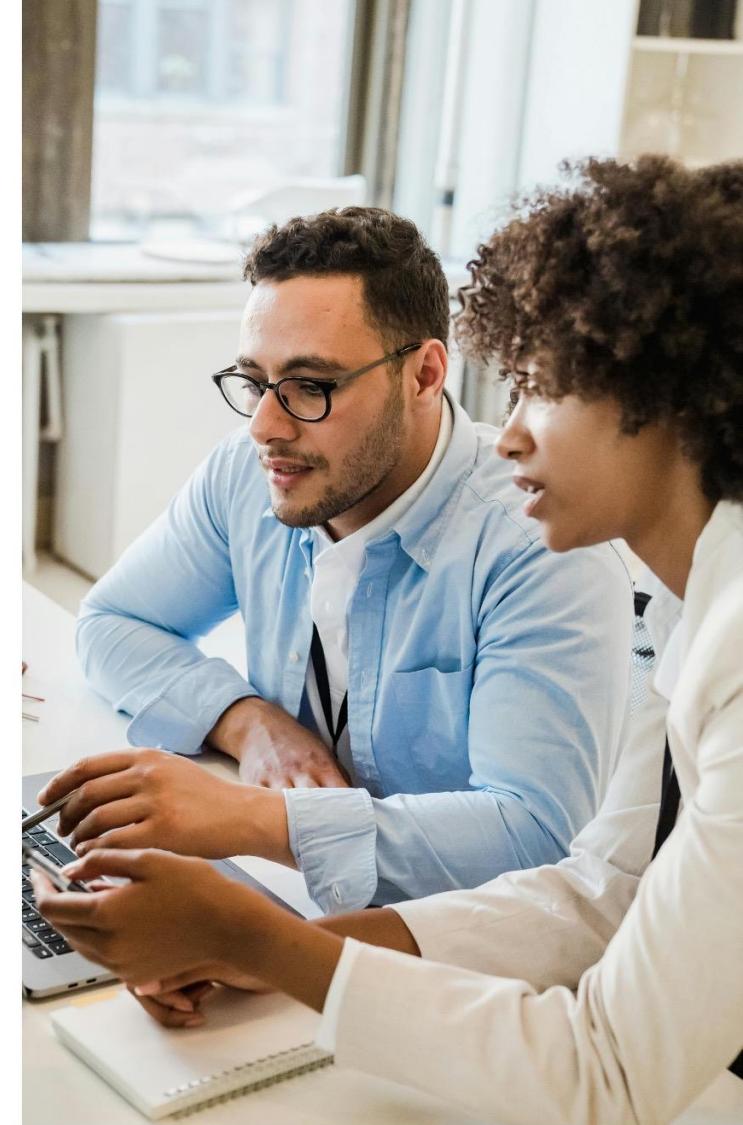
### Primary Other Responses:

- Not Yet Developing Bench Strength
- Upskilling Sales Teams
- Hiring From Outside
- Need to Create a Recruit and Retain Strategy

## What is your RGM training approach to upskill the enterprise? (Select all that apply)



Note: Global training has significantly increased year-over-year.





POI research highlights that when RGM training was implemented, the following roles were identified as key priorities:

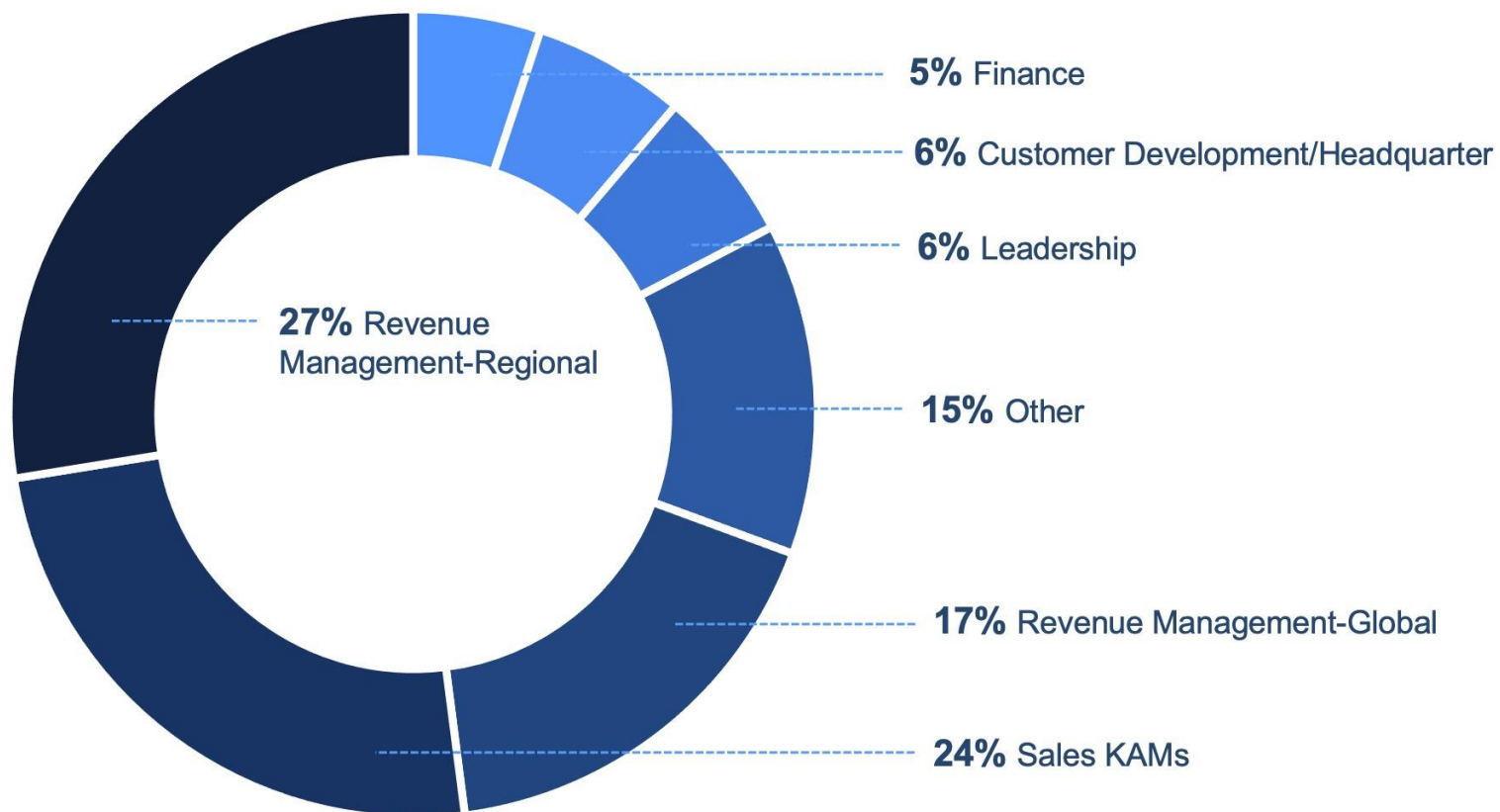
**Twenty-seven percent** of survey respondents prioritized regional revenue management teams.

**Twenty-four percent** trained Sales KAMs.

**Seventeen percent** of survey respondents prioritized global revenue management teams.

**Fifteen percent** of survey respondents stated “other.” These teams haven’t launched RGM training yet.

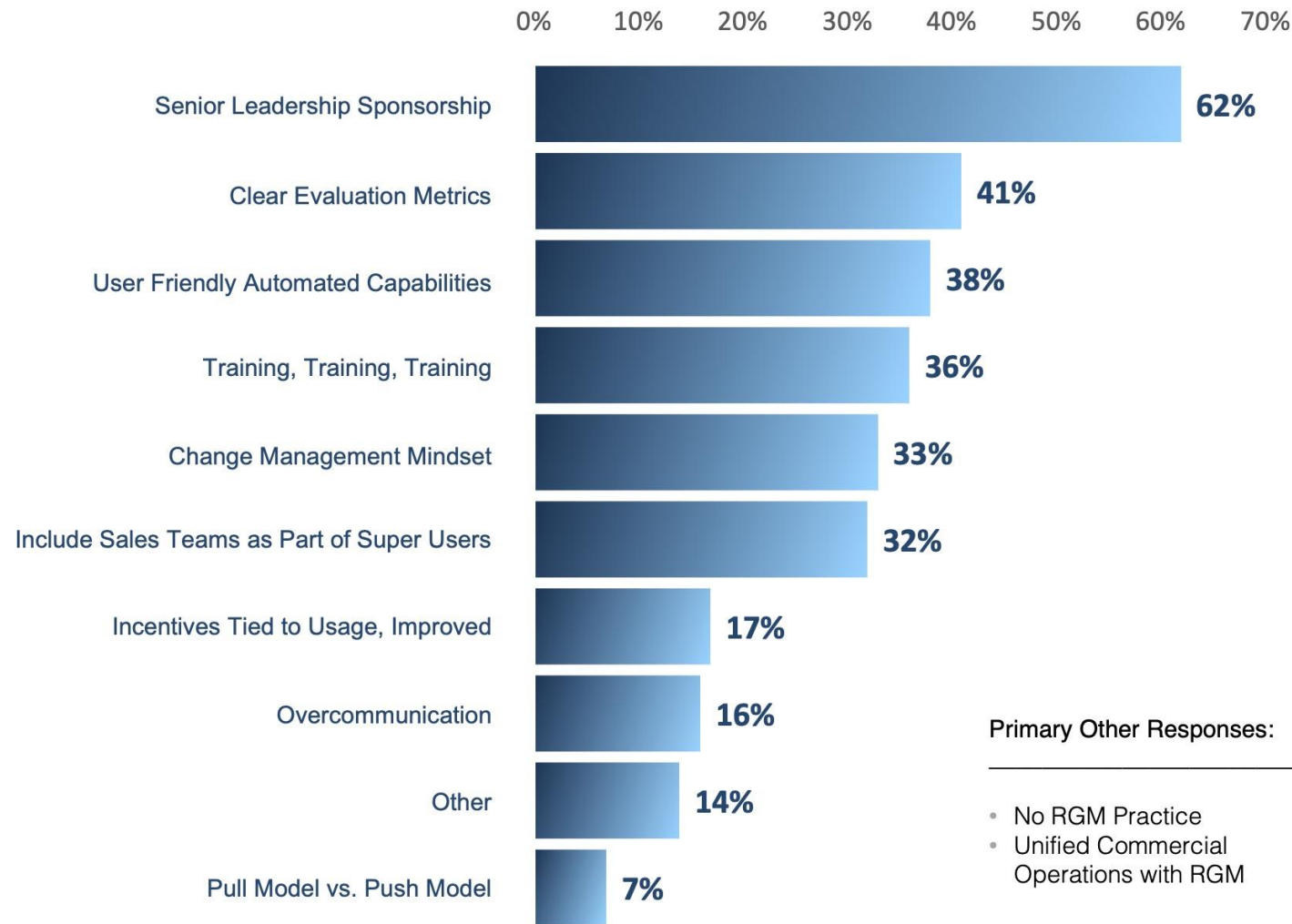
## When you deployed RGM training, which roles were key priorities as you launched a new practice



Primary Other Responses:

- Haven't launched RGM training

# What have you found to be the most helpful as you bring along Sales partners and they learn, embrace, and gain an RGM mindset? (Select all that apply)



Transforming an organization's RGM mindset is challenging and requires a deliberate change management process.

According to POI's survey, **sixty-two percent** of respondents emphasized the importance of senior leadership sponsorship in driving the transformation. This step is critical for the success of RGM initiatives or any cross-functional project.

**Forty-one percent** ensured clear evaluation metrics.

**Thirty-eight percent** deployed user-friendly capabilities to automate the RGM process and insights.

**Thirty-three percent** emphasized training, and thirty-two percent helped drive the RGM mindset with change management.

# Revenue Growth Management Framework and Practice Evolution

Many manufacturers ask how to start or evolve an RGM practice.

POI has broken down the RGM evolution into a framework of three phases based on POI Manufacturer Connects and share group input.

It is critical to focus on embedding the people and process aspects across the organization in addition to the technology enablers.

The ultimate goal is to achieve an RGM mindset across the enterprise. The most successful organizations embed the RGM enterprise mindset into their culture.

Whether you are getting started today or have an established RGM practice, there are POI resources and solution provider best practices to help you on your journey.

<https://poinstitute.com>

|   | PHASE 1: NEW RGM<br>Operational   | PHASE 2: INTERMEDIATE RGM<br>Cross-functionally Champion, Expand, Imbed, Incent  | PHASE 3: ADVANCED RGM<br>Strategic End-to-End Value Chain  |   |   |
|---|---|--|--|---|---|
| <b>ORGANIZATION/<br/>PEOPLE</b><br><br>Build a Center of Excellence   | CoE/global team: Dir/VP level 1-3 FTE<br>Regional teams: Mgr/Dir level 1-2 FTE/region<br>Local market teams: Mgr/Dir level 1-4 FTE/market   | CoE/global team: Sr Mgr/Dir/VP level 3-6 FTE<br>Regional teams: Mgr/Dir/VP level 2-3 FTE/region<br>Local market teams: Analyst/Mgr/Dir/VP level 1-8 FTE/market   | CoE/global team: Dir/VP level 5+ FTE<br>Regional teams: Mgr./Dir/VP level 2-3 FTE/region<br>Local market teams: Analyst/Mgr/Dir/VP level 1-8+ FTE/market   |   |   |
| STRATEGY  |   |  |  |   |   |
| <b>BUSINESS<br/>PROCESS</b><br><br>Develop and socialize a clear strategy and roadmap, including the process of embedding an RGM mindset across the organization. | Develop a clear strategy. Build capability roadmap. Proof of concept. Focused on quick wins in key countries, customers, and brands. Gain Senior leadership support. Identify key metrics. Drive Joint Value Creation.<br><br>Communicate enterprise revenue management vision. Engage key stakeholders across the organization and socialize early benefits & wins by business unit. Set the stage for broader deployment. | Begin to scale RGM capabilities across a broader sub-segment of the organization. Integration of RGM mindset into working business processes. Top-down drive from senior leadership on business priorities linked to RGM (e.g., drive profitability). End-to-end alignment on key organizational metrics enabled by RGM (e.g., gross Profit, Gross Margin, Cash Flow, etc.)<br><br>Standardize basic RGM tools across customers/markets. | Continue to scale RGM capabilities to capture the full enterprise and broaden the RGM mindset into additional business processes. Linkages between marketing, finance, sales, demand planning, and supply chain are realized. Automation of capabilities across the full enterprise are gaining efficiencies that are communicated broadly, and processes are evaluated as the work has become less tactical and more strategic. Need to evaluate process as the “work changes.” |   |   |
| <b>ANALYSIS<br/>&amp; REPORTS</b><br><br>Turning data into actionable analytics and insights  | <b>Pricing Diagnostics</b><br>Price Ladders<br>Price Pack Curves<br>Pricing Trends/Progression<br><br><b>Promotion Diagnostics</b><br>Trade Promo ROI<br>Promotion what-if scenarios<br>Improved inputs into S&OP Planning<br><br><b>Assortment</b><br>SKU Profitability/Priorities (Power Rankings)  | Utilize more Advanced Analytics/Tools/Capabilities:<br>Price Elasticity<br>Trade Promotion and Pricing Optimization<br>Mix Analysis<br>Purchase Structures<br>Market Segmentation<br>Trade Analysis (Gross to Net, Margin Pools, etc.)<br>Channel Management<br>Advanced Scientific S&OP Planning<br>Cost to Serve   | Advanced Consumer Segmentation: Link RGM analytics to consumer landscape with insights & research (Shopper, Occasions, Trip Mission, etc.) to uncover retail and shopper dynamics<br><br>Deduce industry and category trends and develop category growth stories for customers<br><br>Trade architecture<br>Evaluate innovation potential and execution<br>Competitive strategy & war-gaming<br>Personalized consumer offers<br>Farm to Table – Value Chain Forecasting          |   |   |
| <b>SYSTEM &amp;<br/>CAPABILITIES</b>  | Excel<br>Tableau<br>Begin investigating automated capabilities (Reach out to POI for the EPx Vendor Panorama)   | Automated RGM capabilities* (RGM suite and/or TPMx with RGM capabilities). Ensure models are updated on a regular basis. Provide adequate training for each role.  | Utilize predictive and prescriptive analytics (*Phase 2 & 3 combined depending on the vendor or capability of choice and manufacturer roadmap & phasing approach).   |   |   |
| <b>RGM<br/>LEVERS</b>   |  Price Strategy & Architecture  |  Promo Strategy & Management  |  Mix/Assortment Management  |  Investment Architecture, ROI & Trade Optimization |  Portfolio & Brand Strategy Including Innovation |

Regardless of whether your organization's RGM team is new or advanced, RGM leaders must demonstrate exemplary servant leadership to weather difficult trade winds.

The ability to gain cross-functional alignment requires active listening, communication, reflection, and intuition to connect the dots. RGM leaders must use storytelling to communicate business unit and organizational benefits, impact, and roadmap and bridge siloed needs through negotiation.

The leader who can effectively combine analytics with soft skills will be able to lead an organization, demonstrate value to all stakeholders, and maximize investments in people, processes, and technology.



# Integrated Business Planning (IBP)

# Connecting enterprise market research & strategy with sales, financial, and operational plans benefits the following:

- **Cross-functional Insights:** Captures, discusses, and incorporates valuable insights into the enterprise plan, fostering collaboration and buy-in across all business units.
- **Organizational Alignment:** Ensures stakeholders align on the "One Plan" and take ownership of their business unit's actions to execute it effectively.
- **Stronger Collaboration:** Breaks down silos between sales, marketing, finance, and supply chain teams, fostering cross-functional teamwork.
- **Enhanced Communication:** Improves communication, decision-making, visibility, and responsiveness across the enterprise and business units.
- **Dynamic Planning:** Establishes an ongoing, collaborative, and rolling planning process to analyze market changes, course-correct strategies, and realign with enterprise objectives.
- **Enterprise Planning Efficiency:** Streamlines the planning process, saving time and resources while maintaining precision and alignment.

*Integrating people, processes, and capabilities*



# Additional IBP Benefits

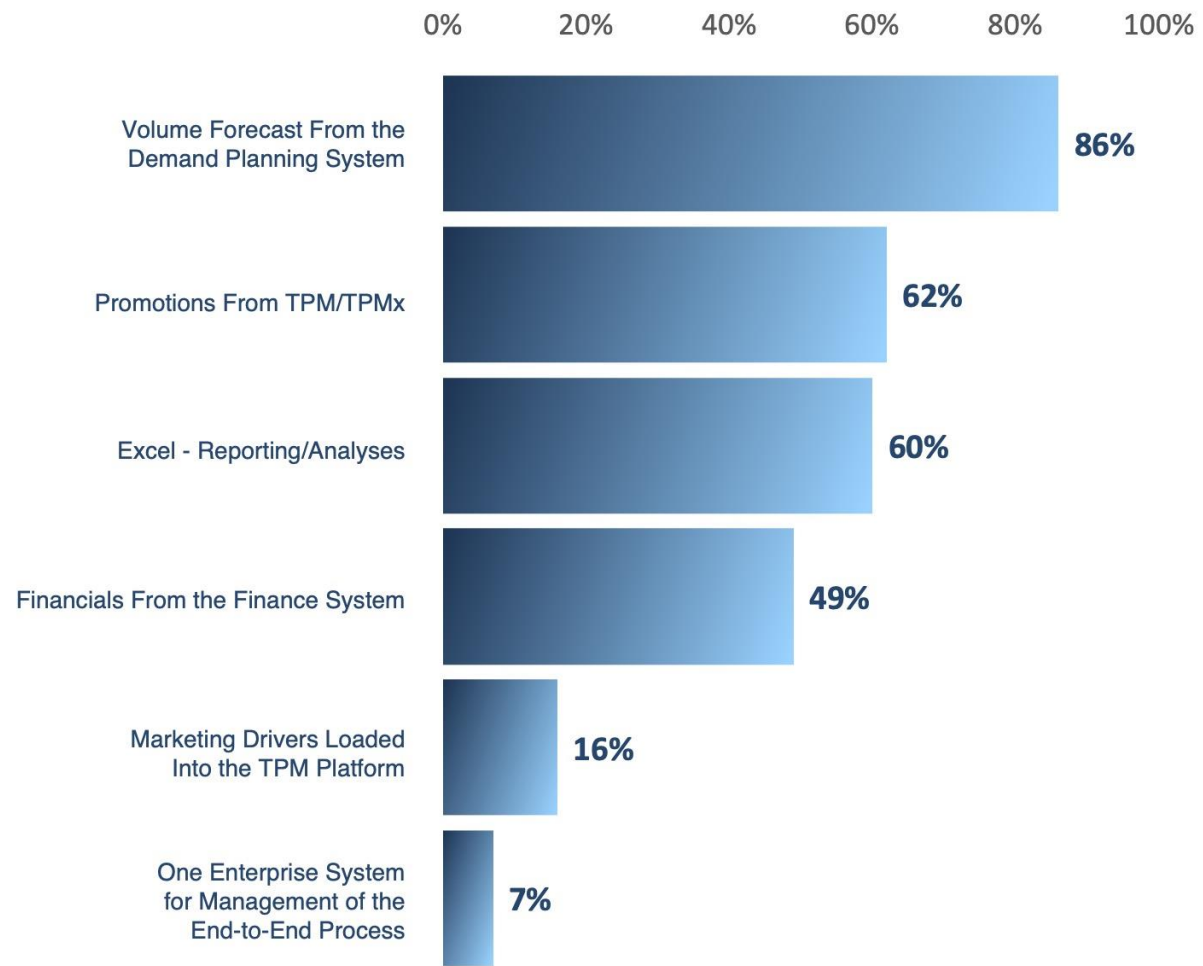
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**A successful IBP process balances resources, constraints, and financial goals to improve end-to-end enterprise planning, profitability, and growth, even amid strong economic and global headwinds.**

- **Customer-Centric Focus:** Ensures plans are tailored to customer and consumer needs, optimizing products, promotions, and supply chain strategies.
- **Data-Driven Decisions:** Integrates real-time data and predictive analytics, enabling informed, proactive decision-making.
- **Improved Forecast Accuracy:** Aligns demand forecasts with supply chain planning, reducing inefficiencies, and optimizing resource use.
- **KPIs and Accountability:** Drives accountability by setting clear KPIs and incentives that tie directly to organizational results.
- **Faster Decision Making:** Enables quicker, more informed decisions by integrating real-time data and predictive analytics.
- **Agility and Resilience:** Empowers teams to adapt quickly to market shifts, disruptions, and evolving consumer behaviors, ensuring competitiveness and resilience.
- **Resource Optimization:** Maximizes efficiency and ROI through better allocation of budgets, time, and resources.
- **Sustainability Alignment:** Incorporates sustainability goals into planning processes, supporting environmental, social, and governance (ESG) commitments.

**Optimally, the IBP process improves retailer fulfillment, innovation success, and overall customer and consumer satisfaction.**

# What sources of data input are being used for integrated business planning (IBP)? (Select all that apply)



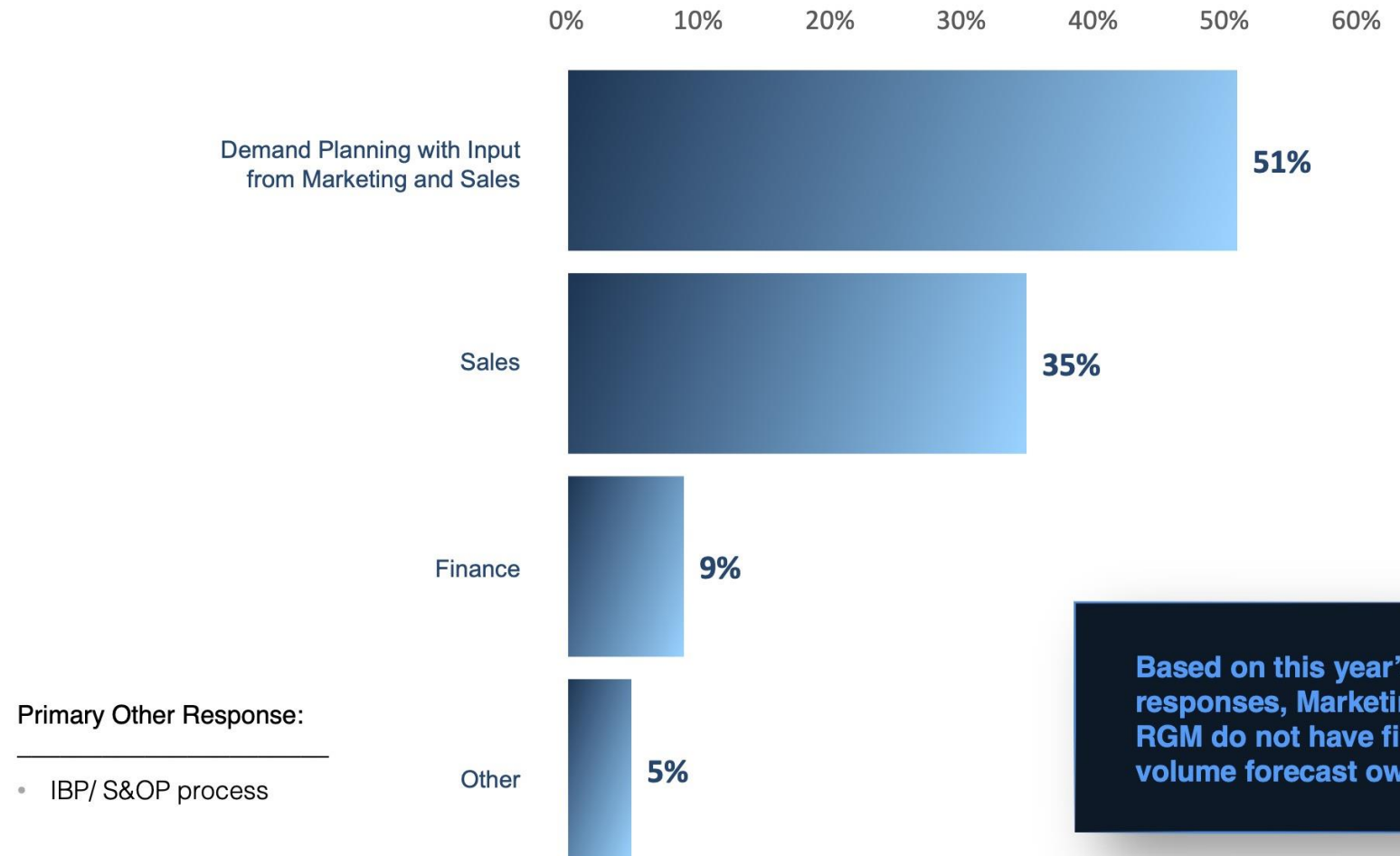
For many manufacturers, the IBP process often relies on numerous disparate sources of information, which can create inefficiencies and silos within the organization. This presents a significant opportunity to streamline data sources, integrate systems, and automate key workstreams. By centralizing and harmonizing enterprise planning inputs, manufacturers can enhance the IBP process, ensuring it delivers richer cross-functional insights and a clearer understanding of the drivers impacting organizational performance.

Moreover, many of the data inputs traditionally used in IBP are grounded in backward-looking historical analyses. While historical data remains valuable, it is increasingly insufficient in addressing today's rapidly changing consumer behaviors and market dynamics. With shifts in consumer preferences, omnichannel shopping patterns, and new competitive pressures, relying solely on historical trends may fail to provide a reliable forecast for future consumption.

To stay ahead, organizations must pivot toward incorporating forward-looking data sources, such as real-time marketing analytics, consumer sentiment, and behavioral drivers. These insights allow businesses to anticipate and adapt to evolving demand patterns, align promotional and supply chain strategies more effectively, and make IBP a more predictive and agile process. Emphasizing forward-looking data ensures that IBP becomes not just a planning tool but a strategic advantage in navigating uncertainty and driving growth.



## Which department owns the final volume forecast? Please note ownership vs. noting the multiple teams who provide inputs into the forecast.

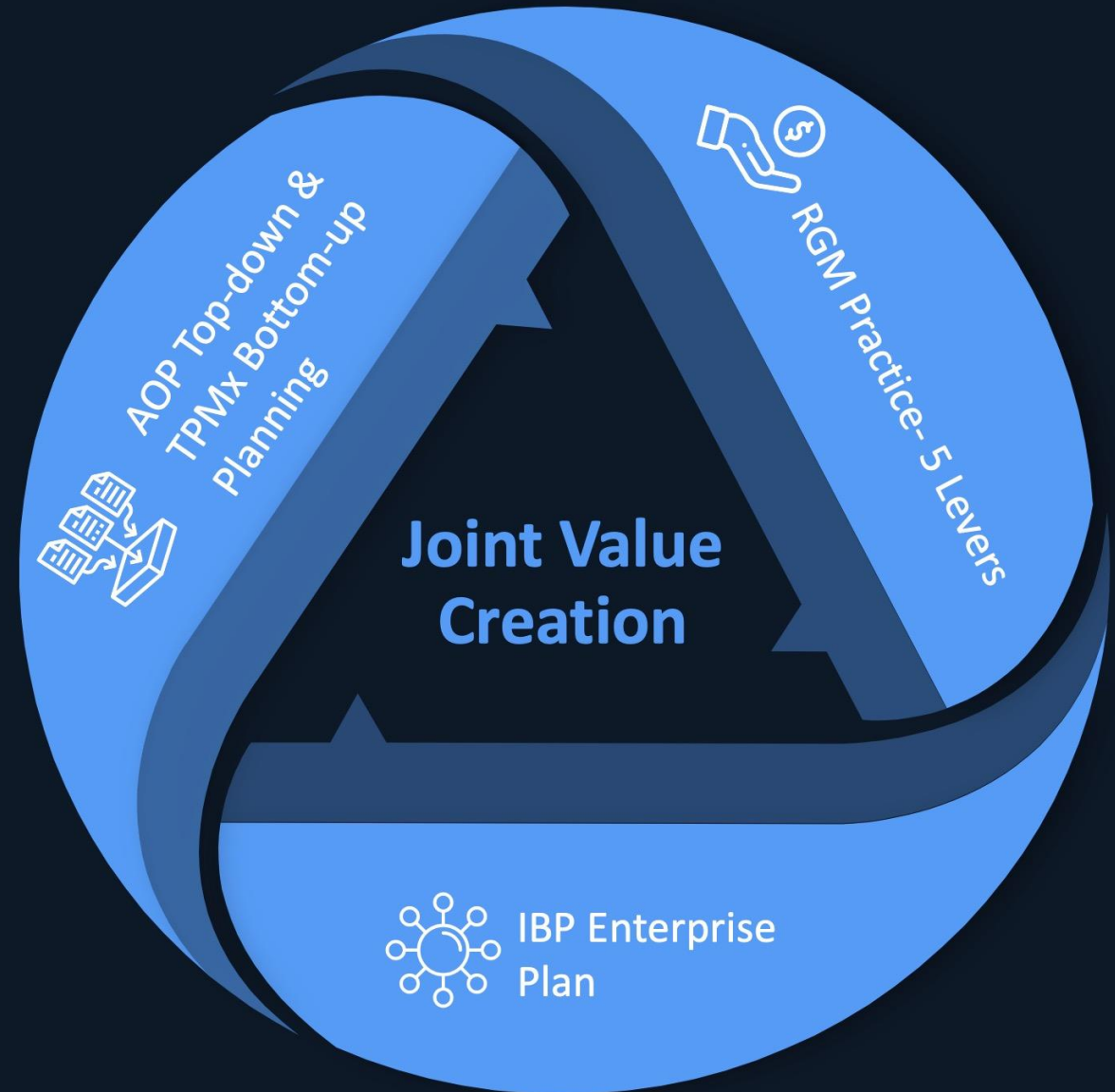


**Based on this year's survey responses, Marketing and RGM do not have final volume forecast ownership.**

## Top-down/Bottom-up Planning, RGM, and IBP Deliver:

- Automated & Connected Commercial Planning
- Efficient Growth & Profitable Business Impact
- A Competitive Advantage & Strategic Differentiator

**Holistic Enterprise Planning  
& Joint Value Creation**



# Advancing Intelligent Planning and Analytics

# How Are You Building AI Into Your Enterprise Strategy?

**This is a strategic question that every retailer, manufacturer, technology vendor, and consultant partner should be asking.**

According to the latest POI survey, **14%** of respondents have already begun incorporating AI capabilities into their TPMx promotion cycles, reflecting the early stages of adoption. Meanwhile, **44%** report that their organizations are still 2–3 years away from enabling AI in these processes, highlighting a significant opportunity for growth and innovation.

Today's advanced TPMx platforms leverage AI to streamline critical tasks, including delivering precise baselines, calculating real-time promotion uplifts, and projecting plan volumes with enhanced accuracy. These capabilities empower organizations to optimize decision-making, improve promotional outcomes, and stay competitive in a rapidly evolving market. Additionally, some vendors are taking AI further by integrating machine learning systems that gather competitive intelligence from the internet and combine it with internal consumer behavior data. This approach enables companies to better understand price elasticities, predict customer trends, and develop more effective strategies for revenue growth management.

In 2024, **9%** of the respondents are already working on integrating AI capabilities to impact retail execution, while **30%** believe their organizations will embrace AI in RetX when it becomes more affordable and proven in 2-3 years.

There are current examples of AI utilization in retail execution, just as there are with promotions, deductions, inventory management, and more. Many retail execution vendors are currently incorporating AI into their solutions. AI can greatly improve worker productivity and enhance decision-making at the store level. It is crucial for organizations to understand the importance of having offline capabilities, which can bridge the gap where there is limited bandwidth.

**Intelligent automation can perform routine, predictable tasks and enables an organization to re-deploy resources to more strategic work. Intelligent automation can work 24 hours a day, providing enhanced service hours & scalability.**

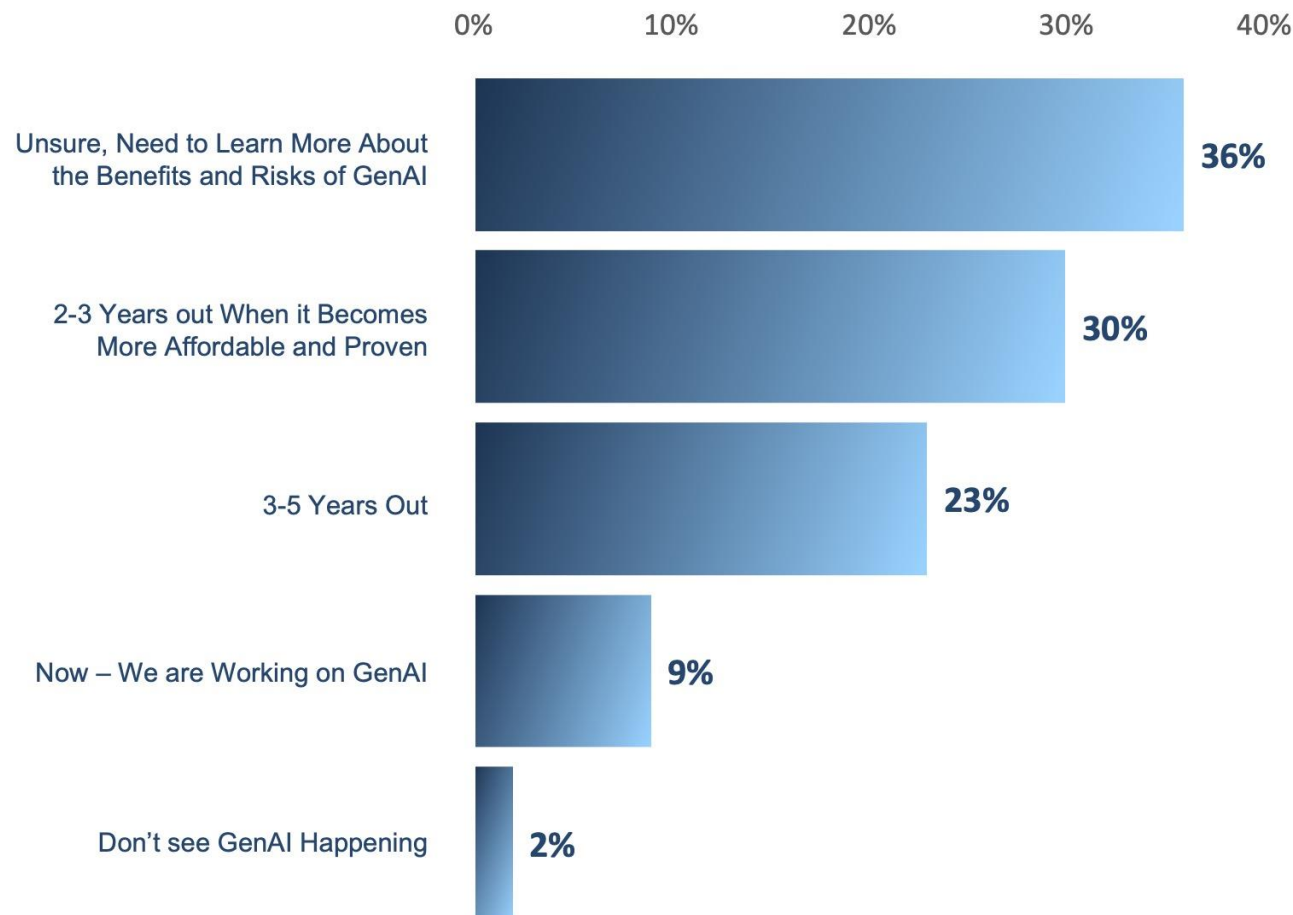


## **POI Recommendations:**

If you're considering implementing new Enterprise planning and optimization capabilities, it's important to assess how AI can enhance efficiency across people, processes, and systems.

Systems are an investment, and you don't want to look back 3 years from now and wish you had considered the potential of what AI can do for your organization.

## When do you see Generative AI impacting Holistic Enterprise Planning?



Opportunity: Determine how non-technical users can use Generative AI to enhance their roles.

POI research reveals that **Generative AI (GenAI) capabilities and usage are an opportunity for the CPG industry:**

**Nine percent** are taking action now and are already working to incorporate Generative AI into their company's Holistic Enterprise Planning process.

**Thirty-six percent** are unsure and need to learn more about the benefits and risks of Generative AI.

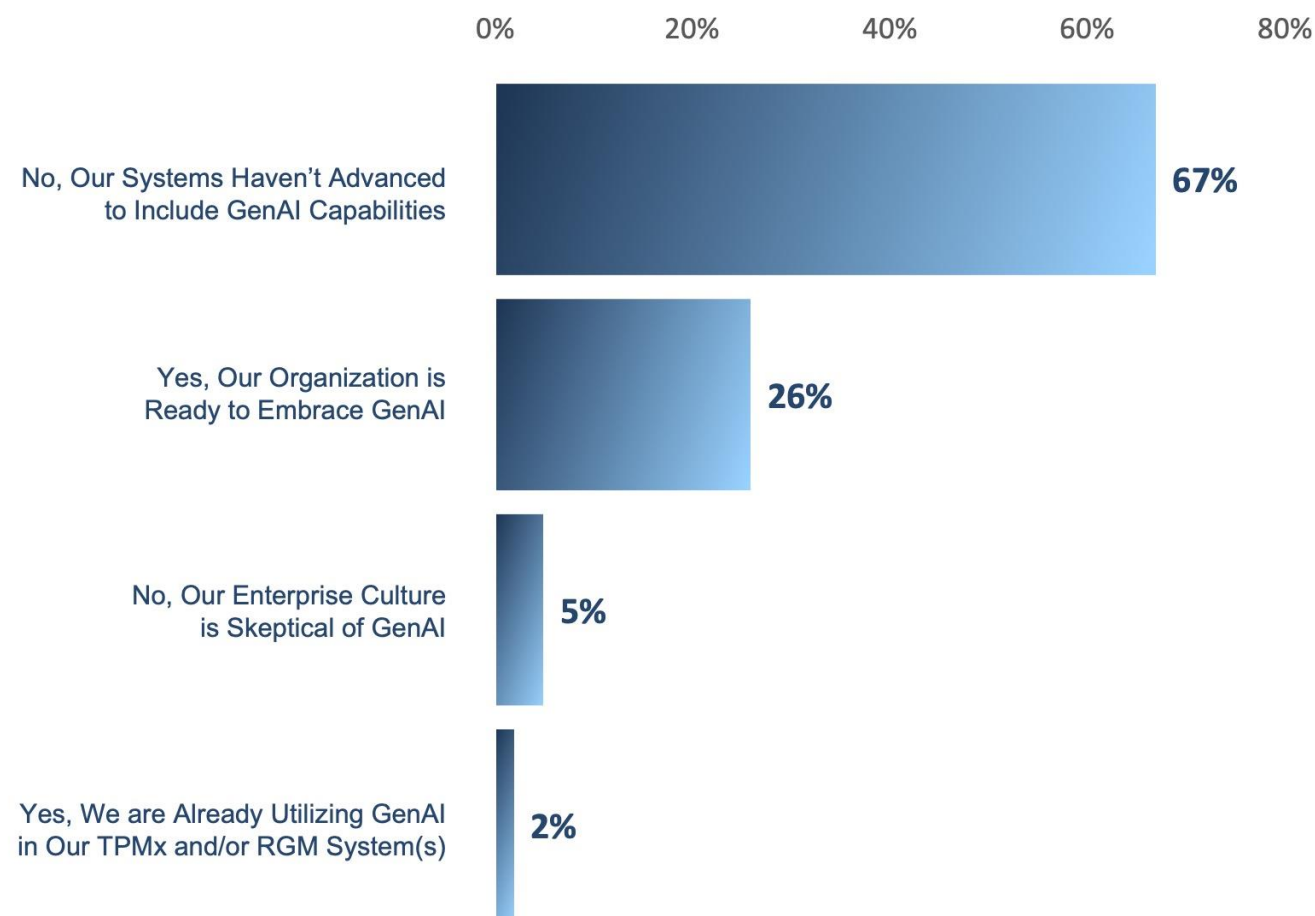
**Thirty percent** of respondents see Generative AI impacting in 2 to 3 years when it becomes more affordable and proven.

**Twenty-three percent** of survey respondents noted they see Generative AI impacting holistic enterprise planning in 3 to 5 years.

**Two percent** of respondents don't see Generative AI impacting holistic enterprise planning.

Over the past three years, POI Summit attendees have witnessed the growing impact of Generative AI on RGM analyses. While this technology is still evolving and requires users to validate system recommendations, POI anticipates that Generative AI and related advancements will significantly enhance the enterprise planning process in the near future.

## Do you feel your organization will embrace using Generative AI with your TPMx and RGM systems to improve promotion execution and optimization?



### A Transformative Opportunity for CPG Planning:

Despite its proven potential, the adoption of Generative AI in the CPG industry remains nascent. As the graph illustrates, only **2%** of organizations have actively integrated Generative AI into their TPMx and RGM systems. However, with **26%** of respondents indicating readiness to embrace this technology, there is a clear appetite for innovation, signaling a pivotal moment for the industry to leverage AI for enhanced planning, execution, and optimization.

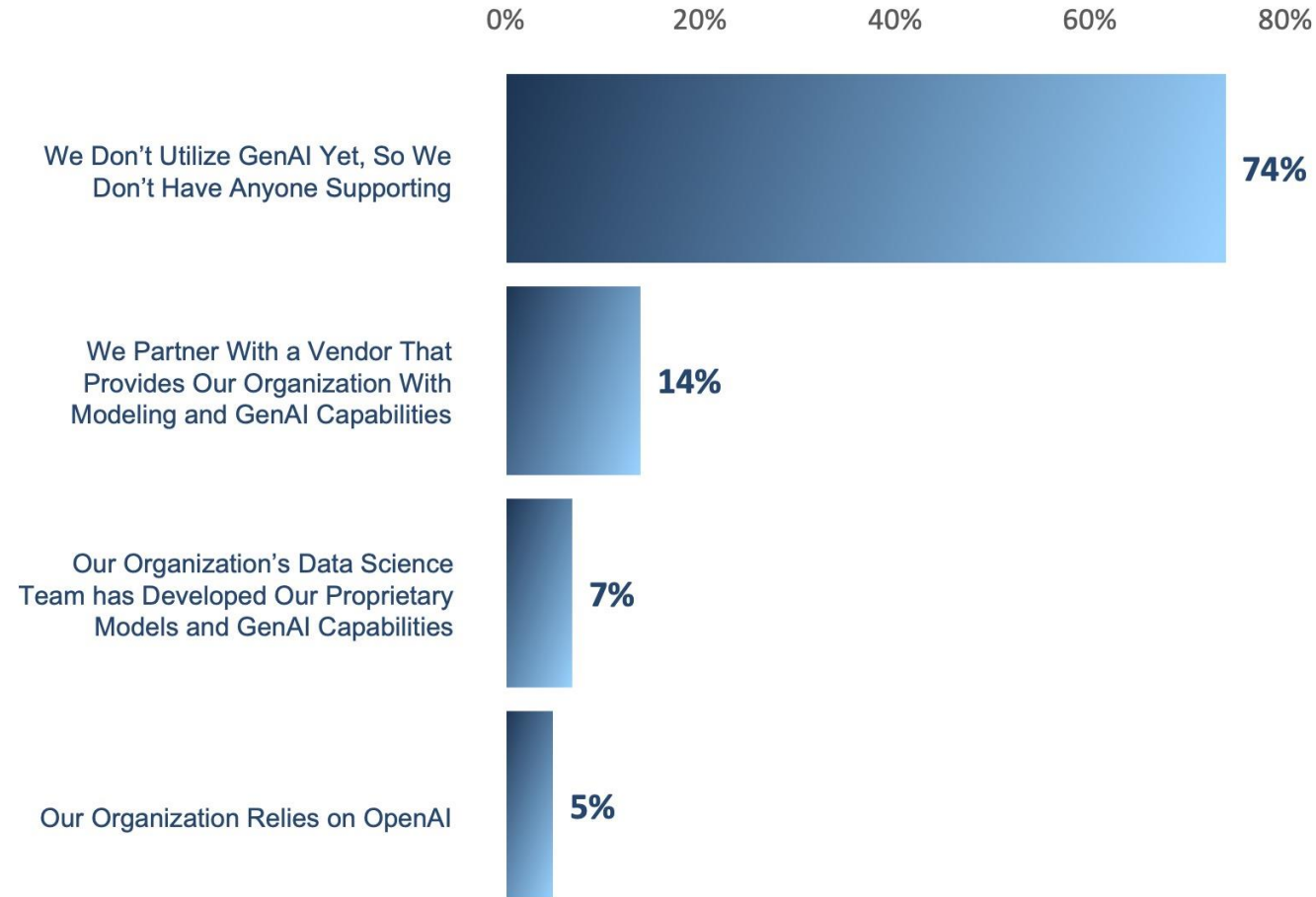
### Bridging the Gap Between Potential & Adoption:

While **67%** of organizations report that their systems have not yet evolved to include Generative AI capabilities, this highlights a significant opportunity for forward-thinking companies to lead the charge. Those who embrace AI-powered tools early will gain a competitive edge by streamlining promotion execution and unlocking new efficiencies in revenue growth management. The industry must address technical and cultural barriers to accelerate adoption.

### Breaking Through Cultural & Technical Barriers:

The survey reveals that cultural skepticism toward Generative AI is relatively low, with only **5%** of respondents citing it as a barrier. This suggests that the primary challenges lie in system maturity rather than resistance to change. By focusing on upgrading infrastructure and demonstrating AI's tangible benefits, the CPG sector can fast-track the integration of Generative AI, transforming how planning processes are executed.

# Who is supporting your organization's GenAI models?



## Key Insights:

### 1. Massive Opportunity for Adoption

**74% of organizations have yet to adopt GenAI**, highlighting an untapped opportunity to drive efficiency and innovation through AI-enabled processes.

### 2. Vendor Partnerships Drive Early Success

**14% rely on external vendors** for GenAI capabilities, showcasing how third-party expertise helps bridge gaps in knowledge, infrastructure, and resources.

### 3. Proprietary Innovation is Emerging

**7% have in-house teams developing proprietary GenAI models**, setting the stage for competitive advantages in predictive insights and operational optimization.

### 4. OpenAI Usage is Minimal

Only **5% leverage platforms like OpenAI**, suggesting broader potential for these tools to democratize access to generative technologies.

## Call to Action:

Organizations need to prioritize GenAI exploration to remain competitive. They should leverage vendor partnerships and accessible platforms like OpenAI while learning from early adopters to accelerate their AI maturity curve.

# AI With Purpose

## Additional CPG Industry Uses of Artificial Intelligence Across Holistic Enterprise Planning & Execution:



**Product Strategy:** Optimize innovation, product offerings & mix.



**Beyond Customer Satisfaction Analysis:** AI systems can provide real-time trend detection by analyzing online behavior, social media, and e-commerce platforms, enabling manufacturers to adjust marketing and inventory strategies swiftly.



**Personalized Content:** With online, content is king. Create marketing assets & targeted campaigns tailored to an individual or group's specific needs and desires to generate engagement.



**Pricing Strategy:** Optimization of innovation, everyday on-shelf, and promoted pricing. Utilize scenario planning to develop pricing strategies that maximize profits, volume, and consumer engagement across channels, retailers, and brands.



**Enterprise Forecast:** Artificial intelligence utilizes predictive and prescriptive capabilities to anticipate the enterprise forecast through advanced modeling of inputs to project enterprise revenue and volume. Evaluation can include AOP volume/spend/targets, baseline, incremental lift, and driver inputs like promotion timing, depth of discount, duration, etc. Leading organizations also incorporate supply constraints into the AI modeling. AI greatly impacts an organization's ability to get to the desired "One Forecast" and "One Version of the Truth" and positively impacts the integrated business planning process (IBP).



**Claims/Deductions:** Empowering the process with AI can automate an estimated 80% of manual trade and non-trade claims/deductions processing. Issues and trends can be identified, prioritized, and cleared quickly. Enables deduction specialists to focus on the issues that require deeper investigation. It is estimated AI automation reduces deduction resolution timing by 50%.



**Retail Execution Planning:** From account scoring, route planning, retail activity planning (RAO), guided selling, distributor opportunities, telesales prioritization, perfect store recommendations, and addressing both OLA (online availability) and OSA (on-shelf availability).



**Chat Bots:** Gather online questions and data from customers and systematically recommend answers and solutions. Prepare data for secondary human assistance to expedite solutions when necessary. Employees have time to focus on issues that require personalized attention.



**Customer Satisfaction:** Through scanning of social media posts, reviews, ratings, and other customer data, brands gather insights on how customers are engaging with and perceive their brand, as well as the competitive marketplace.



**Optimizing Supply Chain:** Including sourcing, procurement of raw material pricing, transportation optimization, predicting inventory location, and product movement throughput.

# Additional CPG Enterprise AI Use Cases



## **Sustainability Efforts:**

AI can optimize production processes to reduce waste and energy consumption, align with environmental regulations, and enhance sustainable practices. For example, predictive analytics can improve material utilization or forecast renewable energy needs for manufacturing.



## **Workforce Augmentation:**

AI can enhance workforce productivity by automating repetitive tasks, enabling employees to focus on higher-value strategic activities. AI-powered training tools also improve employee onboarding and skill development.



## **Innovation Acceleration:**

Generative AI can assist in R&D by simulating product formulations, designing new packaging, or even brainstorming marketing campaigns based on consumer trends.



## **Enhanced Supplier Collaboration:**

AI-powered platforms enable better communication and collaboration with suppliers by predicting demand fluctuations and optimizing order quantities, reducing the risk of stockouts or overstocking.

**The market landscape and consumer behavior are evolving rapidly,** prompting organizations to explore the potential of Artificial Intelligence to gain a competitive advantage. By leveraging AI, companies can quickly identify and respond to customer demands, enhance the overall customer experience, optimize their product offerings, increase market share, automate internal processes, reduce costs, improve revenue generation, and mitigate risks, all while achieving efficient growth.

# Advancing Enterprise Planning With AI



**Historically**, traditional trade management was labor intensive, with a salesperson's time spent on baseline and promotion analyses and development. Offline Excel what-if and post-event evaluation (ROI analysis) were manual, less than accurate, not to mention time-consuming. Many systems lacked solid reporting, and most didn't deliver upon enterprise visibility of trade or an accurate forecast. None of the historical trade promotion systems could successfully bring together digital, marketing, eCommerce, or other elements of our blurring enterprise spend.



**With today's Holistic Enterprise Planning** SaaS capabilities, we are beginning to utilize fully digitalized platforms that can serve the cross-functional organization. These highly automated enterprise platforms perform complex advanced modeling with AI/ML to deliver baselines, calculate real-time uplift, and project plan volume. This is essential to an accurate sales forecast and critical for the holistic organization that needs one version of the truth around baselines. Post-event ROI analysis and what-if promotion scenario capabilities are automated and embedded within the sales planning evaluation process.



**The most advanced omnichannel platform capabilities** anticipate market opportunities and risks and prescribe specific actions to execute across promotions, pricing, assortment, etc., to gain an advantage against competitors. A few leading companies access and utilize daily retail consumer data to maximize marketing and sales planning. The most advanced solutions offer manufacturers and retailers the ability to specifically address changing consumer behavior and target the right innovation, promotions, pricing, displays, marketing, etc., at the right time to engage the consumer and positively impact the buying decision.

While many solutions offer enterprise planning, a leading few solution providers can deliver an end-to-end, full value chain approach bringing capabilities from farm to fork.

Enterprise reporting and dashboards have advanced, and many platforms have extensive social capabilities to keep teams connected about plan changes. In-flight monitoring is also advancing across the platforms. As companies connect their trade planning and retail execution systems, teams can manage unexpected challenges with agility and respond more effectively to consumer and retailer needs.

The platforms available in 2025 will help the enterprise develop effective and accurate plans, quickly support the Integrated Business Planning and Joint Customer Business planning efforts, and enable organizations to reduce tactical work in favor of more strategic priorities.

**If your company is looking to advance Enterprise Planning (TPM, What-if Scenario Planning, ROI, RGM/TPO) or Retail Execution capabilities, please refer to the 2024 Vendor Panorama, [poinstitute.com](https://poinstitute.com), to dive deeper into the topic and understand current vendor capabilities.**

# Advanced Modeling

## Based on POI's Latest Enterprise Planning and Retail Execution Vendor Panorama Research:

While the technology exists to maximize AI's potential, most Enterprise Planning and Retail Execution solution providers currently focus on statistical models and predictive AI modeling for specific, narrowly defined planning and reporting use cases (e.g., automating baselines). While capable teams can generate insights and recommendations, the industry at large has yet to fully adopt or maximize AI's broader capabilities.

Select vendors have advanced modeling approaches and can deliver:

**Decision-Making AI:** AI has evolved from use-case-specific applications to powering end-to-end enterprise planning ecosystems, which enable real-time updates, cross-functional collaboration, and adaptive business strategies.

**Nonlinear Problem Solving:** Select leading vendors are leveraging advanced nonlinear modeling to address complex interdependencies, unlocking transformative opportunities for businesses.

**Strategy Creation:** AI moves beyond predictive analytics to dynamically generate sophisticated, scenario-based go-to-market strategies. Generative AI enables organizations to adapt to changing consumer behavior, market shifts, economic headwinds, and stay ahead of the competition.

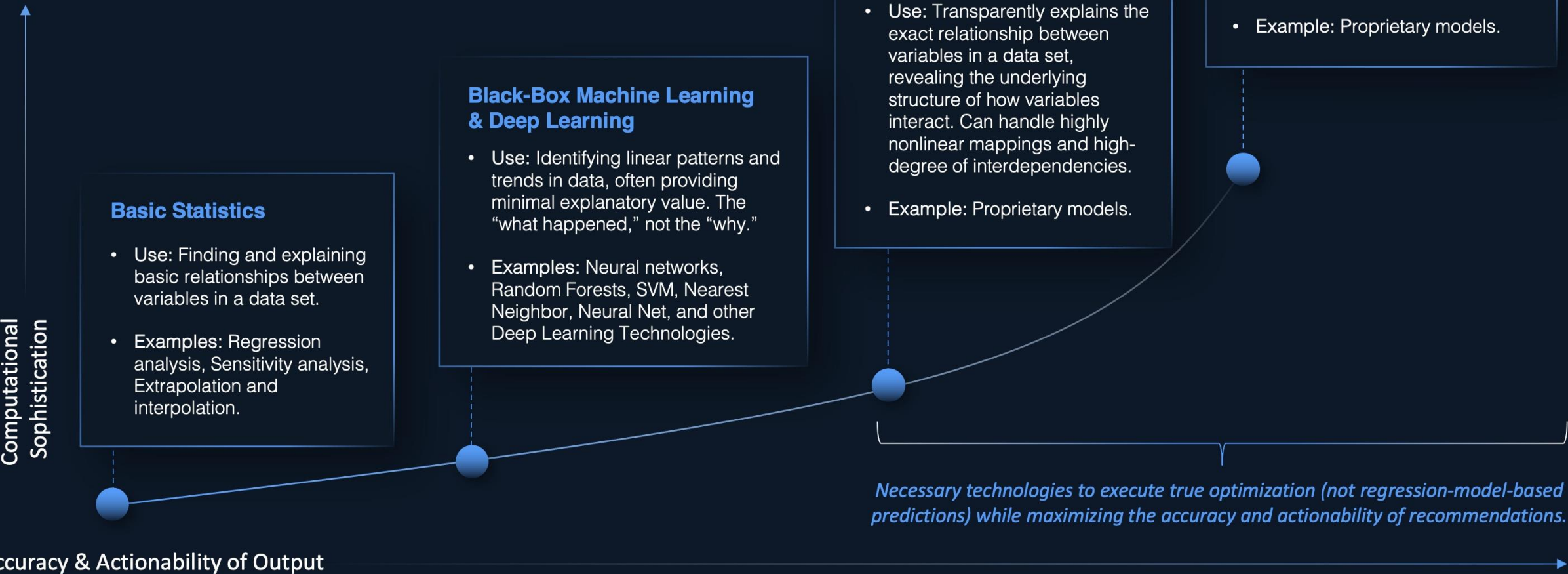
**Glass-Box AI for Transparency & Trust:** Breakthrough mathematical analytics delivers actionable, transparent recommendations in natural language, which increases explainability, fosters trust, and drives faster adoption.

Organizations with leading-edge AI modeling can respond dynamically to market changes, optimize interdependent variables, and unlock significant enterprise value.

**If your company is looking to advance Enterprise Planning or Retail Execution capabilities and desire to learn more about the topic, please refer to the 2024 Enterprise Planning and Retail Execution Vendor Panorama, [poinstitute.com](https://poinstitute.com), to dive deeper into the topic and to understand each vendor's capabilities and modeling approach.**

# Evolution of Analytical Modeling Techniques

**The type of model matters** - Advanced modeling increases the understanding (why?), accuracy, and actionability of RGM recommendations:



Thank you to Enterra Solutions, LLC. who provided the Analytical Modeling Technique graphic  
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# The Intelligent Enterprise



## A dynamic future...

Incorporates a cross-enterprise analytical capability that leverages advanced technologies to understand your business and marketplace, perform advanced optimization, and systematically elevate the decision-making capabilities of the organization. Intelligent capabilities can be utilized as the central hub for enterprise analytics, optimization, and market execution and can be the catalyst for unifying and coordinating the actions of Corporate Strategy, Marketing, Innovation, Sales, Finance, and Supply/Operations.



## The way of the future is to sense things and quickly capture the learning...

to impact decision-making for both manufacturers and retailers and ultimately offer consumers the right product at the right time and with the right personalized offer.



## The path forward is a blend of art and science.

The combination of skilled employee knowledge, intelligent systems, and advanced analytical and automated execution capabilities provides organizations with a competitive advantage in easily adapting to new consumer behavior and market conditions.

Integrating intelligent systems across an enterprise ecosystem can support cross-functional AOP top-down planning, pricing, innovation, go-to-market strategy development, promotion optimization & planning, forecasting, deductions, supply chain optimization, and advanced analytics across the company.

As organizations integrate systems of intelligence, roles and the work that is accomplished will naturally change.

This enterprise transformation can serve as a catalyst for breaking down internal silos. However, it is essential for organizations to implement change management throughout the process.



# Foodservice



# Foodservice Trends:

Consumers are sensing a slight stabilization in inflation, encouraging restaurants to entice patrons back with thoughtfully curated menus and immersive dining environments. These efforts emphasize healthy, elevated yet simple dishes that prioritize sustainability, bold new flavors, and creative, memorable settings. Simultaneously, the hybrid pick-up model remains critical, offering a premium yet practical way to enjoy quick, healthy, high-quality meals.

As environmental concerns grow, foodservice manufacturers are embracing sustainable practices, including reducing food waste, adopting eco-friendly packaging, and supporting local and organic sourcing.

Technology is also transforming operations by streamlining production, optimizing supply chains, and improving efficiency. Digital platforms and automation further enhance restaurant visibility and customer convenience, fostering growth and innovation in the industry. For example, the digitalization of restaurant sites can promote business, delivery, or reservation options online and attract new, curious customers.

## Global Flavors and International Snacking

Increased exploration of international cuisines, particularly through snackable options that introduce global flavors.

[Whole Foods Market](#) [Better Home & Gardens 2025 Food Trends](#)

## Personalization and Customization

Consumers are demanding tailored dining experiences, from customizable menus to options that cater to specific dietary preferences and health goals. There is a growing preference for personalized dining options, with establishments offering build-your-own concepts like burritos and grain bowls to cater to individual tastes.

[Webstaurant Store 2025 Trends](#) [Chocolate Academy Future of Foodservice-2025](#)

## Upscaling Fast Food

Consumers seek elevated dining experiences, leading fast-food chains to introduce premium items. For instance, McDonald's launched the Chicken Big Mac, and Shake Shack offered White Truffle Burgers.

[Webstaurant Store 2025 Trends](#) [Chocolate Academy Future of Foodservice-2025](#)

## Functional and Health-Focused Foods

Consumers are looking for food and beverages with added health benefits, such as hydration-focused drinks, high-protein meals, and gut-friendly options. Demand continues to grow for healthier and more sustainable food choices, leading to a surge in plant-based meat substitutes, dairy alternatives, and innovative plant-based ingredients. As the focus on health and nutrition intensifies, real ingredients will remain at the core of the conversation.

[Restaurant Association Trends](#)

# Anticipated 2025 Foodservice Trends:

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## Sustainability and Eco-Conscious Practices

Restaurants will prioritize sustainable sourcing, eco-friendly packaging, and waste reduction to meet consumer demands for environmentally responsible practices. [Glion 2025 Trends](#)

## Innovative Texture: Crunch and Beyond

The focus on textures like crunch is gaining popularity, enhancing the sensory experience of meals and snacks. [Better Homes & Gardens](#)

## Protein Innovation

A focus on diverse protein sources, including plant-based, lab-grown, and alternative proteins, will expand to meet consumer demands for variety and sustainability. [Better Homes & Gardens](#)

## High-Low Culinary Pairings

Combining premium ingredients with everyday comfort foods, creating unique and indulgent dining experiences. [Better Homes & Gardens](#)

## Southeast Asian and Regional Cuisine Exploration

Flavors and dishes from Southeast Asia are expected to see greater representation on menus, reflecting consumers' growing interest in diverse culinary traditions. [Better Homes & Gardens](#)

## Hybrid and Experiential Dining

Offering a blend of in-person and virtual experiences, as well as creating immersive, unique dining environments to attract customers.

[Chocolate Academy Future Of Foodservice 2025](#)

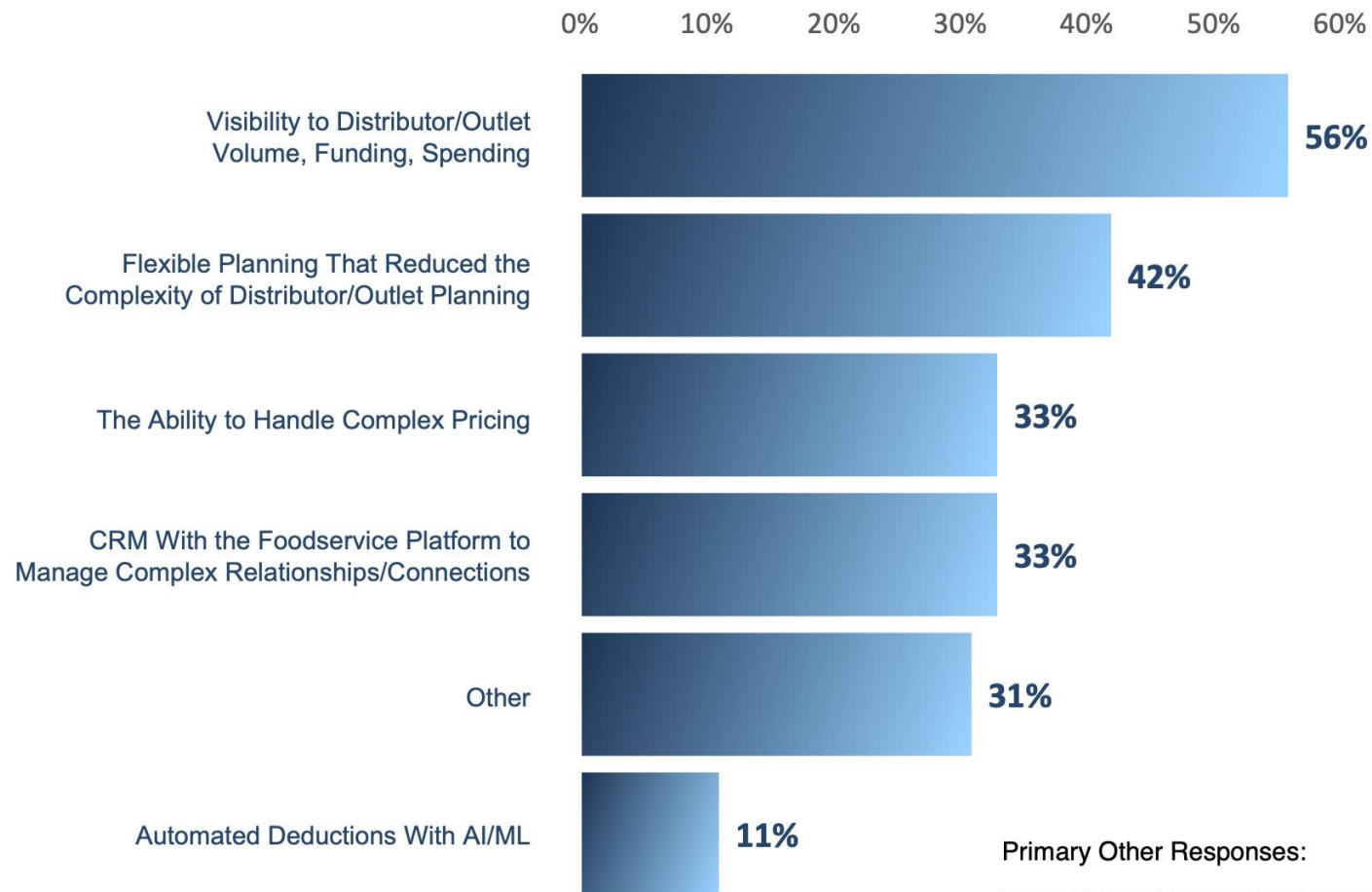
## Technology Integration/Digitalization

The use of technology has increased to address labor challenges, with handheld devices in full-service restaurants and self-service kiosks in quick-service restaurants. With digitized reservation systems, paying with smartphones, e-learning, and delivery platforms, the opportunity arises to promote your business and delivery or reservation options online and attract new, curious customers.

[Chocolate Academy Future Of Foodservice 2025](#)

**These trends indicate a focus on innovation, sustainability, and the blending of health and indulgence to cater to evolving consumer expectations in the foodservice industry.**

## When searching for new foodservice capabilities, which of the following do you look for? (Select all that apply)



### Primary Other Responses:

- No Need for Foodservice Capabilities



# Retail Execution

# What is Retail Execution, and how is it changing?

Retail Execution (RetX) refers to the activities that take place in a retail store, such as merchandising, promotional selling, and order replenishment. It is the final stage of the sales process for in-store purchases, representing the last opportunity for Consumer-Packaged Goods (CPG) companies to attract and retain the attention of their customers and ultimately close the sale. The main goal of retail execution is to bring the brand strategy to life and boost sales.

Consumer goods companies must leverage data, derive insights, and expedite quality decision-making to ensure that their products, go-to-market strategies, promotions, and pricing meet consumers' needs and desired retail experience, as consumers have omnichannel purchasing power.

Even though a well-implemented in-store strategy can set the customer experience apart, poor retail execution can lead to 25% of lost sales.

## The retail landscape has changed significantly...

Over the past few years, shopper behavior has dramatically changed. The need for a consistent brand experience is greater than ever, with consumers interacting through digital channels like never before.

The demand for direct-to-consumer (D2C) sales, omnichannel solutions, and digital presence is expected to increase in the upcoming years. It has been acknowledged that the future of retail execution is not solely limited to physical stores but also involves interactions with customers across all channels.

Consumers desire to be connected and engaged with their favorite brands.



## Top Retail Challenges >> Opportunities

Customers desire and use **multichannel** buying experiences.

Customers are looking for a **personalized and experiential** shopping experience.

Customers expect an **easy, seamless, consistent, and frictionless** omnichannel buying experience.

Consumers want **meaningful product experiences and connections** within thriving user communities.

# Several Challenges Emerged in In-store Retail Execution

The Consumer-Packaged Goods industry is adapting strategies to address these obstacles in 2025:

Rising  
Operational  
Costs

Omnichannel  
Opportunity &  
Consumer  
Expectations &  
Behavior Shifts

Enhancing  
Infrastructure  
with New  
Technologies  
(Cost/Training)

Sustainability  
Expectations &  
Pressure

Employee  
Retention/Labor  
Shortages/ Quality  
Labor/Increasing  
Labor Costs

First-Party Data  
Protection

Supply Chain  
Disruptions

# In-store Retail Execution is Continuously Evolving, Driven by Changes in Consumer Behavior, Technology, and Competition.

## Key trends currently shaping the retail execution landscape:



### Omnichannel Integration

Consumers expect a cohesive shopping experience, whether they're browsing in-store or online. A seamless integration between physical stores and online platforms is essential. Features like "buy online, pick up in-store" (BOPIS) and real-time inventory tracking are becoming standard.



### Visual Merchandising & Experiential Retail

Creating a memorable, engaging shopping experience is becoming a key focus. Stores are designed to showcase products and create a brand experience. This trend includes unique displays, interactive displays, live events, and pop-up temporary installation experiences that encourage customer participation.



### Personalization

Retailers are increasingly using data analytics and AI to personalize in-store experiences. This includes tailored product recommendations, personalized promotions, and even custom layouts based on shopper behavior. The goal is to make each shopper feel like the store is specifically curated for them.



### Smart Store Technologies

The use of smart technology in stores is growing. This includes things like self-checkout systems, smart shelves that notify staff when products are running low, and interactive displays that provide product details or promotions. These technologies enhance convenience for customers and improve operational efficiency.



### **Inventory Management and Data-Driven Execution**

Retailers are leveraging data insights to optimize product placement and ensure product availability. Advanced inventory management tools that utilize real-time data to ensure that shelves are stocked correctly, and items are consistently available are becoming more common.



### **Sustainability Initiatives**

Sustainability is increasingly important for both brands and consumers. Retailers are focusing on eco-friendly packaging, energy-efficient store designs, and responsible sourcing. Additionally, in-store recycling programs and sustainable product lines are gaining traction.



### **Mobile/Digital Integration**

Retailers are utilizing mobile apps to enhance loyalty programs, deliver personalized offers, and simplify checkout experiences. Meanwhile, in-store mobile device usage is growing as customers use their phones to compare prices, read reviews, and scan QR codes for product details.



### **Contactless and Cashless Payments**

With the growing popularity of digital wallets and tap-to-touch payment systems, consumers are increasingly embracing contactless payments. In response, retailers are upgrading their payment systems to enhance checkout speed and convenience.



### **Enhanced Store Analytics and AI**

Just as manufacturer Sales and RGM teams leverage AI to improve promotion efficiency, retailers are harnessing analytics, AI, and machine learning to optimize in-store operations. This includes employing predictive analytics to anticipate staffing requirements, analyzing foot traffic to gain insights into customer behavior, and refining store layouts based on movement patterns to create a more efficient and engaging shopping experience.

Retail execution is about responding to consumer expectations and technological innovations, and these trends reflect a shift toward convenience, personalization, and sustainability.

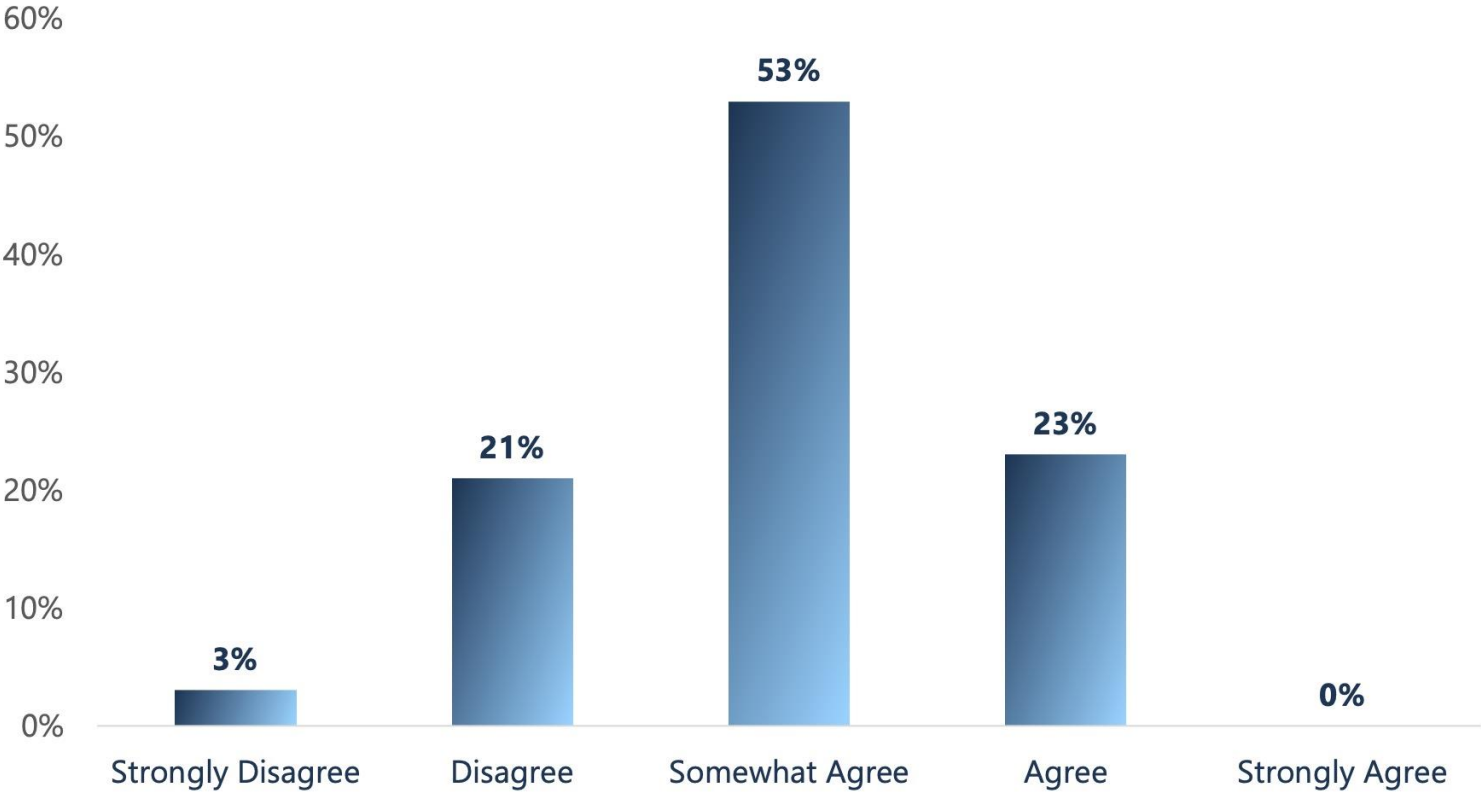
Manufacturers invest substantial time and resources in enterprise-wide planning, yet POI survey responses reveal that last-mile in-store execution remains a significant challenge and opportunity. According to the survey, **53%** of companies somewhat agree they are satisfied with their field sales teams' ability to execute at the store level, while **21%** disagree and are not satisfied with their impact. Additionally, **3%** of companies strongly disagree that field sales teams are able to execute effectively in stores.

Only **23%** of respondents believe their field sales teams have the capability to execute at the store level, with **no respondents strongly agreeing**. This highlights a critical opportunity for CPG manufacturers to enhance field execution, bridge the gap between planning and implementation, and boost retailer satisfaction at the point closest to the consumer.

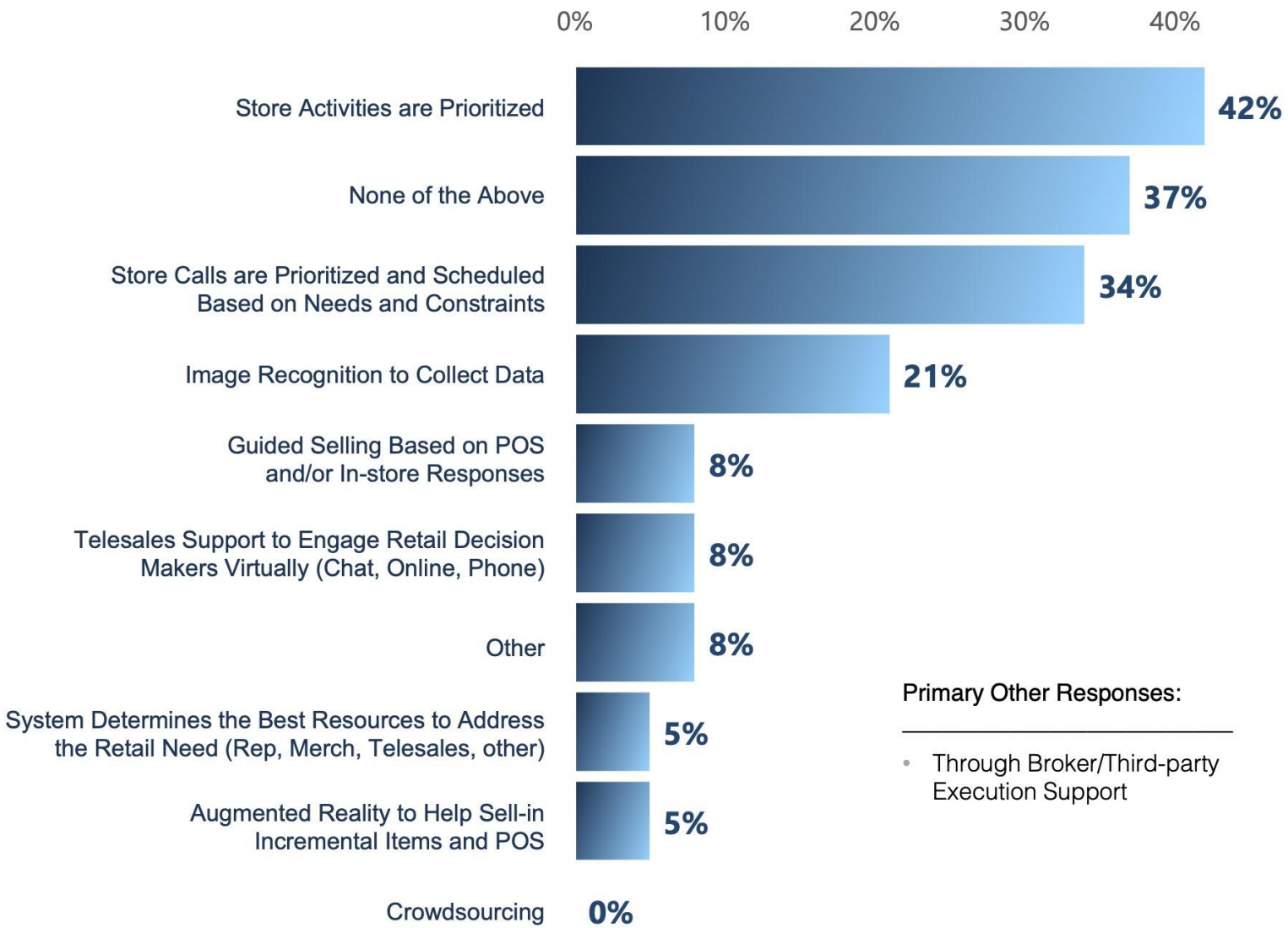
Common barriers to effective execution include misaligned strategies, insufficient training, and a lack of real-time data or tools. By investing in advanced technologies, such as AI-driven analytics and mobile field tools, and emphasizing skill development, manufacturers can empower sales teams to deliver on strategic goals.

As brick-and-mortar stores transform and prioritize efficiency for growth, excelling in execution across new innovations, pricing strategies, and effective promotions is more important than ever.

## Your company is satisfied with field Sales' ability to execute at store level...



# Your organization has the following capabilities to gain efficiencies in Retail Execution: (Select all that apply)



Primary Other Responses:

- Through Broker/Third-party Execution Support

According to POI’s survey, **42%** prioritize the sales representative’s store activities, and **34%** of companies prioritize and schedule retail execution calls based on needs and constraints.

The survey reflects solid growth in the use of Image Recognition (IR), with 21% of companies using Image Recognition (IR) technology. Implementing IR can significantly improve call efficiency and effectiveness. POI expects IR adoption to increase as manufacturers look to maximize execution results and call speed.

**Eight percent** of organizations use guided selling to standardize sales processes and lead reps through a prescribed call process.

Telesales gained momentum through the pandemic, and **8%** of companies use virtual calls to reach untapped retailers and markets.

Furthermore, **37%** of companies surveyed reported having no in-store retail execution capabilities (RetX). This lack of RetX can hinder an organization’s ability to achieve its goals and affect its growth.

Implementing RetX capabilities can help companies realize their plans and achieve more efficient and profitable growth.



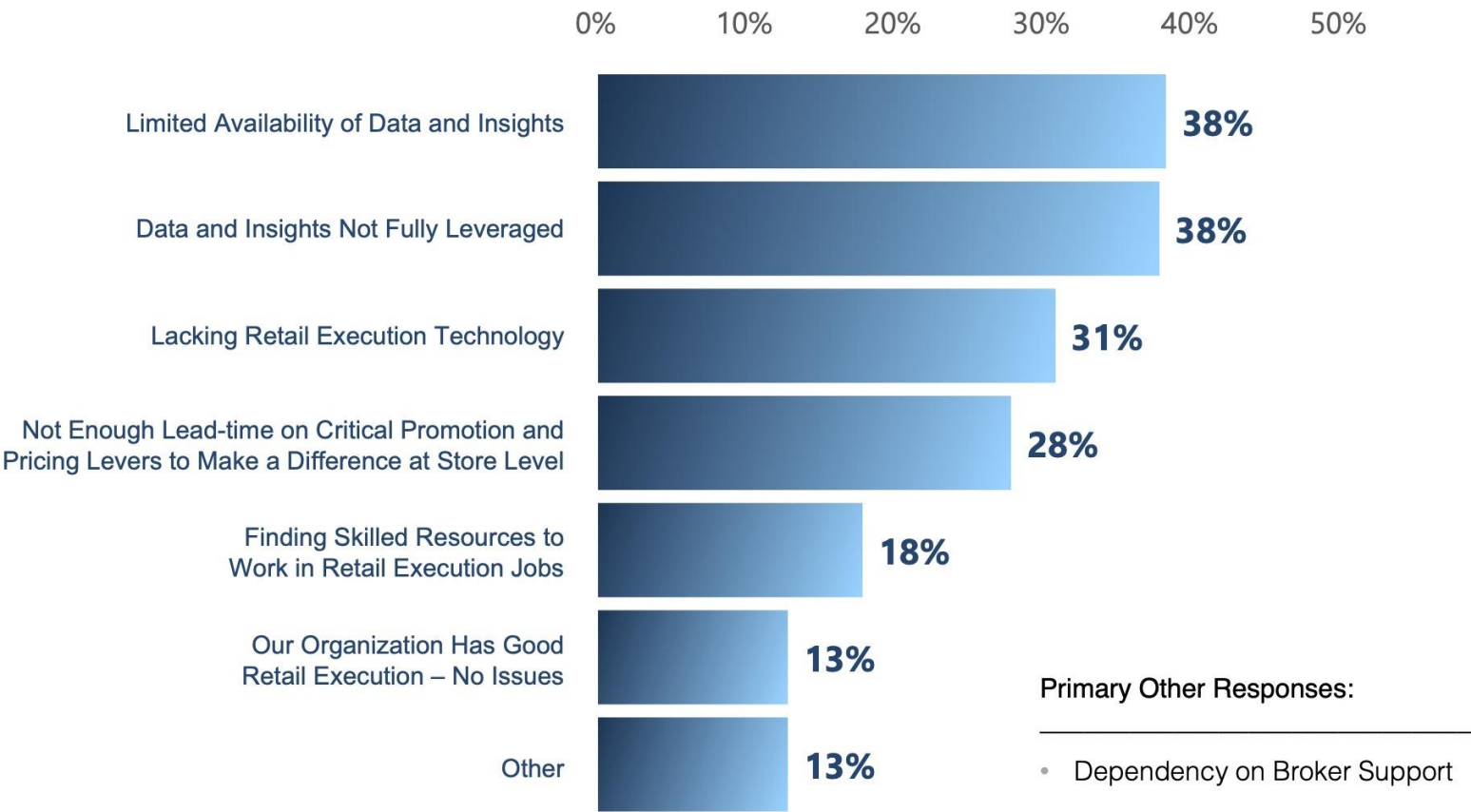
In today's competitive landscape, companies must leverage real-time data to anticipate shifting consumer behaviors and deliver tailored personalized experiences.

Sales representatives need dynamic tools to generate orders and provide in-store recommendations. Some use up-to-the-minute data regarding available inventory, optimal promotions, and current in-store conditions.

By seamlessly connecting headquarter partners, account managers, Revenue Growth Management (RGM) professionals, and retail execution (RetX) teams through automated data flows and execution capabilities, businesses can achieve greater visibility into the effectiveness of go-to-market strategies. This integration enables the continuous monitoring of executed plans, fostering a proactive approach to identifying and resolving any challenges or negative conditions.

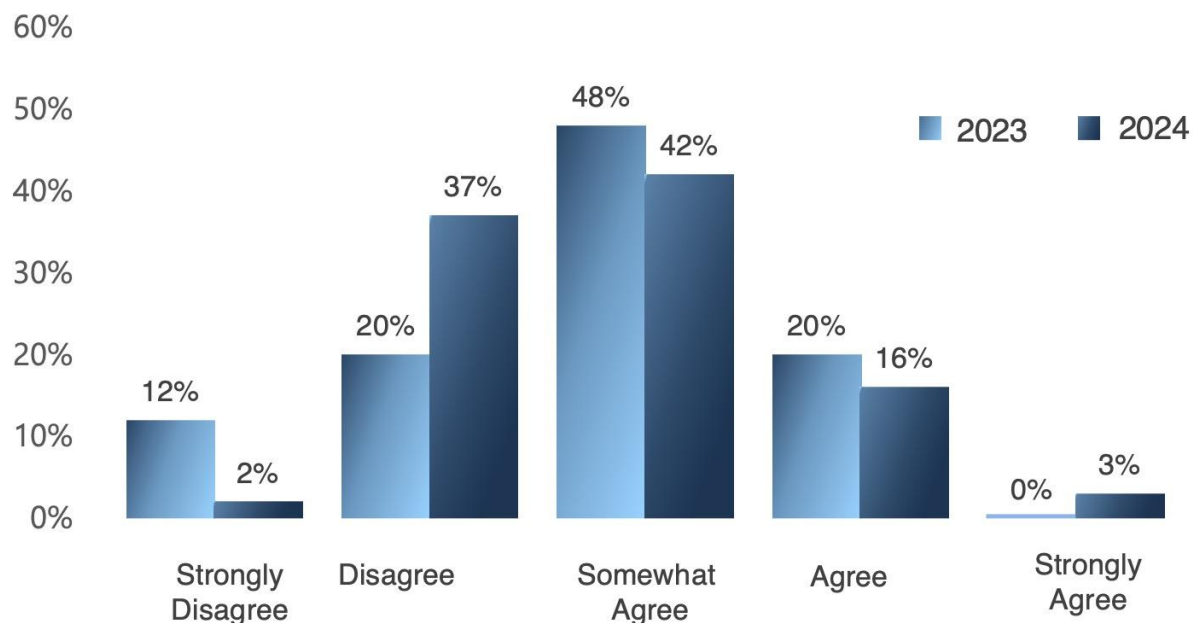
Ultimately, this holistic view empowers cross-functional teams to act swiftly and strategically, ensuring optimal performance and alignment across the organization.

# Top Issues Keeping Your Organization From Having Exceptional Retail Execution: (Select all that apply)



If your company is looking to advance RetX capabilities, please refer to the POI Vendor **Panorama**, [poinstitute.com](https://poinstitute.com), to dive deeper into the topic and understand current vendor capabilities.

## Your company struggles to get retailer-aligned promotions executed in-store...



**Promotion Planning and execution remain in a state of disruption as retailers and manufacturers determine and align on how to promote with inflation, cost increases, and changing consumer dynamics.**

### In-Store Execution of Planned Promotions

Manufacturers and retailers invest a significant amount of time and effort in planning and negotiating deals. However, successfully executing these plans is crucial for achieving the desired outcomes. When promotions that are aligned with retailers are not executed as planned at the store level, both parties fail to achieve the expected results.

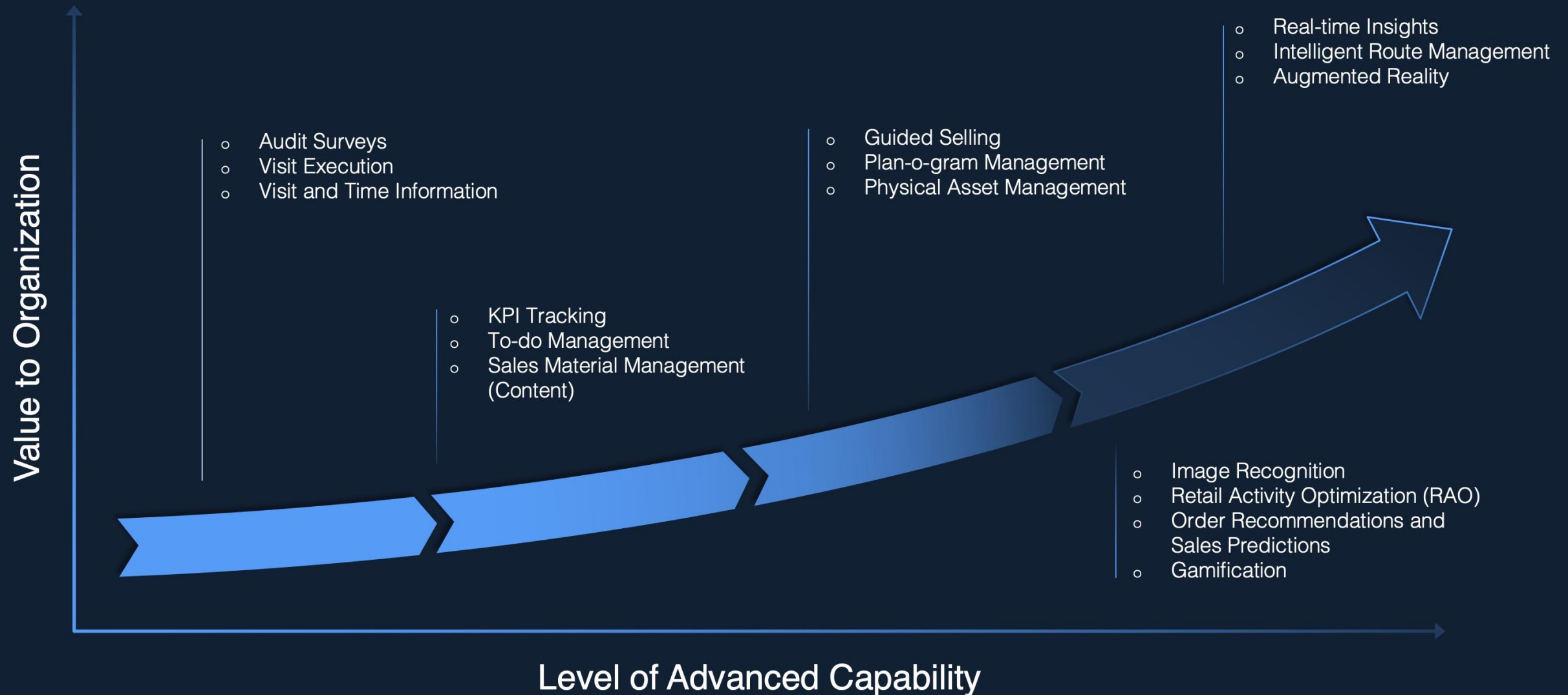
Research by POI suggests that companies still struggle with compliance and in-store execution. **61%** of the respondents agree that their companies face difficulties in executing promotions as planned. The gap between planning and execution has been a persistent issue in the CPG industry. Given the significant investments made in planning, it is imperative to focus on closing the execution gap.

According to POI's survey, only **5%** of companies have automated in-flight capabilities to monitor the execution of their plans and make necessary adjustments. Monitoring in-flight promotions is crucial for both manufacturers and retailers. It was found that **33%** of companies rely on sales ability to manage through reporting, while **21%** use manual communication to close the in-flight monitoring process. However, this takes a lot of time away from more strategic work and selling time. The most concerning observation was that **40%** of respondent teams do not execute any in-flight monitoring at all.

A wide-angle photograph of a vast ocean under a cloudy sky. In the foreground, white-capped waves are crashing against dark, jagged rocks. The water transitions from a deep blue in the distance to a lighter, turquoise hue near the shore. The overall scene conveys a sense of power and movement.

**Unlock Your Organization's Agility and Drive Growth  
by Advancing In-Store Execution for Greater Impact**

# In-store Capabilities That Advance Retail Execution



# Strategic Capabilities to Consider When Assessing Retail Sales Execution Needs



## Retail Activity Optimization and Guided Selling

are the way of the future of retail execution. These capabilities help field reps be effective in-store. Maximizing the value from the locations they visit and the activities they perform is a great way to drive revenue and execution. Guided selling, while related to Retail Activity Optimization, is a specific functionality for reps that sell and place orders based on ranking the opportunities by value and suggesting the next best action. Sales users are guided to the right product, discount or bundle, menu tie-in, and at what price. It also enables manufacturers to apply their unique sales process to the flow and expected outcomes of the sales call.



## Direct-to-Consumer (D2C)

D2C data can provide insights to enhance retail selling opportunities and operational efficiencies. For many categories, the main reason for D2C is the acquisition (and monetization) of first-party data to gain data-driven consumer insights. D2C strategies also benefit innovation & product development, enhance brand affinity & community, and provide business agility when marketplace conditions change. In 2025's evolving D2C landscape, establishing a revenue stream that prioritizes control over first-party data unlocks new opportunities to foster deeper consumer relationships, deliver highly personalized experiences, and strengthen brand loyalty across both digital and physical touchpoints.



## Artificial Intelligence (AI) & Machine Learning

are being increasingly used in the retail industry. Some of the emerging RetX capabilities utilizing AI include hybrid coverage models that prioritize the type of service, location, and activity (such as rep visit, merchandiser, broker, or virtual). AI can suggest distribution and general ordering and also provide recommendations for foodservice RetX, like menu and beverage suggestions. It can even use facial recognition to analyze decision-maker's sentiments during sales engagements. Additionally, self-service capabilities allow retailers to execute components of the retail call beyond placing an order. Finally, image recognition with augmented reality (AR) can be used to provide insights without having to take/process a picture. Artificial Intelligence can be used to improve back-office and in-store preparation, identification, and prioritization of sales opportunities. In the new reality, there are many instances where manufacturers and retailers are taking a hybrid "intelligent" sales approach to retail execution to manage labor and costs and gain a competitive advantage.



## Gamification

is a great way to motivate the enterprise. Successful retail execution requires a team effort, including marketing, sales planning, supply chain, and field sales teams. Gamification provides a means to generate a focus across the enterprise and have fun at work. POI sees this as an opportunity to leverage the vendor capabilities outlined in this report to connect the enterprise through meaningful KPIs in an engaging, competitive, and motivational way to drive continual improvement.



# What shelf intelligence capabilities is your organization likely to add in 2024/25?

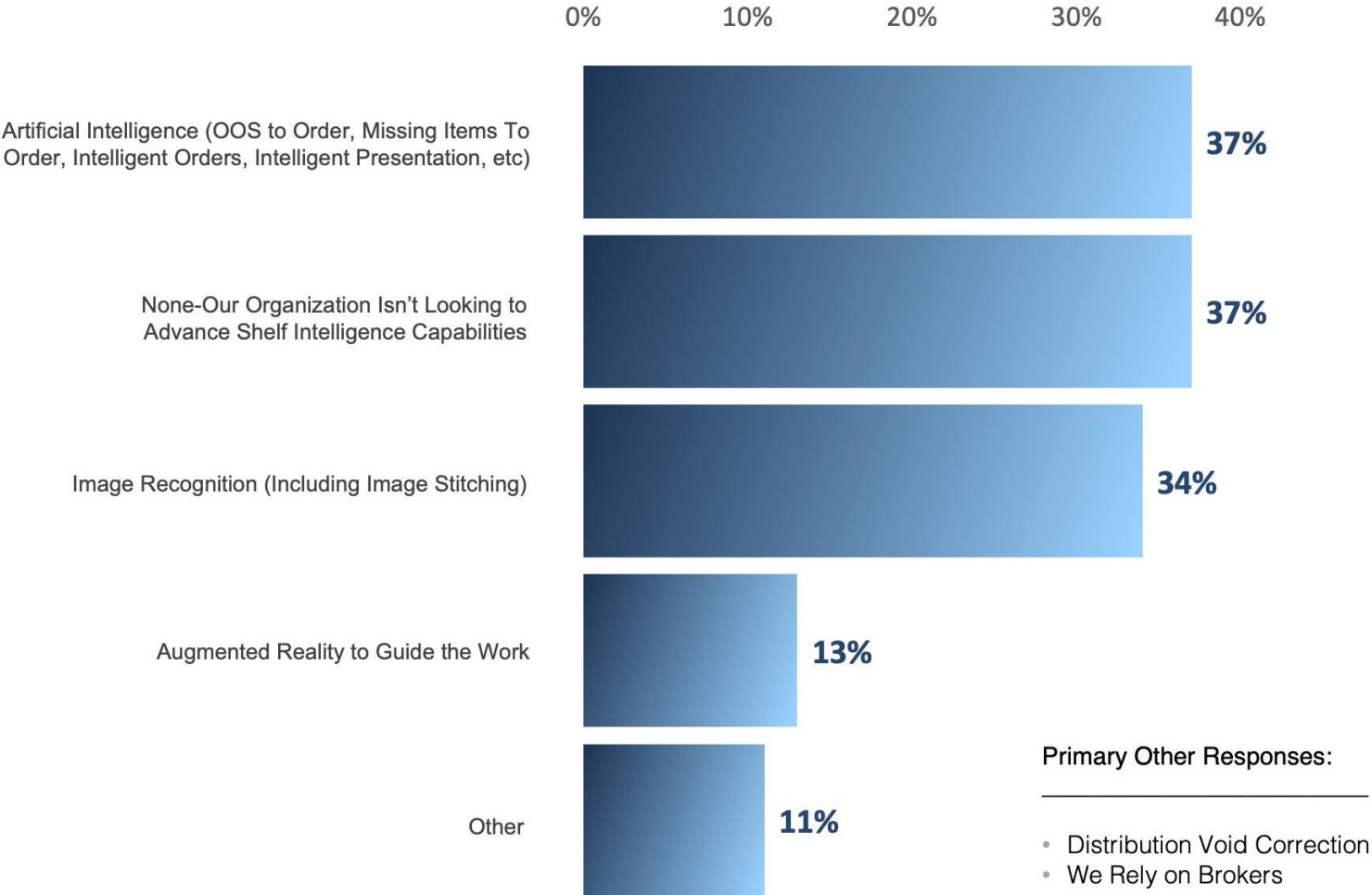
**Thirty-seven percent** of CPGs would like to add artificial intelligence capabilities to shelf intelligence, specifically in the areas of OOS to order, missing items to order, intelligent orders, and intelligent presentation capabilities.

**Thirty-four percent** would like to add image recognition capabilities to quickly identify gaps, and another **13%** would like to add augmented reality to better guide the work.

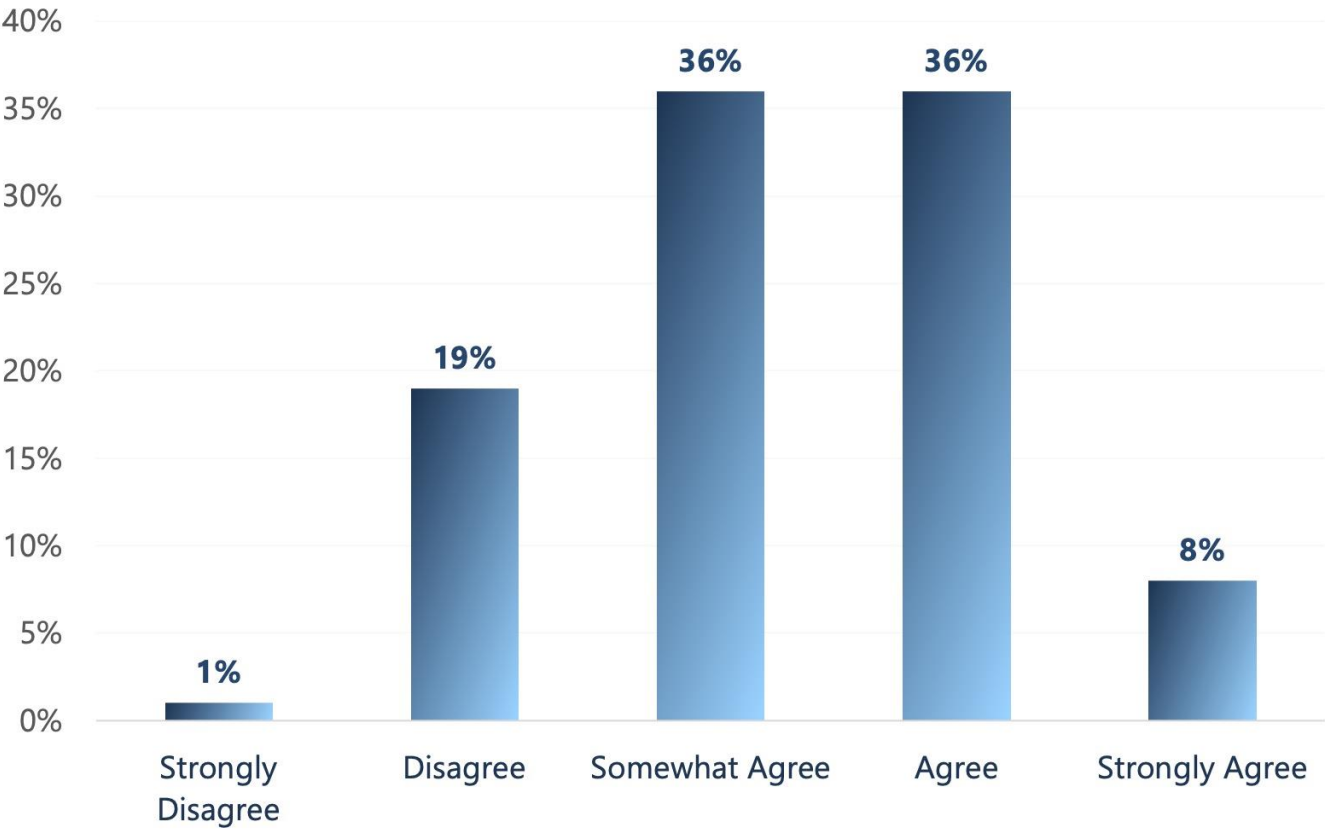
**Thirty-seven percent** of respondent organizations aren't looking to advance shelf intelligence capabilities.

Leveraging technology and AI in-store can improve the efficiency of the trip while also identifying and fixing key order needs, leading to sales increases.

Companies that embrace these capabilities will see improved volume growth.



# Your company has challenges moving retail execution user capabilities from being transactional to more analytical...



Retail execution sales teams in the CPG industry have long grappled with labor challenges, compounded by resistance to adopting advancing technology. Many experienced route specialists who deeply understand their routes, stores, and key decision-makers often perceive new tools as disruptive rather than beneficial.

It is crucial to position technology as an enabler designed to enhance their success rather than replace their expertise. Gamification and targeted incentives can play a pivotal role in addressing change management challenges and building trust in these solutions.

According to POI’s survey, **36%** of respondents somewhat agree that transitioning retail execution user capabilities from transactional to analytical poses challenges. Additionally, **43%** agree or strongly agree with these difficulties, while only **19%** report successfully shifting to analysis-based field execution. These insights highlight the urgency of equipping teams with user-friendly, data-driven tools and fostering a mindset shift to unlock the full potential of analytical retail execution.



### Why 2025 is the Year to Act:

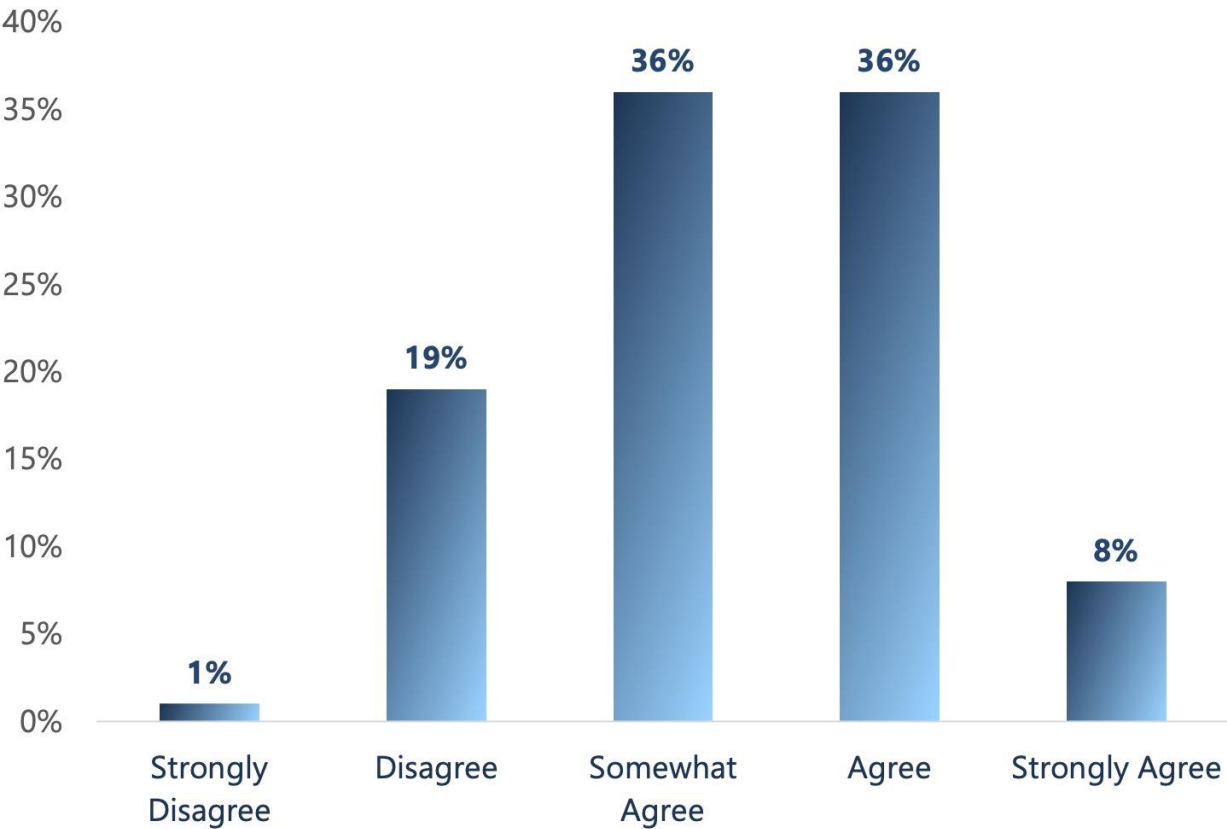
*Improving sales is a priority, and it's time to take action.*

Industry-leading retail execution vendors are equipping teams with game-changing tools and embedding artificial intelligence into key processes such as:

- **Image recognition** to streamline compliance checks and shelf analysis.
- **Retail activity optimization** to prioritize tasks and maximize call value.
- **Autogenerated suggested orders** to ensure shelves stay stocked with high-performing products.
- **Guided selling** to empower sales reps with tailored recommendations for every interaction. With these tools, companies can turn each in-store call into a strategic opportunity, driving measurable improvements in both efficiency and ROI.

It's time to move from consideration to action—2025 is your year to invest in smarter selling.

## Your Company's Retail Sales Execution ROI is bolstered by Sell More Capabilities.



**The strong agreement and widespread interest among respondents highlight a clear trend: businesses that invest in Sell More capabilities are poised to lead the way in retail sales execution.**

# POI RetX Survey Respondents Note There Are Execution, Analytical & Integration Opportunities:

RetX Solution Provides Office-Based Users the Ability to Make Analytical Decisions

17% agree

For organizations that own their RetX solutions, it is best practice to integrate them with your TPMx system to enable in-flight monitoring and vastly improve your company's ability to respond when promotions don't initially execute as expected.

The disconnect between Trade Promotion and Retail Execution systems is significantly limiting in-flight monitoring, execution visibility, and revenue growth.

42% agree

RetX and TPMx Solutions are Integrated. Changes in TPMx Promotions are Automatically Synced With the RetX Solution for Execution

RetX Solution has Sufficient Off-line Capabilities to Complete Complex Pricing Without a Server Connection

50% agree

In recent years, POI has seen heavy solution provider investment in offline capabilities.

# POI Retail Execution Recommendations

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Manufacturers and retailers have unprecedented access to consumer data, including preferences and buying habits. Leveraging this data can drive execution, create promotion bundles, and develop cross-category meal solutions that simplify shopping and enrich consumers' lives. POI envisions a new wave of retail execution—one that integrates digital insights with in-store experiences.

Today's consumers expect ongoing engagement with their favorite brands, both digitally and in physical stores. Connecting your brand's digital experience with personalized in-store interactions ensures stronger engagement. Whether it's through interactive videos or in-store tools like nutrition facts, gardening tips, or makeup shade finders, these touchpoints build brand loyalty and enhance the shopping experience.

For sales reps, innovative tools like image recognition, gamification, retail activity optimization, and guided selling can streamline tasks, motivate employees, and give organizations a competitive edge in a tight labor market.

Attracting top talent isn't just about wages—it's about creating a positive culture, providing excellent training, adopting advanced technology, and simplifying operations to boost efficiency. Focus on metrics and KPIs that align with your strategic goals. Use retail execution capabilities to monitor, track, and enhance brand performance with holistic visibility.

Globally, retail execution needs vary. Many leading CPG companies avoid a one-size-fits-all approach and instead tailor their software solutions to regional needs, often partnering with multiple vendors. To find the right fit for each market, consider costs, essential features, and localized support.

**The POI survey reflects that 58% of organizations don't connect retail execution systems with TPM/TPMx planning capabilities. This limits enterprise visibility to actual retail shelf conditions, in-flight monitoring, and promotion & shelf compliance.**



**Your Guide to  
Retail Execution  
Vendor Capabilities**

**Current and relevant  
insights to help you on  
your Retail Execution  
journey**

# Data Foundation & Management



# Data Foundation Enables:



**Omnichannel Data**



**Personalization**



**Advanced Modeling  
Behavioral Sensing; AI/ML**



**Advanced Analytics**

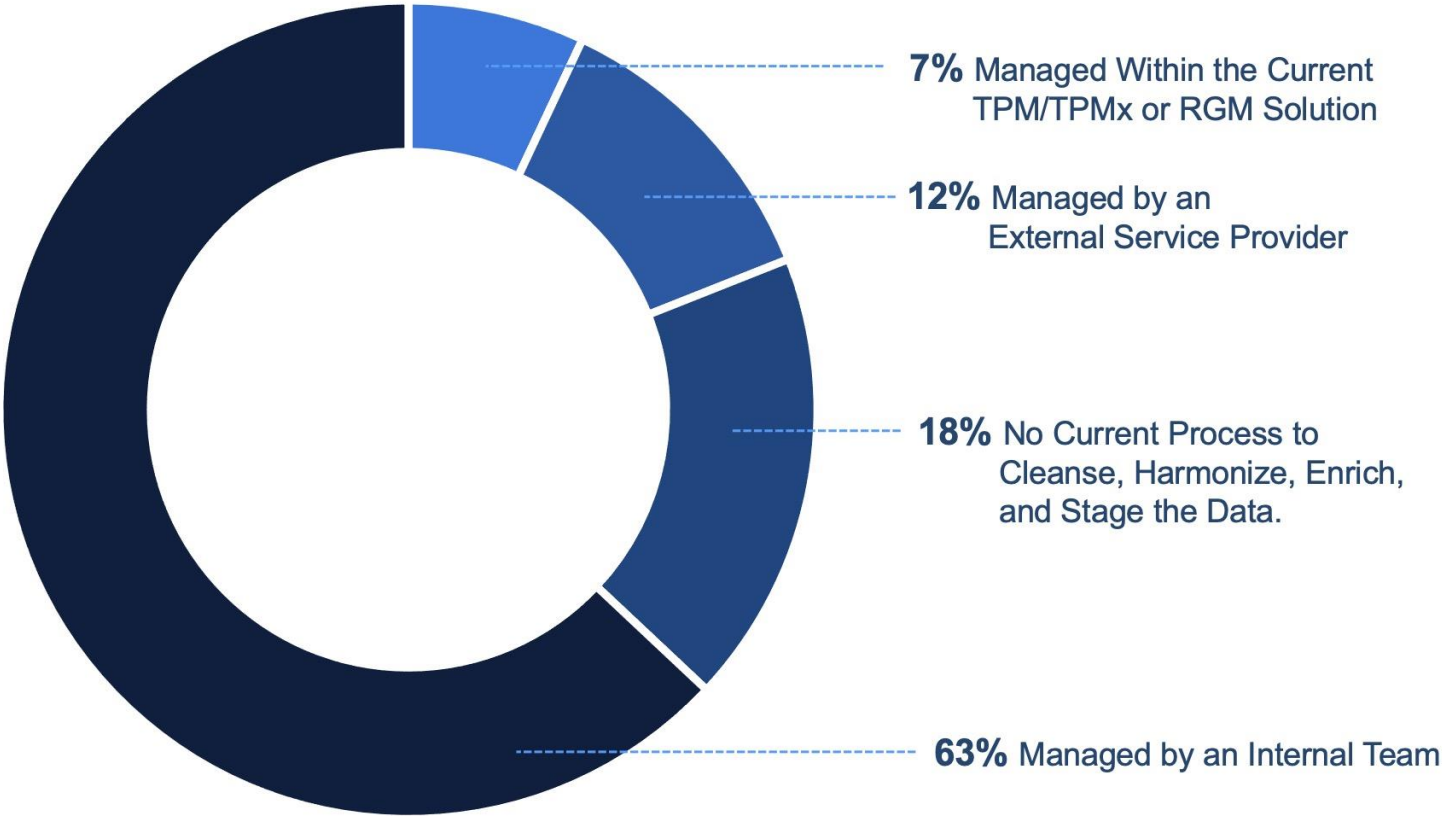
**Organizations today face the challenge of managing complex data, which presents both a challenge & an opportunity...**

High-quality data enables companies to make better strategic and operational decisions and helps them respond quickly to market changes and consumer demand. Data-driven insights allow companies to better understand consumer behavior, leading to more effective marketing and product development strategies. Companies that embrace a strong data foundation will leapfrog those who hesitate. It is important that business functions are engaged in developing data strategy and ownership of the data; it isn't just an I.T. exercise.

Institutionalizing data is not a one-time project but rather a continuous journey. Artificial intelligence and automated capabilities and processes can help reduce the effort required in an organization, but they require strong leadership and oversight to embed into an organization. With privacy and data protection laws, this will become essential.



How is your company currently handling cleansing, harmonizing, enriching, and staging the data so it can be used in Enterprise Planning (TPMx, RGM, etc.)?



**Sixty-three percent of CPGs are internally managing data**, but there is an opportunity to automate and make the work more efficient by leveraging AI as technology evolves. This still requires business oversight and industry expertise to ensure high-quality data.

**Eighteen percent of CPGs still struggle to manage this process** which will continue to be a barrier to quick insights and business decisions.

# Meeting Consumer, Retailer, & Organizational Needs Through Data & Insights



The digital revolution increased data availability, but accessing store-level data, maintaining data quality, and analyzing data is challenging. Teams struggle to generate timely insights. The goal is to fully utilize data for insights and action, not just to “have” data.



Historical CPG data sources, with up to a month delay in timing, can't proactively support the portfolio, channel, and retailer pricing decisions needed to maximize total enterprise strategic priorities and revenue growth. Data needs to reflect what is happening with the brand...at retail...in the moment.



Collaboration and innovation with our retail partners will be the key to maintaining the strength of brick-and-mortar retailers amidst the ongoing dynamic changes. With changes in consumer purchasing behavior, it is vital to extract insights and understand the reasons behind them through data analytics.

## Data is foundational to retailer partnerships and realizing mutually profitable growth.

The good news is that a few leading enterprise planning solution providers have advanced analytic technologies on the market that enable robust analytics insights in real time.

Manufacturers can provide better insights to their retail partners when they have access to store-level data. It is important to use AI capabilities to analyze this complex data, which can provide automated insights and eliminate the burden of manual analysis.

When manufacturers were asked if they have challenges with retailers freely sharing foundational data (POS, Daily, Shopper, etc.) with them **67%** agree that they have challenges obtaining data.

While these data sources are essential for analysis, **60%** of companies face data quality anomalies and issues with external sources. If left unaddressed, these issues can result in inaccurate analyses and flawed outcomes.

**The goal for organizations is to have data-driven intelligence and insights based on “one version of the truth.”**

# First-Party Retail Data, Personalization, and Insights...

Consumer goods companies must optimize their trade dollars across both traditional retail and digital channels. Retailers and manufacturers are struggling to achieve volume and profit growth in the ever-changing omnichannel landscape. We are seeing the lines between trade and media investments increasingly blur. With siloed organizations each managing their own “bucket of investment,” it becomes more difficult to drive cohesive growth.

Retailers and manufacturers are continuously experimenting with both in-store and online strategies, and POI is excited to see the evolution of holistic measurement across these investment areas.

POI predicts that retail partners and manufacturers will continue testing different retail levers to identify the most effective strategies for connecting with consumers, increasing market share, and driving essential growth. Companies that foster strong collaboration between sales and marketing will realize more efficient overall investment.

**Automated prescriptive capabilities that offer personalized recommendations can be a competitive advantage as teams can quickly scale consumer analysis and next best actions.**

**As history has shown, having high-quality data is excellent, but unless the data is harnessed and insights can be quickly gleaned, nothing is gained for the effort and investment.**

**With the growing restrictions on third-party cookies and the increasing demand for personalized, targeted consumer offers, leveraging first-party data will be essential.**

Manufacturers can gain valuable insights into consumer behavior by obtaining data on how, when, and why consumers purchase their products. This information can help manufacturers determine what innovative products to create and how to price and distribute them to meet consumer needs.

Retailers can also benefit from providing or selling first-party consumer data. This can create a new revenue stream and help their manufacturer partners deliver better recommendations that benefit everyone involved.

# Implications for Marketing With Elimination of 3<sup>rd</sup> Party Cookies

## Advertising and Marketing Challenges

- Without third-party cookies, targeting specific consumer segments becomes more challenging.
- This could reduce the effectiveness of ad campaigns and increase the cost of acquiring customer data.

## Customer Insights and Analytics

- Limitations in tracking consumer behavior across different websites.
- This impacts our ability to offer personalized experiences based on detailed behavioral data.

## Privacy and Compliance

- There's a greater emphasis on collecting first-party data directly from customers.
- Invest to ensure compliance with data privacy regulations like GDPR and CCPA.

## So... What Can Be Done?



### Contextual and First-Party

Advertisers will need to pivot towards strategies that leverage first-party data and contextual advertising rather than relying on third-party tracking.



### Investing in Privacy-Compliant Solutions

Brands must invest in tools and technologies to comply with privacy regulations and effectively gather and analyze first-party data.



### Enhanced Focus on User Engagement

Build direct relationships with customers through loyalty programs, subscriptions, and personalized experiences is increasingly important.

# Digital Transformation



# Digital Transformation

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Digital transformation powers a seamless omnichannel shopping experience, offering 24/7 global access to products and brands with cutting-edge technologies for personalized, immersive virtual shopping.

Advanced analytics and AI models enhance decision-making, enabling quick adaptation to consumer behavior and market shifts.

Unified consumer profiles drive social selling and superior service across the enterprise while emerging capabilities like AI/ML, extended reality, touchless interactions, and robotics/chatbots lay the foundation for scalable, personalized digital experiences.





## Digital Marketing Progress

In previous years, POI's State of the Industry findings reflected that many companies believe they are behind their peers in the area of digital marketing efforts.

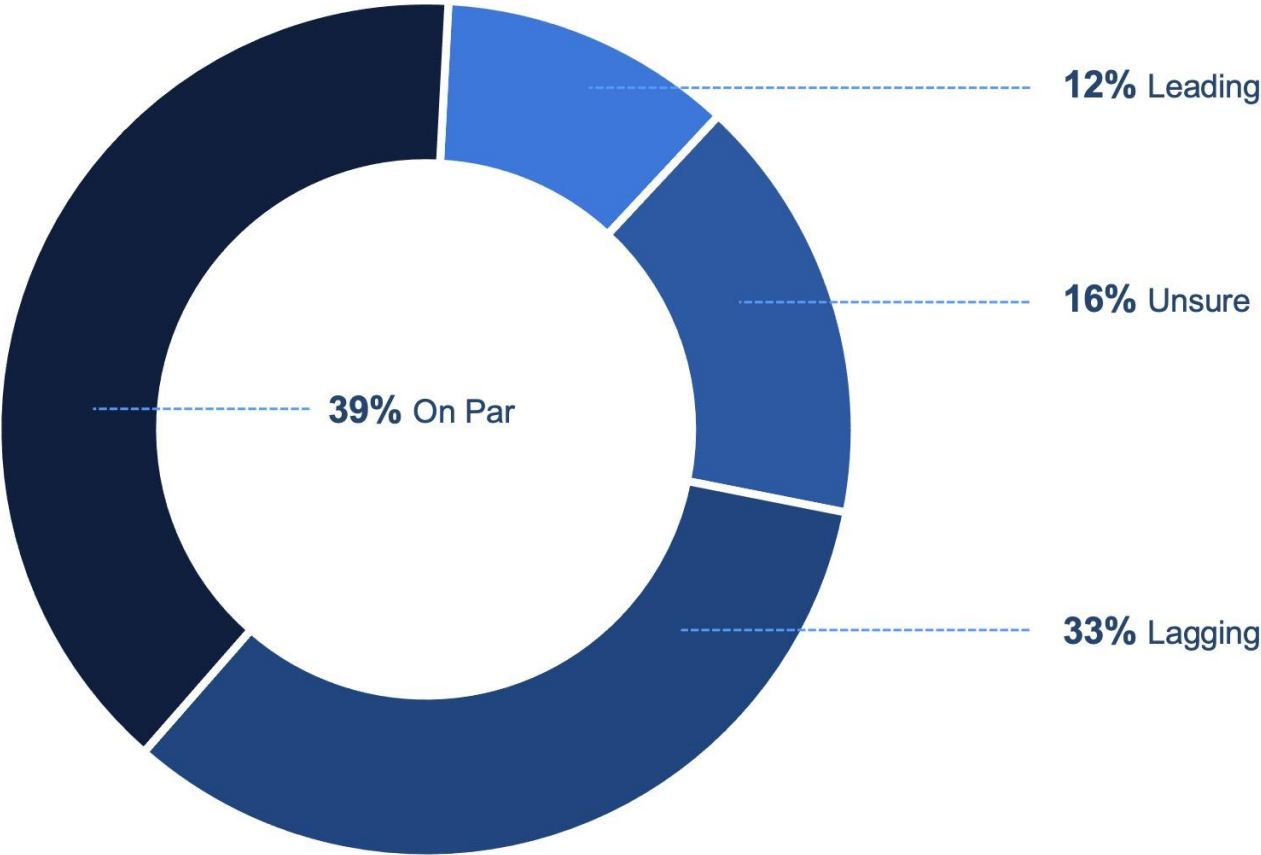
As we head into 2025, **33%** of survey respondents noted a "lagging" response around their digital marketing efforts.

**Thirty-nine percent** of respondents noted they are on par with peer-set digital marketing efforts.

Meanwhile, **12%** of respondents stated they are leading digital efforts in the CPG industry.

**Sixteen percent** are unsure. Organizations must break down silos and strengthen cross-functional partnerships, as digital marketing impacts nearly every internal business unit.

## Do you feel your company's digital marketing efforts are on par with the market and your peer set?



Respondents note the following aspects are necessary to take their digital practice to the next level:

A digital practice starts with gaining the necessary digital budgets (61%). Visibility across departments is also important (56%).

As digital practices build, 35% of respondents note a need for a dedicated digital team, and 30% reflect a need for dedicated analysts.

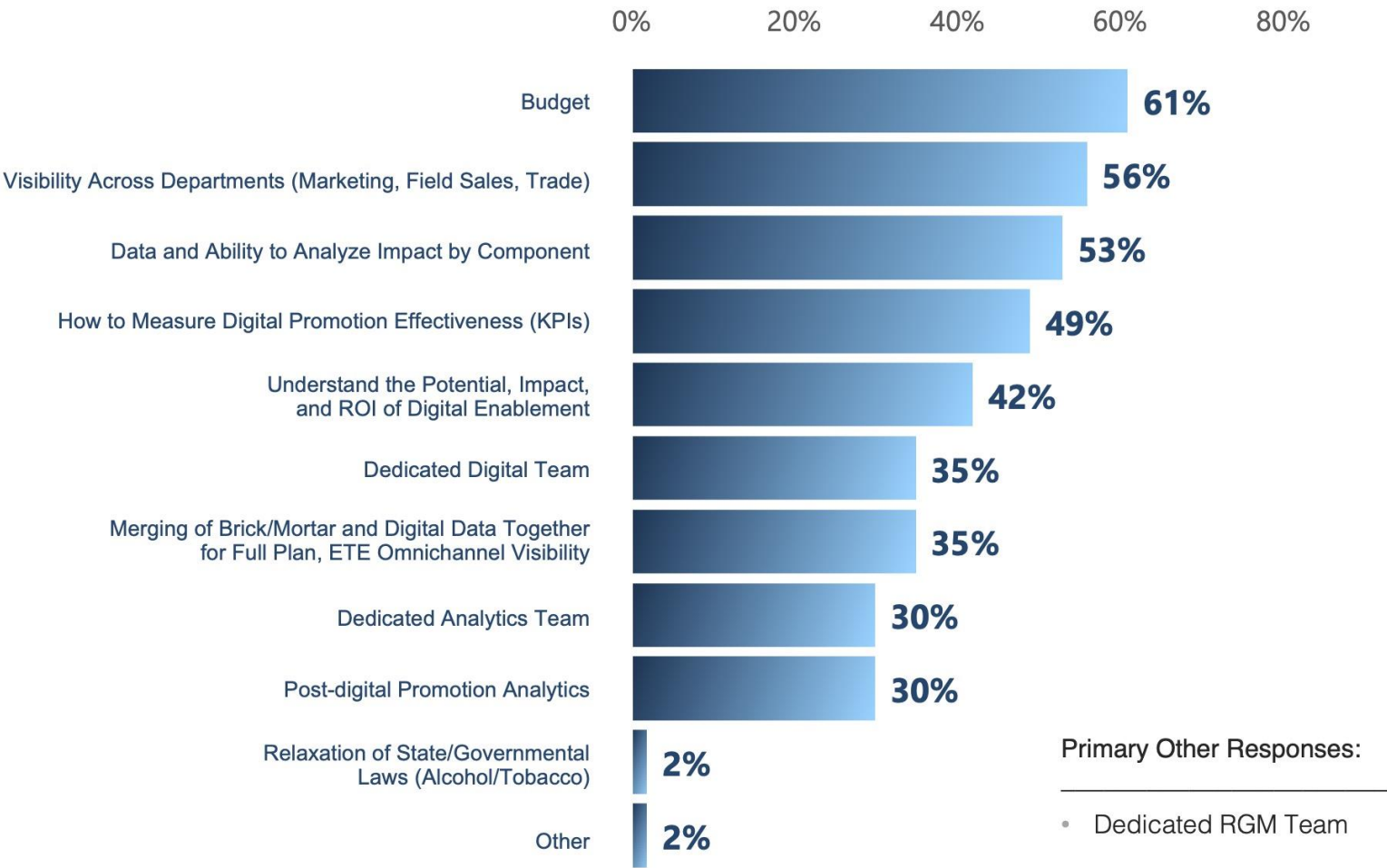
The team needs digital ROI evaluation capabilities to understand the potential impact and ROI of digital enablement (42%).

These teams are determining how to measure the best digital program effectiveness/KPIs (49%). In conjunction, they determine data availability and analyze the impact by component (53%).

Thirty-five percent of respondents note that merging brick-and-mortar and digital data for the full plan and end-to-end omnichannel visibility is critical to understanding where to invest the next dollar. Yet, most companies don't have the capabilities to do so at this time.

POI sees this merger of data and visibility as critical to advancing enterprise profitability and strategy.

How does your organization need to advance its digital promotion capabilities? (Select all that apply)



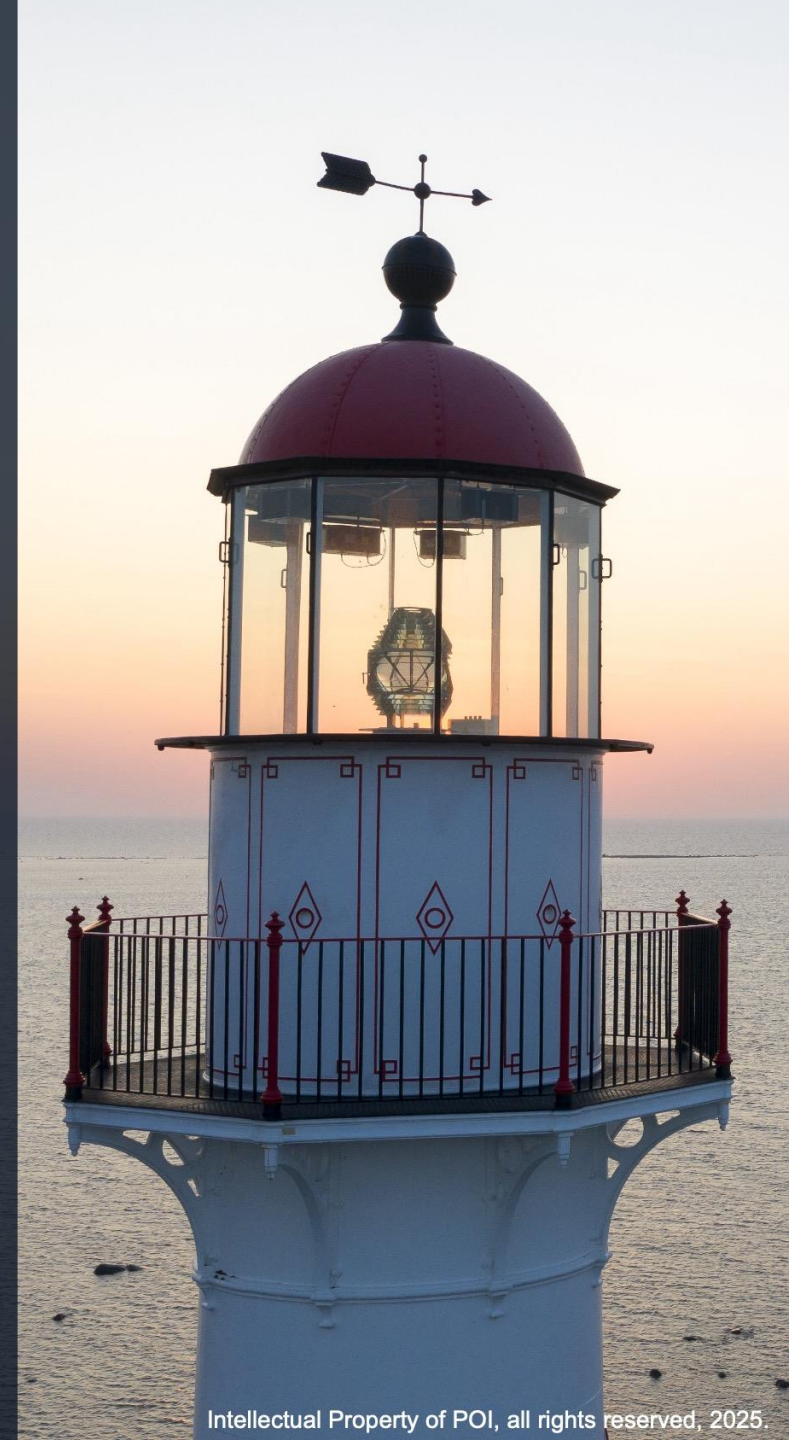
The industry's digital transformation is driving the need for consumer behavior modeling, advanced analytical capabilities like AI/ML, BOTS, etc., plus new or upskilled roles to manage the new capabilities.

## When respondents were asked: How would you characterize your current linkage between digital promotions and traditional trade promotions?

According to POI's survey, **17% of companies reported that they do not have any connection between digital and trade promotions.** While some teams have limited visibility and coordination, it is noteworthy that **only 30%** work in a coordinated manner. This is due to the traditional organizational structure of working in silos.

**For optimal performance, traditional trade promotion and digital promotion teams must be more linked.** Each group analyzes, creates, and executes programs they deem the best fit for the brands, which can lead to duplication of efforts. This results in wasted spending and missed opportunities to amplify plans across the omnichannel landscape. Incrementality measurement is evolving in the industry, which can help drive visibility and partnership around holistic digital and trade fund planning.

**Organizations must enhance visibility and collaboration between digital and trade promotion teams.**



# Omnichannel

A Balanced Approach for Growth



# Omnichannel

## A Balanced Approach for Growth

Retailers and manufacturers alike need an omnichannel strategy. While a balanced approach is ideal, the specific strategy should align with the product category. As organizations expand their presence across multiple channels, they must prioritize delivering a seamless and frictionless customer experience

What is concerning is that **76%** of CPG companies don't have an omnichannel strategy.

Also, most companies establish eCommerce initiatives but do not necessarily have an omnichannel strategy. POI recommends that you set a holistic omnichannel strategy along with a 3–5 year roadmap so that your organization is well-positioned for growth and has a clear strategic plan in place.

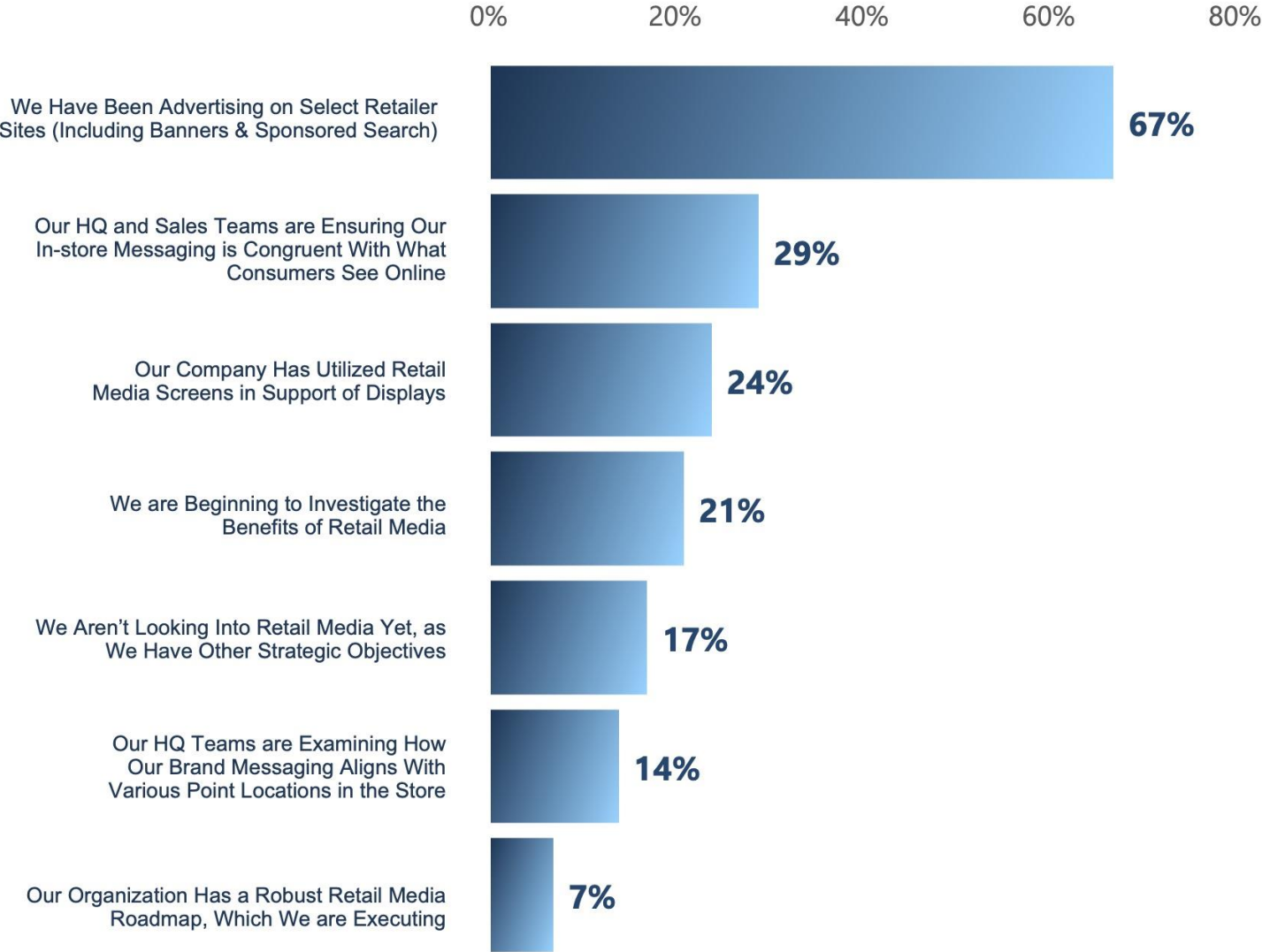
As a company's omnichannel business grows, the complexity of pricing and promotions increases, demanding greater oversight. To address omnichannel requirements, organizations must enable capabilities such as pricing and promotion management, product mix and channel optimization, go-to-market strategies, RGM oversight, and Master Data Management (MDM) content repositories. These capabilities enhance agility and vigilance, ensuring operations remain aligned with overarching organizational objectives.



# Retail Media



# How is your company navigating the new, complex, and transformative retail media landscape? (Select all that apply)



Navigating the evolving marketing landscape has been complicated for CPGs. Knowing where to spend the next dollar best is a question routinely asked by leadership. The push for more investment in retail media has left CPGs wondering how to allocate customer funds across in-store, digital, and shopper channels.

**Sixty-seven percent** of survey respondents noted investments on retailer sites, including sponsored search and banner ads.

**Twenty-nine percent** of respondents have HQ and sales teams working on in-store and online messaging consistency, and another **14%** are working on aligning brand messaging within the store.

In-store retail media is gaining significant attention, with numerous solutions emerging to deliver messaging at the point of purchase. Currently, **24%** of respondents are utilizing retail media to influence shopper behavior.

**Thirty-eight percent** of respondents are lagging in adopting retail media. Of these, **21%** are still in the early stages of exploring retail media, while **17%** have opted not to pursue it. As funds shift from traditional media to retail media, this represents a potential missed opportunity.

According to an EMARKETER forecast, US omnichannel retail media ad spending totaled \$54.85 billion in 2024, a growth of 26% YoY. **43%** of respondents believe that they can increase brand exposure and generate incremental purchases through retail media.

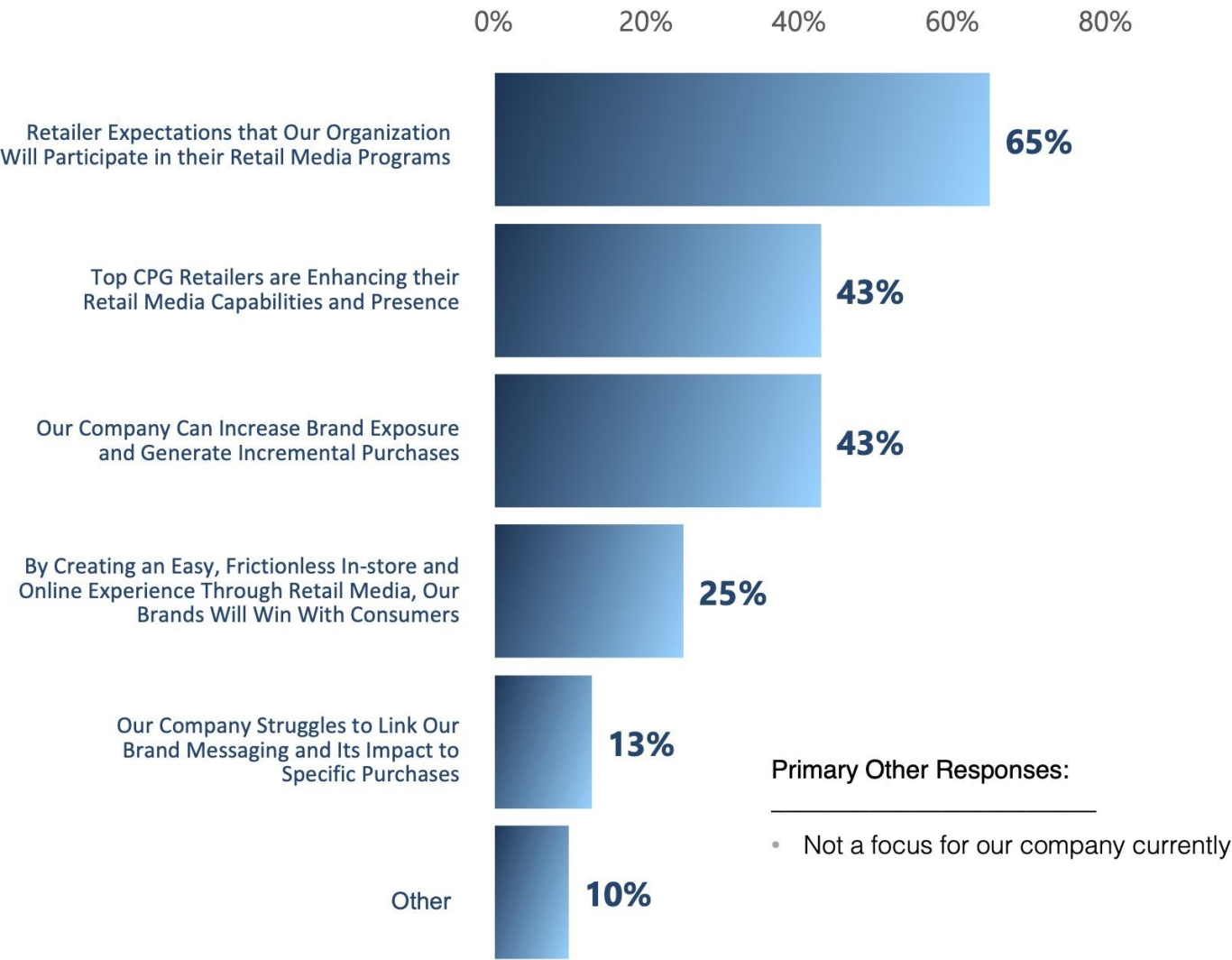
Most retail media spending is online, but a notable \$370 million comes from in-store. Retail media growth is due to retail eCommerce, digital advertising, and an increase in connected TV (CTV) advertising.

Vendors are emerging with solutions and digital in-store advertising opportunities to get closer to the point of purchase to enhance measurement quantification. As the in-store retail media space evolves, it is important for CPGs to develop both online and in-store retail media strategies as a fundamental part of enterprise planning.

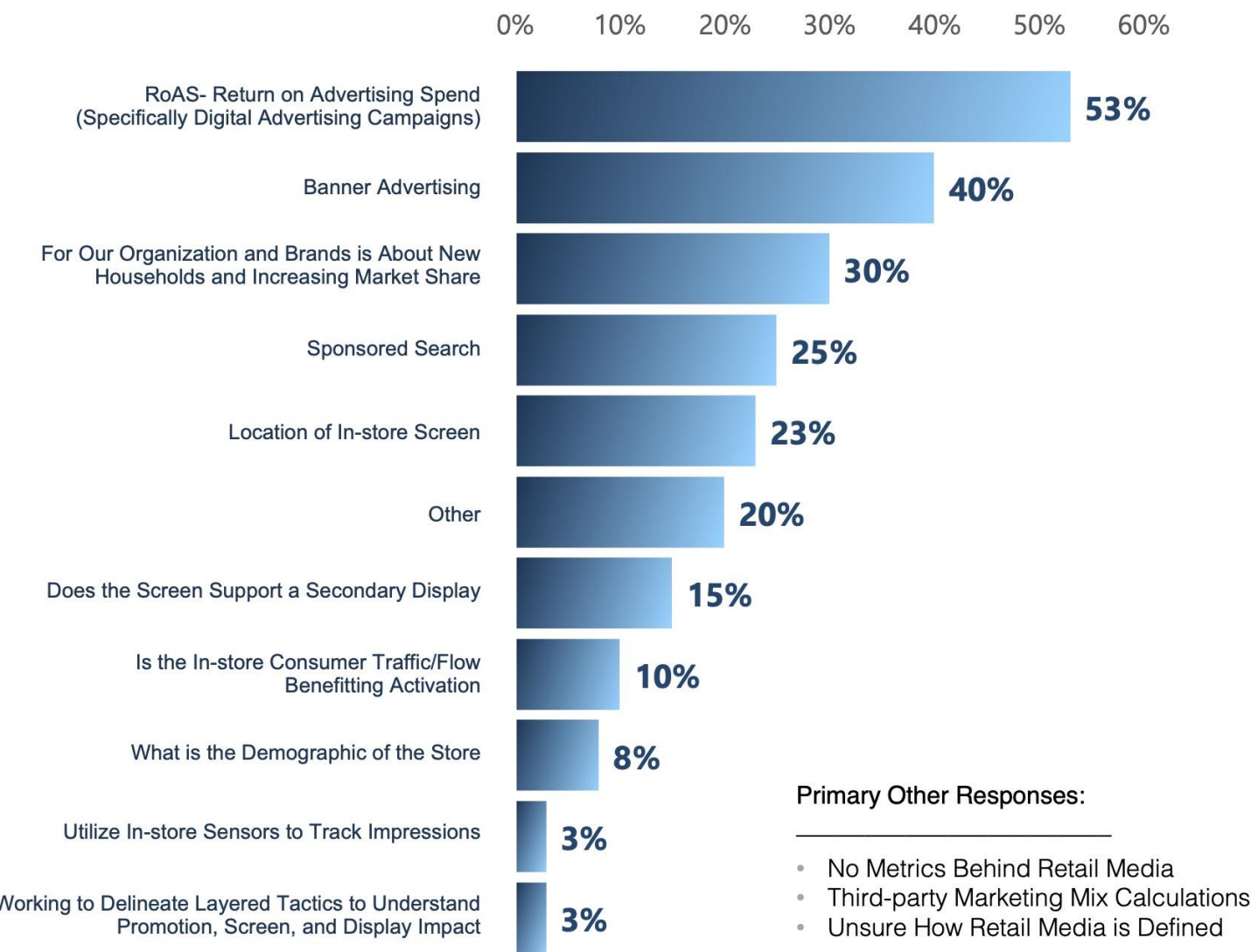
Currently, **65%** of respondents invest in retail media because retailers require it, while **43%** do so to align with retailer strategies.

As retail media measurement evolves and demonstrates the actual incremental impact on sales, additional investments will shift toward retail media, making it feel less like a mandate.

# What key reasons shape your company's retail media focus? (Select all that apply)



# What key metrics does your organization use to quantify the impact of in-store retail media activations? (Select all that apply)



In-store retail media opportunities are rapidly expanding, with digital ads now appearing on everything from endcap aisle displays and cooler doors to shopping carts and gas pumps. Many retail media networks and media companies have advocated for standardization across these networks.

While full retail media standardization may still be some time away, expect more organizations to address its urgency and propose frameworks. Recently, the Interactive Advertising Bureau (IAB) introduced definitions and measurement standards for digital screens, printed/static media, audio, connected shopping, and experiential marketing.

Survey respondents are using ROAS (53%), new households & increased market share (30%), and the location of in-store screens (23%) as key success metrics. However, the ultimate goal of measurement remains true sales and profit incrementality, and new companies are emerging that claim to deliver on this promise.

While some organizations track metrics, many are also validating tactical activations like banner advertising (40%) and sponsored search (25%) to begin measuring media activations.

Retail media should be a shared responsibility among sales, marketing, and digital teams, who should collaborate to ensure that all campaign goals are successfully achieved.

## Enhancing Retail Media With AI Capabilities

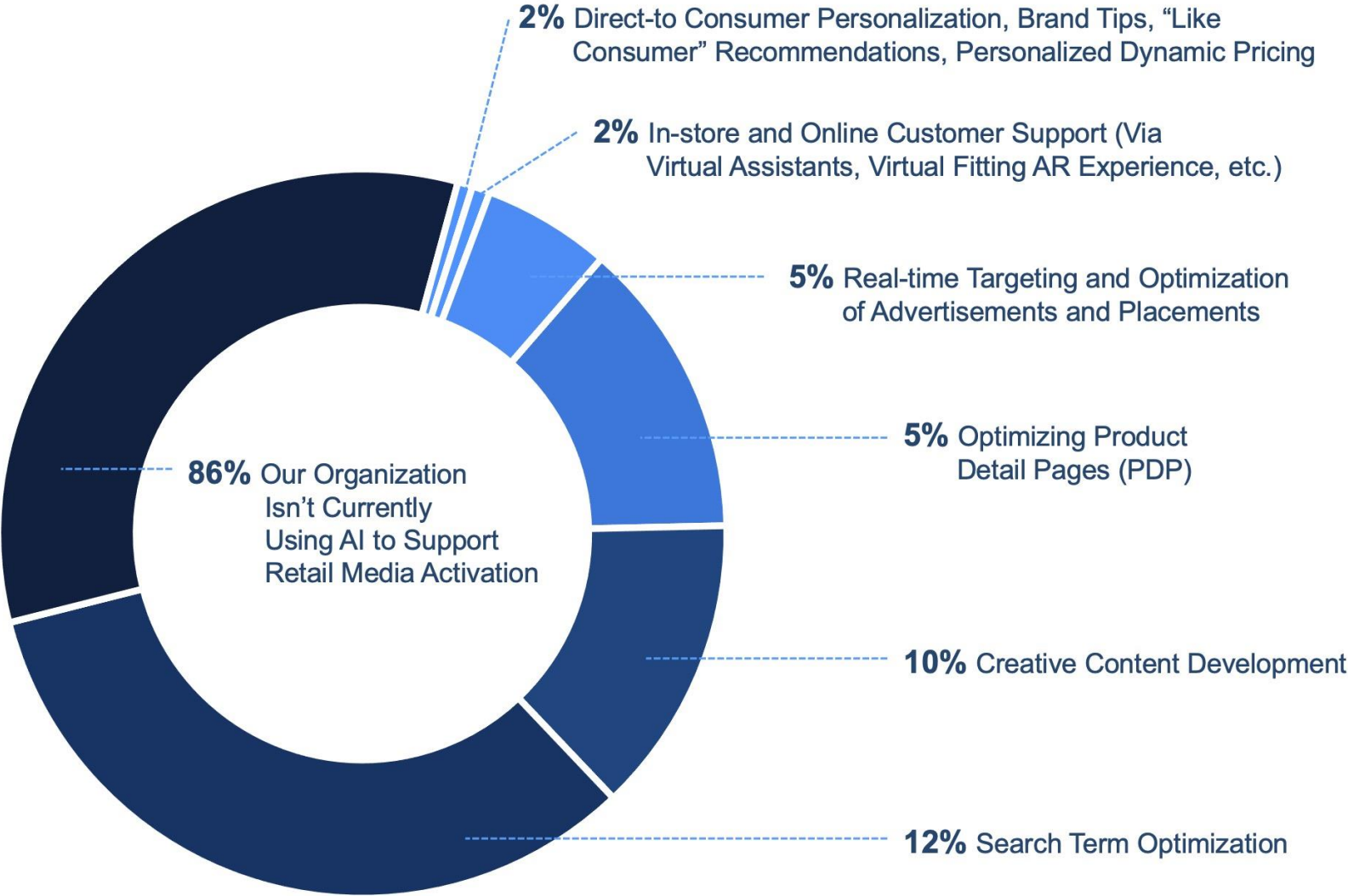
AI is an increasingly important feature for retail media networks, helping accelerate ad targeting and developing creativity.

**Eighty-four percent** of respondents indicated that their organizations are not currently leveraging AI to support retail media activation. As the number of retail media networks grows and campaign complexity increases, AI will play a crucial role in enabling faster, more efficient decision-making and optimizing plans.

CPG manufacturers should reflect on how retailers are leveraging AI. Both Amazon and Walmart have rolled out generative AI-powered search enhancements, setting a trend that other platforms are likely to follow.

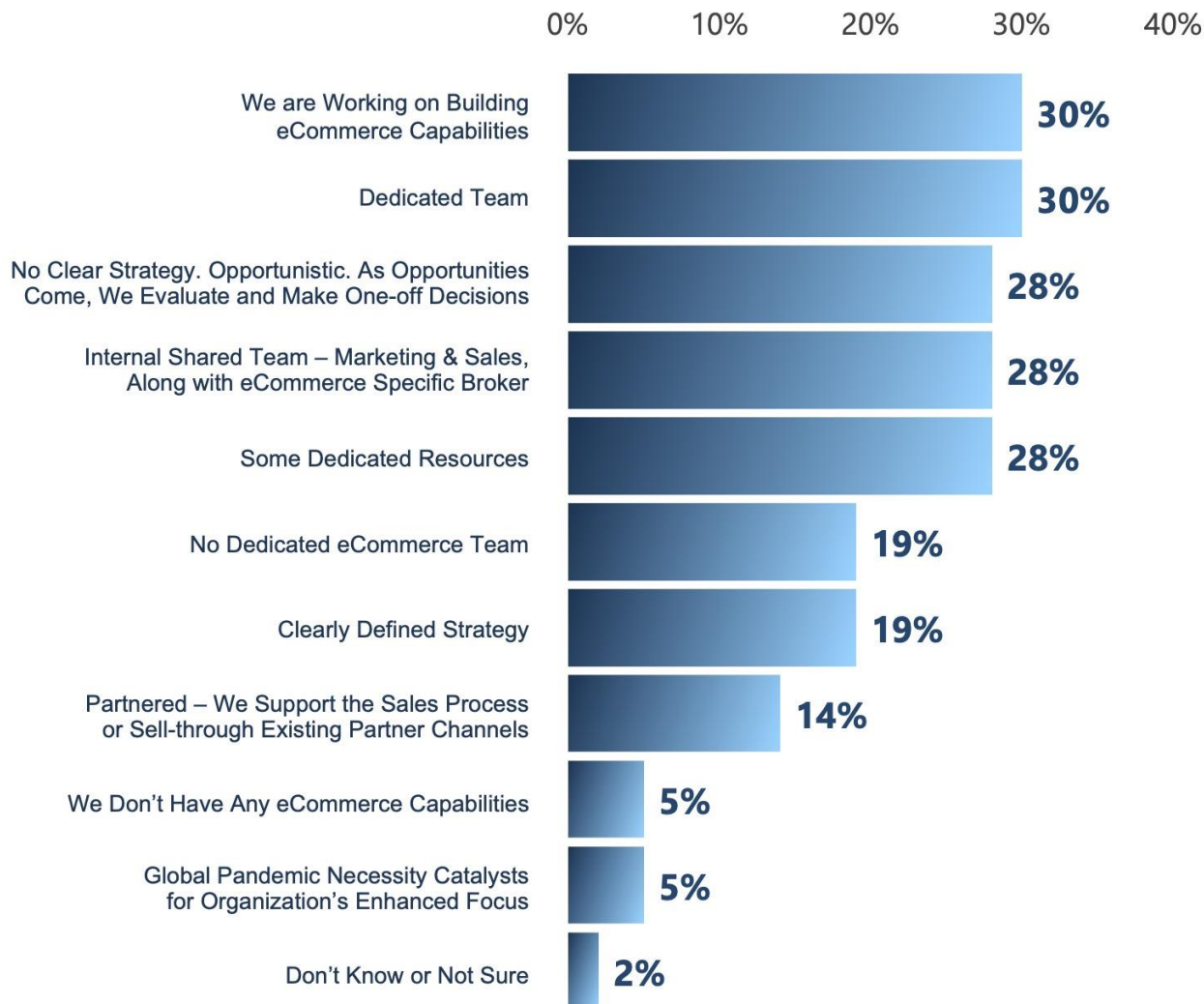
Chatbots have the potential to personalize the shopping experience. CPGs with direct-to-consumer websites should explore leveraging direct consumer data and generative AI to enhance the shopping experience.

## How is your organization using AI to support your Retail Media activation? (Select all that apply)



# Ecommerce

## How would you describe your current eCommerce capabilities? (Select all that apply)



Relevant consumer data forms the foundation for understanding customer needs and determining how innovation, pricing, promotions, product bundles, channel differentiation, and new store formats can drive online and in-store growth. However, acquiring accurate and granular eCommerce data remains a challenge, leading to difficulties and hesitation in omnichannel planning

According to the POI survey, when companies describe their organization's current eCommerce capabilities, **30%** are actively working on building ecommerce capabilities, and **30%** have a dedicated team to support the channel. **28%** utilize internal shared teams including marketing, sales, and an eCommerce specific broker. A separate **28%** have some dedicated resources for eCommerce, while **19%** don't have a dedicated eCommerce team. Another **14%** of companies consider themselves partnered, supporting the sales process and/or selling through existing partner channels.

**19%** of companies have a clearly defined strategy, while a quarter of respondents (**28%**) indicated they are opportunistic and don't have a clear strategy or a dedicated eCommerce team to manage the workload. This approach may be due to the challenges faced by these teams. **5%** of companies indicated they don't have capabilities. As companies explore channel expansion opportunities in emerging markets, channel conflict remains a concern that impacts enterprise decision-making.

In-store services are key to drawing the consumer within the traditional four walls. Yet, the "experience" needs to be inspirational for the consumer to take the time to enter the brick-and-mortar door. Entering the store is a value/time decision for the consumer.

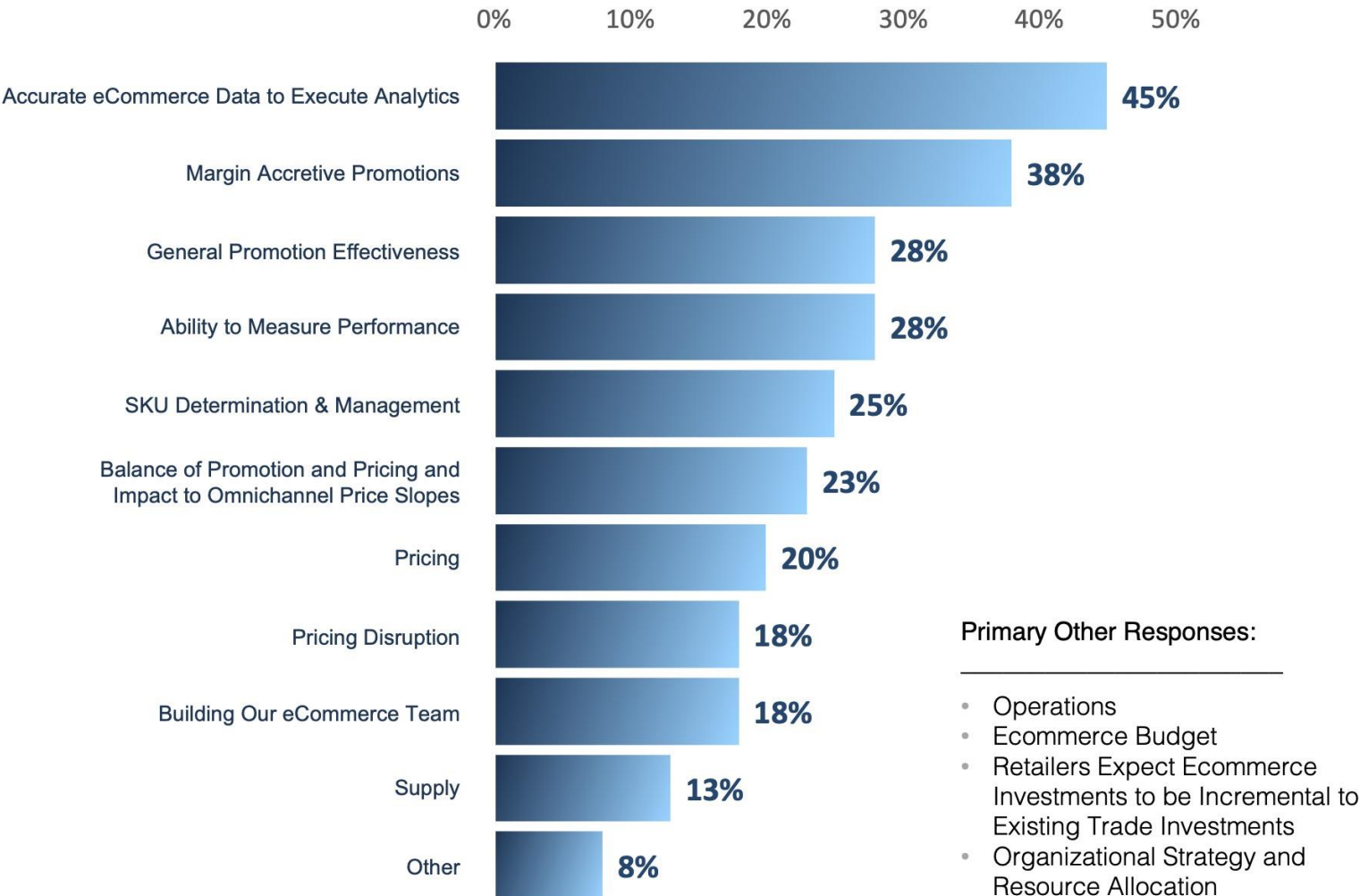


# What have been your top eCommerce challenges? (Select all that apply)

In the past, eCommerce planning was typically not entered into Trade Promotion Management (TPM) systems. However, modern EPx platforms now support eCommerce tactics, flexible hierarchies & planning levels, and configurability of reporting to facilitate eCommerce planning.

When eCommerce, RGM, marketing, sales, finance, and supply teams access omnichannel planning through enterprise reporting, it becomes easier to address key eCommerce and supply challenges and achieve the total enterprise forecast.

**Forty-five percent** of respondents continue to face challenges in obtaining accurate eCommerce data for effective analytics. Cultivating a culture of quick decision-making, even without perfect data, can drive progress. However, it's crucial to remain adaptable and adjust plans as improved data becomes available.



# Change Transformation



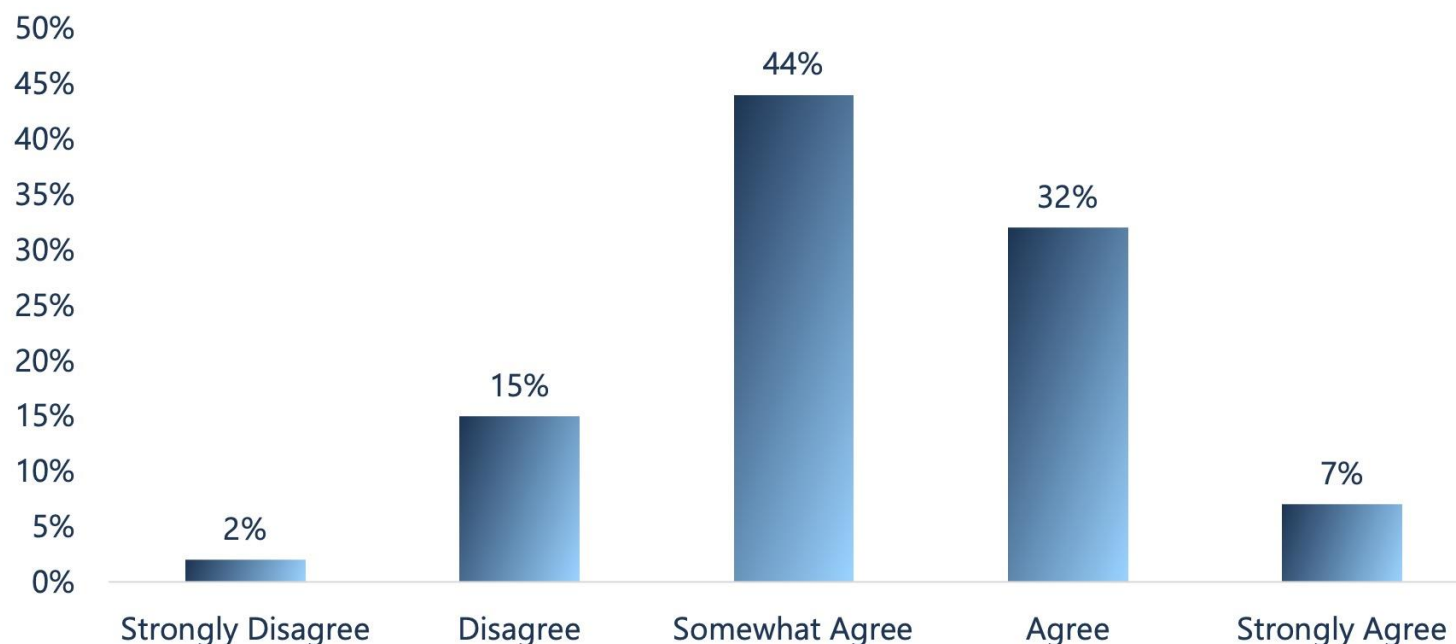


Effective change transformation is critical to improving all aspects of work within a CPG manufacturer and retailer. People are dynamic and essential to our organizations, so we must support them through the ongoing change.

Organizations are no longer experiencing change in isolated events but rather in a continuous and recurring wave-like manner.

CPG manufacturers and retailers need effective change management to navigate the waves of change and improve organizational dynamics and results.

## Change management has been an issue among TPM/TPMx users.



**Based on the POI State of the Industry Survey, 83% of respondents agree that change management has been an issue with users.**

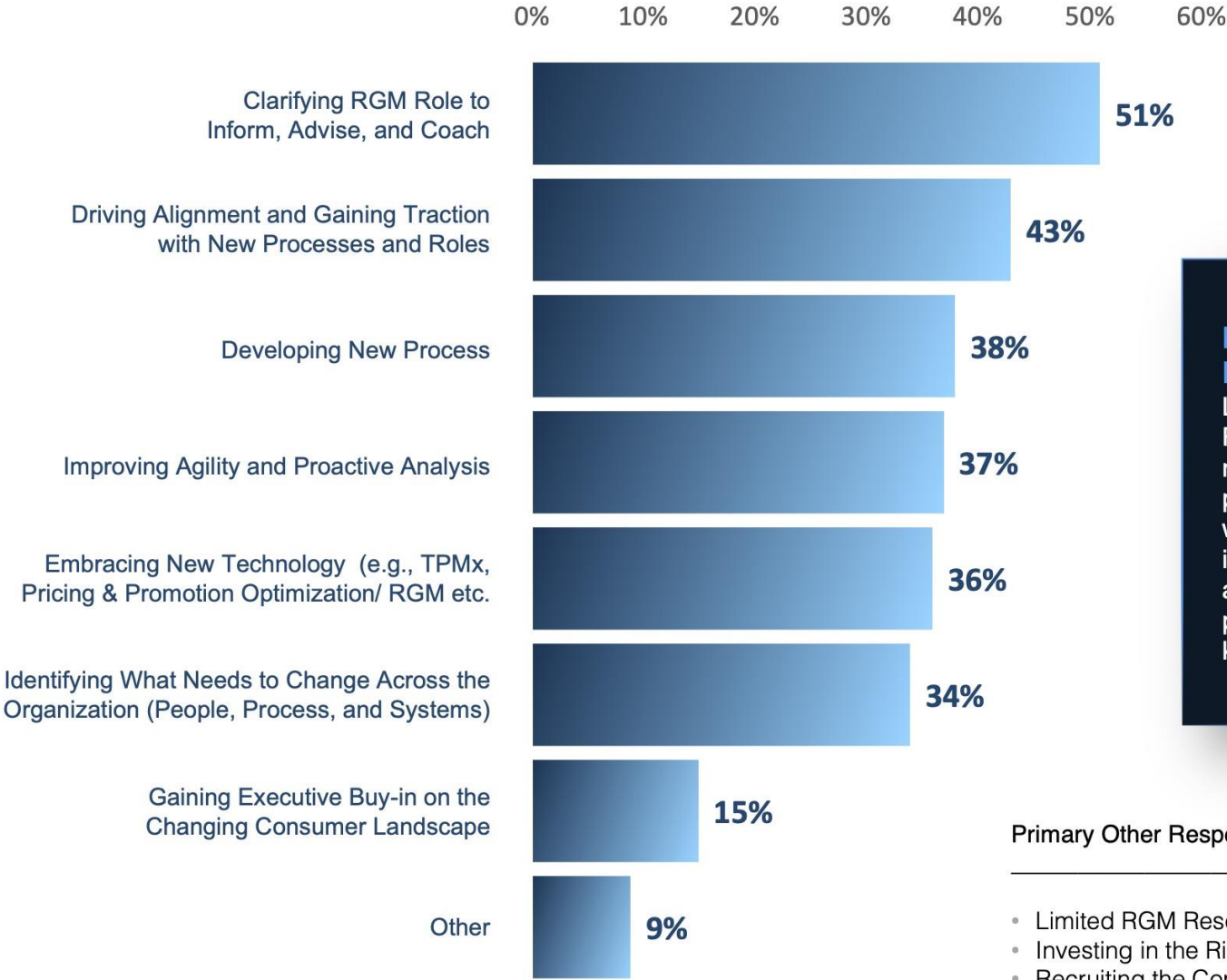


Whether at POI Summits, POI Share Groups, or during one-on-one meetings with manufacturers and retailers, change management challenges frequently emerge as a key topic of discussion.

**Fifty-one percent** of survey respondents note that they have struggled to clarify RGM's role in informing, advising, and coaching their organizations. RGM teams desire to be trusted advisors for their cross-functional partners, requiring time, knowledge, and socializing quick wins to succeed.

**Forty-three percent** struggle with driving alignment and gaining traction with new processes and roles.

# What have been your largest RGM change management struggles?



**From the POI RGM Share Group:**  
Leadership's comprehension of RGM is critical. As the practice matures and RGM leaders provide cross-functional teams with advanced analytics and insights, the organization must adapt its workstreams, processes, and ownership of key tasks.

Primary Other Responses:

- Limited RGM Resources & Capabilities
- Investing in the Right Talent, Data, and Tools
- Recruiting the Core Team

# Enterprise Planning Change Transformation



## Embedding New Capabilities into Organizational Processes

- Align cross-functional teams with key workflows.
- Update performance metrics to embed organizational priorities and desired project outcomes.



## Change Communication Strategy

- Craft a clear narrative explaining the "why" behind the project and what is changing. Don't forget the WIFM—"what's in it for them."
- Regularly update the organization on progress and wins.



## Cultural Shifts for Growth Mindset

- Foster a culture of enterprise collaboration and agility to adapt to new insights.
- Encourage innovation and experimentation, especially with new revenue strategies.



## Pilot Programs for Iterative Learning

- Launch projects in controlled environments or select regions to test and refine processes.
- Use pilot results to build confidence and inform the broader rollout.



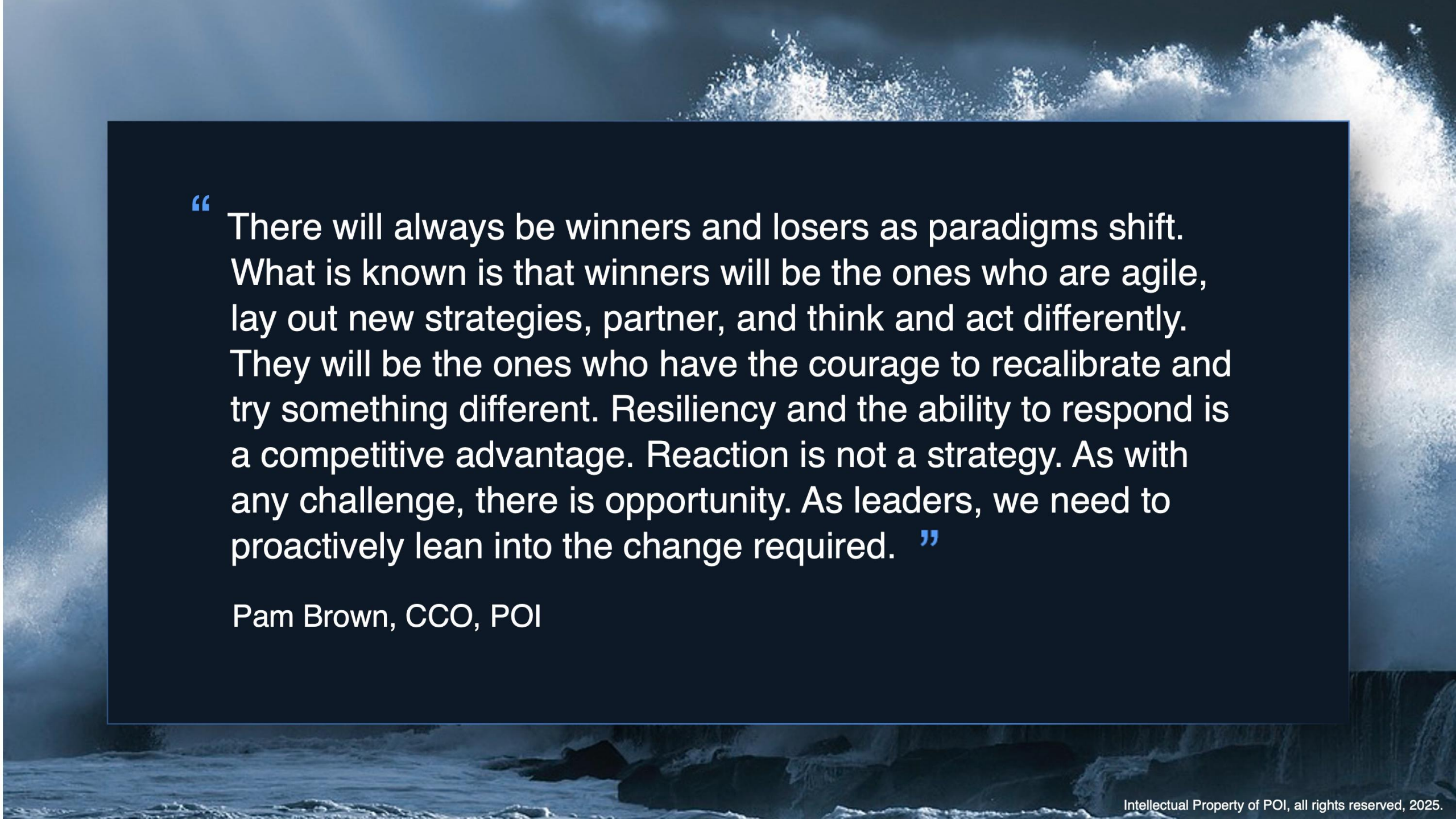
## Continuous Feedback and Adaptation

- Establish feedback loops to monitor adoption and effectiveness.
- Adapt strategies based on employee and stakeholder insights.



## Recognition and Reinforcement

- Celebrate milestones and individual contributions to drive motivation.
- Integrate project success into the organization's reward systems.



“ There will always be winners and losers as paradigms shift. What is known is that winners will be the ones who are agile, lay out new strategies, partner, and think and act differently. They will be the ones who have the courage to recalibrate and try something different. Resiliency and the ability to respond is a competitive advantage. Reaction is not a strategy. As with any challenge, there is opportunity. As leaders, we need to proactively lean into the change required. ”

Pam Brown, CCO, POI

# Survey Methodology & Respondent Statistics



# Survey Methodology

Based on multi-year survey results, POI analyzes the data, which is known as a longitudinal study. It isn't perfect because respondents change, or sometimes they aren't able to take the survey in subsequent years.

Nevertheless, this provides a richer look at the market because, across the six years included in this study, we have been able to:

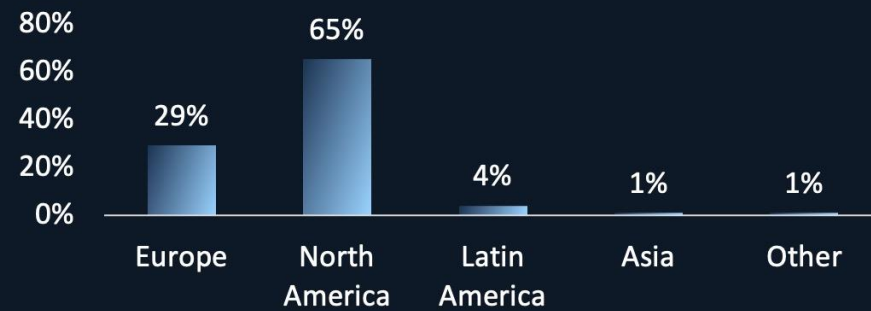
- Maintain consistency in survey respondents over the years. POI is engaged with several dozen people who continue to be at the same companies and have provided ongoing survey input from 2015 - 2024. This is one element of the longitudinal analysis.
- Continually track progress at the 42 companies that participated in the inaugural 2015 survey. This provides company continuity over time.
- Tracks continuity of over 97 companies that have taken the survey in the last 6 years, spanning 2018 - 2024.
- Bring in 13 new companies this year to lend a perspective to what we found last year. In some cases, the results are quite similar, and in other cases, we noted the beginning of a trend.
- Capture the feedback of over 140+ CPG companies in the industry.

This document makes descriptive reference to trademarks that others may own. The use of such trademarks herein is not an assertion of ownership of such trademarks by POI and is not intended to represent or imply the existence of an association between POI and the lawful owners of such trademarks.

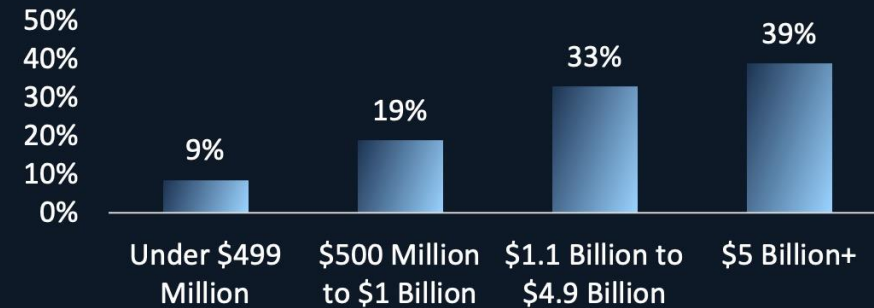


# Descriptive Study & Participant Statistics

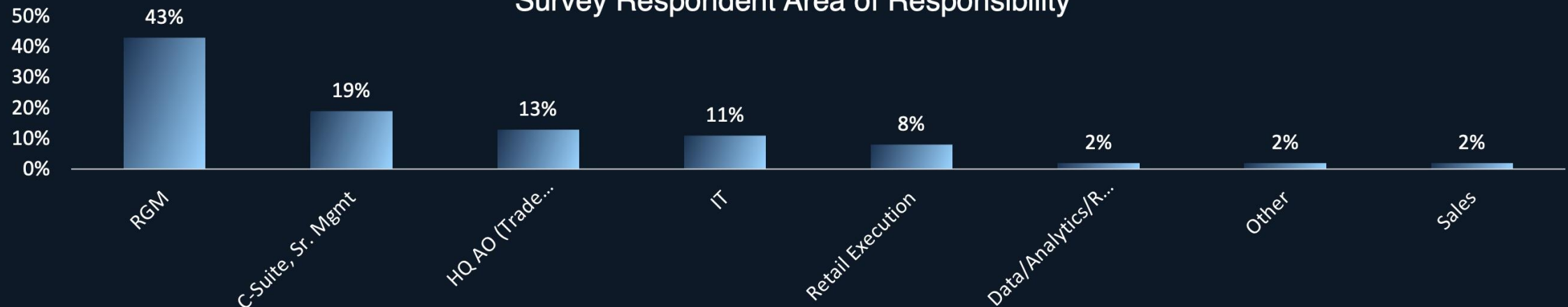
## Location of Corporate HQ



## Total Revenue



## Survey Respondent Area of Responsibility



## About the Author

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As Chief Commercial Officer, Pam creates and executes POI strategy, research, advisory, plus elevates practices and CPG and Retailer relationships.

Prior to joining POI, 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. She drove collaborative solutions and change across the organization based on corporate strategy and with the support of cross functional partnerships.

Prior to joining Del Monte, Pam worked for Unilever and quickly progressed through numerous sales positions of increasing responsibility. She then joined Kayser-Roth and became the Western Division Sales Director for all Retail CPG business west of the Mississippi. Pam has 30+ years of Sales & Systems experience and CPG leadership. She demonstrates a passion for creating a competitive advantage through high-performing teams. Pam earned her BA in Business Administration from the University of California at Riverside.



### **Pam Brown**

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## Contributor (Retail Media, Ecommerce, & RGM)

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Julie Oxner recently joined POI to lead strategic initiatives. She brings 27+ years of experience in CPG leadership, most recently as SVP of Business Intelligence at Acosta, where she developed advanced analytic client solutions in revenue growth management (RGM), eCommerce analytics, and supply chain solutions.

With a background in Chemical Engineering from UC Berkeley and an MBA from Arizona State, Julie's career spans CPG companies of all sizes, from Procter and Gamble to startups, with broad functional expertise in manufacturing operations, sales, insights, RGM, and spearheading data strategy and organizational culture change initiatives.

Julie actively promotes women in the industry through mentorship, peer connections, and various community leadership roles. She believes in continuing education and recently completed the Data Strategy and Communications Excellence certifications through the UC Berkeley Executive Education program.



**Julie Oxner**

EVP Strategic Initiatives,  
POI can be reached at  
[joxner@p-o-i.org](mailto:joxner@p-o-i.org)

## About the Designer

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Madelyn Grau has led POI's marketing, communications, and design department since 2023. With her leadership, the team has transformed POI communication, including our weekly POI Pulse Newsletter, marketing of POI events, webinars, white papers, research reports, and more.

Madelyn has been essential in creating POI's 2025 State of the Industry Report. The report's continued year-over-year improvement in look and feel is transformative. We aim to continue to upscale the report so you can easily utilize POI's research content in your leadership presentations, business cases, and strategic enterprise planning decisions.

If you haven't seen the new POI Pulse Communication, please do. It contains details about upcoming POI events, webinars, research, and more. POI looks forward to supporting your journey.

**Feel free to copy the link to enjoy POI's Pulse Newsletter, where you can discover all the amazing resources POI has to offer to support you on your journey:**  
<https://lp.constantcontactpages.com/su/ASWziSS/poipulse>



**Madelyn Grau**

Director of Marketing,  
Design, and Comms  
[mgrau@p-o-i.org](mailto:mgrau@p-o-i.org)

# About the Promotion Optimization Institute

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POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving enterprise planning, trade management, RGM, pricing, advanced analytics & optimization, data management, retail execution, digital transformation, omnichannel strategy, eCommerce and digital shelf, marketing and retail media investment strategy and performance, omnichannel measurement, and the 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, share groups, and industry-leading summits around the globe. POI aims to instill a financial and metrics-based discipline not typically found in other trade groups. We encourage and enable breaking down organizational siloes to ensure collaborative, holistic full enterprise planning. The focus is on the consumer/shopper through sales, marketing, and merchandising strategies while leveraging advances in technology. Our POI executive advisory board keeps us apprised of industry needs and helps us provide desired outcomes for members, sponsors, and academia.

**For more information, visit [www.poinstitute.com](http://www.poinstitute.com) or contact:**

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Pam Brown, Partner & CCO Promotion Optimization Institute (POI) 707-332-0450 [pambrown@p-o-i.org](mailto:pambrown@p-o-i.org)

# Learn More About POI

See how POI serves the CPG industry  
and tap into robust resources to maximize  
your organization's potential



# POI Offerings to Support Your Organization Today & Through the Future of Work

- **Certified Collaborative Marketer (CCM)™ Program** – Upskill talent in your organization through POI's certification for next generation CPG and Retail professionals.
- **POI Summits** – Advance commercial capabilities, hear peer-set strategies, learn modern approaches, explore vendor capabilities & services, and optimize the perfect store retail experience. Includes pre & post summit workshops to dig deeper into practical use cases.
- **Transformational Leadership Council (TLC)** – Cost pressures, inflation, board demands, omnichannel shifts, increased consumer expectations, new brand competition, innovation, DTC, aging technology, digital and organizational structures. Discuss how leadership teams prioritize “first things first” business plans and set a strategy for growth. Work through issues/opportunities created by the evolution of the new commercial ecosystem.
- **POI Share Groups** – Gain peer connection & collaboration, insight into best practices & trends, peer benchmarking, workshops, and access to POI resources.
- **POI Manufacturer Advisory** – Supports manufacturer investigation and selection of new Enterprise Planning (EPx) TPMx and RGM platforms through a 4-Phase/4-Month approach. Through the 4-Phase approach companies understand latest CPG trends, strategies and EPx best practices. CPG leaders gain alignment on what they are trying to solve with EPx capabilities. Business requirements are gathered and aligned. Vendors are determined based on best fit to requirements. RFPs are facilitated to determine final vendor selection.
- **Revenue Growth Management (RGM) Training and Enterprise Preparation** – Demystify RGM for your sales organization, prepare C-suite/Board with understanding of how RGM practices can support profitable growth, and/or arm your RGM leaders on their path to organizational change.



# POI | Summits | Research | Content | Connection



## Strengthen Cross-Functional Knowledge, Skillsets and Better Drive Mutually Beneficial Alignments Across Your Organization

### CCM Executive Training/Certification:

- 100% Online Delivery
- Included with POI Membership
- Executive Program held virtually or at St. Joseph's University, and others.
- Learn Collaborative Cultures, Analytics & Optimization, RGM, Pricing, Omni-Channel planning, CatMan, Digital, and many more skills & strategies.
- One-day virtual kick-off, 6-week self-directed study, exercises, and final collaborative project.

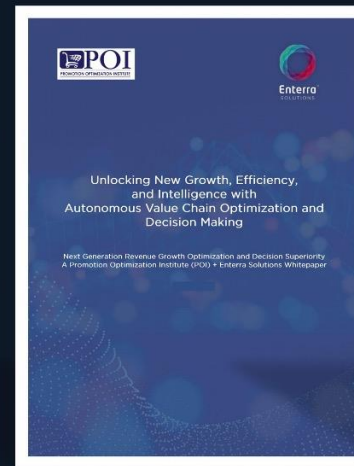
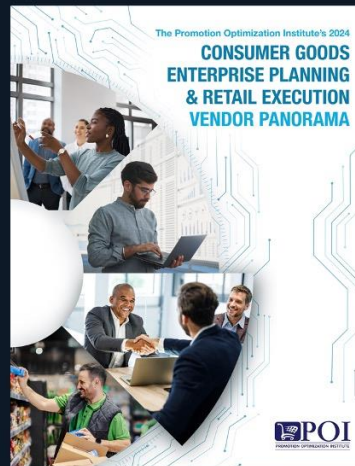
<https://poiinstitute.com/certification-ccm>



**Decision Point**  
**POI**  
PROMOTION OPTIMIZATION INSTITUTE

## Achieving RGM Excellence & ROI by Cascading Your Strategies into Execution

Friday April 14, 2023 11:00AM EDT/8:00AM PST  
Hosted by: POI Sponsored by: Decision Point



**SAP**  
**POI**  
PROMOTION OPTIMIZATION INSTITUTE

## Optimizing Profitable Revenue Growth

Strategies for effective revenue growth management and trade promotions (TPx) in changing market conditions.

Wednesday March 29, 2023 11:00AM EDT/8:00AM PST  
Hosted by: POI Sponsored by: SAP



**POI MANUFACTURER CONNECT**

Join the Quarterly Call hosted by POI with benefits including • Peer Connection • Insight into Best Practices & Trends • Peer Benchmarking • Opportunities for Collaboration • Resources

Contact Joanie Malin at [jmalin@p-o-i.org](mailto:jmalin@p-o-i.org)  
Space is limited

**POI**  
PROMOTION OPTIMIZATION INSTITUTE



**New Share Group**

**SHARING INFORMATION & BEST PRACTICES**

**REVENUE MANAGEMENT SHARE GROUP**

**PURPOSE**  
To provide members with a forum to discuss and share best practices, industry trends, emerging challenges and opportunities, as well as other relevant topics of interest.

**HOW IT WORKS**  
The group meets twice per year (Spring and Fall) at designated locations for one overnight. Meet 1 April on Day 1, followed by group dinner. Meet 2 on Day 2. **AGENDA** is an agenda to discuss and share best practices that are focused on the key trends and issues that are most relevant and valuable to the group.

**OUR LEGAL CONSENT**  
We agree to share information.

**BENEFITS**  
Members will have access to the group's shared information, which will be shared with the group's members. The group will also have access to the group's shared information, which will be shared with the group's members.

**MEMBERSHIP FEE**  
\$2,500 annually per member. The cost of the meeting expenses (travel, food, and other) is included in the fee.

**CONTACT**  
For more information, please contact the group's administrator.

# POI Summits – Connect, Learn, Inspire, and Share



# POI 2025 In-Person/Virtual Hybrid Summit Opportunities

The banner for the POI 2025 LATAM Summit features a vibrant orange background on the right side, which contains the event title and details. On the left, there is a photograph of a modern city skyline at night, with illuminated skyscrapers.

## POI 2025 LATAM SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

**Mexico City, Mexico | March 5-7** *Solutions for LATAM, by LATAM.*

The banner for the POI 2025 Spring Summit has a dark blue background on the right with the event title and details. The left side shows a photograph of a city skyline at night, featuring several tall buildings.

## POI 2025 SPRING SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

**Chicago, Illinois | April 16-18** In-person and virtual attendance available.

The banner for the POI 2025 European Summit features an orange background on the right with the event title and details. The left side displays a photograph of traditional European architecture, including colorful buildings along a canal.

## POI 2025 EUROPEAN SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

**Amsterdam, Netherlands | 13-15 May**

The banner for the POI 2025 Fall Summit has a green background on the right with the event title and details. The left side shows a photograph of a city skyline at night, with a prominent skyscraper.

## POI 2025 FALL SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

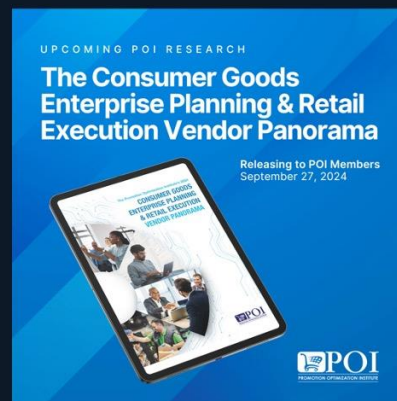
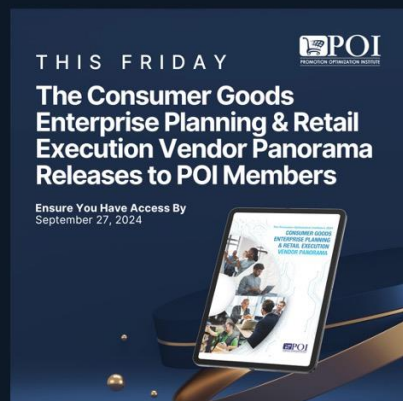
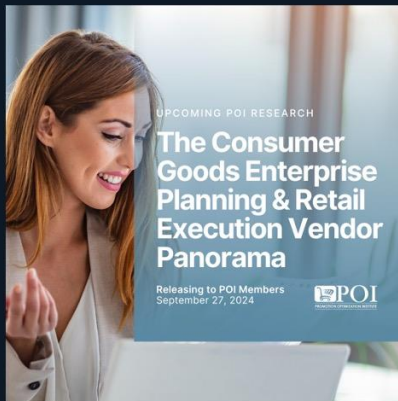
**Dallas, Texas | November 12-14** In-person and virtual attendance available.



Review Summit Agendas and Register Your Organization: [poinstitute.com/events](https://poinstitute.com/events)

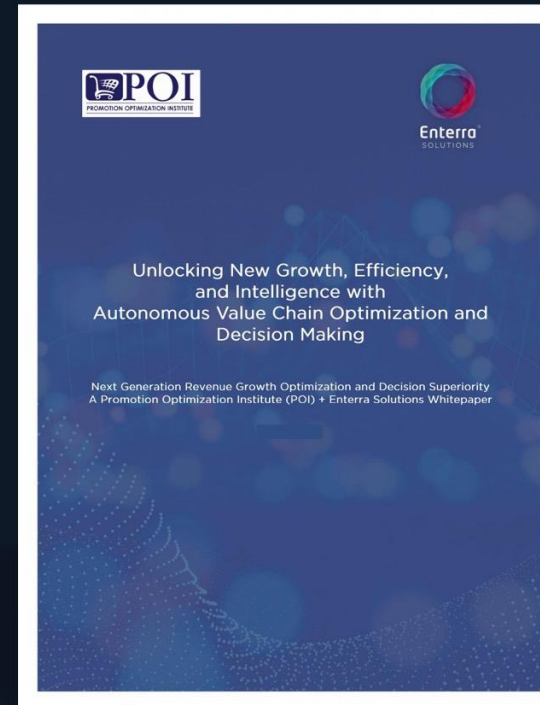
# Gain Access to POI's Enterprise Planning and Retail Execution Vendor Panorama Research & Report

- **Exclusive Consumer Goods Industry Enterprise Planning Research** — Renowned for its unparalleled depth in capability coverage, POI provides comprehensive insights with 5–10 pages per vendor, tailored to the breadth of each provider's ecosystem. This research goes far beyond standard quadrant analyses, offering expert perspectives from seasoned CPG leaders who have firsthand experience in leading capability implementations.
- POI's Vendor Panorama includes: Trade Promotion Management (TPM/TPMx), What-if Promotion Scenarios, Post-Event Evaluation (ROI Analysis), Revenue Growth Management (RGM), Retail Execution (RetX), Data Management, Advanced Analytics, Artificial Intelligence/Machine Learning, Modeling Approaches, Integrated Business Planning (IBP), Foodservice and more.
- POI's Vendor Panorama report is widely recognized by CPG manufacturers as the definitive resource for evaluating RFI and RFP vendor candidates.
- POI Best-in-Class Distinctions relay vendor differentiators.



Manufacturers rely on POI's Vendor Panorama to gain insights into the current market and vendor capabilities, enabling informed decisions about the vendors that best align with their organization's requirements. <https://poinstitute.com/membership/>

# POI Thought Leadership White Papers



**What's on your reading list to advance your career and cross-functional partnerships?**

# Strengthening Connections, Best Practices, and Learning

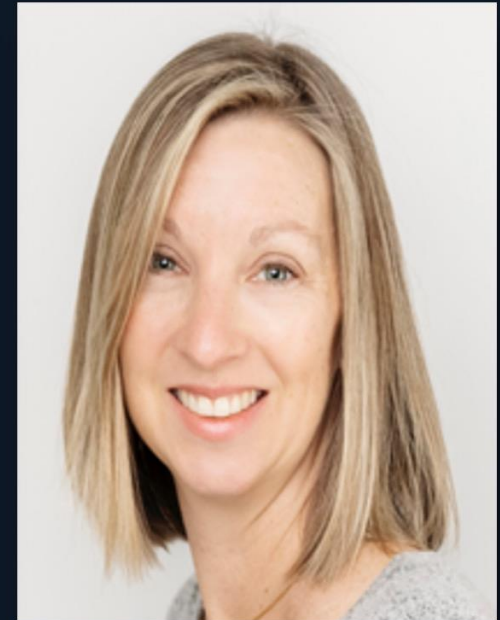
## POI Manufacturer Connect Share Groups for U.S., Canada, and Europe

- Peer Connection
- Insights Into Best Practices & Trends
- Peer Benchmarking
- Opportunities for Collaboration
- Resources
- Regularly serving 500+ manufacturers
- Meets every 6-8 weeks

**Don't do the journey alone!**



**Pam  
Brown**



**Sarah  
Meyer**

# Strengthen Revenue Growth Management Connections & Best Practices

## New Share Group



## SHARING INFORMATION & BEST PRACTICES

### REVENUE MANAGEMENT SHARE GROUP

**PURPOSE**  
To provide members with a forum to discuss and share best practices, industry trends, emerging challenges and capabilities, as well as other relevant topics of interest.

**HOW IT WORKS**  
This group meets twice per year (Spring and Fall) at easy in-and-out locations for one overnight. Meet 1-5pm on Day 1, followed by group dinner, then 8am-Noon on Day 2.

**AGENDA** is driven by members and their priorities so that we are focused on the key topics and issues that are most relevant and valuable to the group.

**OUR LEGAL COUNSEL** will attend bi-annual meetings.

**BENCHMARKING** survey allows members to compare their approach with others (e.g. structure, size, reporting relationships, budget expenditures, tools, etc.)

**MEMBER QUESTIONS** of the group that come up throughout the year are fielded by the group facilitators and reported back to the group anonymously.

**MEMBER SHOP FEE:** \$3,000 annually per member. This covers all meeting expenses (meeting room, food, AV, Wi-Fi, flipcharts, etc.). We do the room reservations. You just book your flight and pay for your sleeping room on arrival.

## Why Revenue Management?



**INDUSTRY DEFINITION**  
Revenue Management is the application of disciplined analytics that predict consumer behavior at the micro-market level and optimize product availability and price to maximize revenue growth. The primary aim of Revenue Management is selling the right product to the right customer at the right time for the right price and with the right pack. The essence of this discipline is in understanding customers' perception of product value and accurately aligning product prices, placement and availability with each customer segment. -Wikipedia

**REVENUE MANAGEMENT TOPICS (anticipated)**

- Revenue management analytics, e.g.
  - EDLP vs High/Low
  - Channel strategy
  - Pack strategy
  - Product mix
  - Promotion optimization
  - Sourcing and procurement
  - Value incentive curves
- Execution and sell-in considerations
- Strategic and tactical roadmaps
- Cross-functional collaboration
- Team structure and roles

**HOW DOES THIS GROUP DIFFER FROM OTHERS?**

- Revenue Management** share group is primarily focused on:
  - Strategic revenue growth (beyond trade marketing)
  - Trade off of list price vs. trade marketing spend
  - On/Off / off-dial strategy
  - Analytics to make revenue management decisions
- Trade Marketing** share group is primarily focused on:
  - Class of trade priorities
  - Trade promotion management
  - Funding and approval process
- Sales Finance** share group is primarily focused on:
  - General ledger, P&L
  - Processes and policies (Usabilities, SAOP, etc.)
  - Finance roles and Sales support

For more information, contact:

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Kensully1@poi.com

or

**Mike Kantor:** (814) 318-7308  
Mkantor@p-o-l.org





Vicente  
Garcia



Julie  
Oxner

# Strengthen Cross-Functional Knowledge, Skillsets and Drive Mutually Beneficial Alignments Across Your Organization

## CCM Executive Training/Certification

- 100% Online Delivery
- Included with POI Membership
- Executive Program held virtually or at St. Joseph's University, PSU, ASU
- Developing Skills and Strategies around Collaborative Cultures, Analytics, RGM, TPMx, Optimization, Marketing, and Digital Transformation
- One-day virtual kick-off, 6-month self-directed study, monthly virtual connection calls, exercises, and final collaborative project

The POI Executive Certification Program is tailored to equip current and future leaders in CPG and Retail with the skills needed to thrive in the New Reality.

<https://poinstitute.com/certification-ccm/>



# POI Manufacturer Advisory

POI Advisory supports manufacturer front-end project development, so organizations can move to faster decision making and execution to deliver the organization's strategic priorities.

## Advisory Capabilities Include (but not limited to):

- **Leadership Vision:** Sharing POI's State of the Industry Research & What's Possible Today Around Enterprise Planning, Guide Strategic Internal Alignments, and Inform Strategy Development
- **Can Include the Following:** Business Case Development, RFP Development, Vendor Determination & Execution, Systems & Process Project Planning, Revenue Management Training, Change Management, Strategy & Roadmaps, Communication & Socialization Plans...and more.

**People | Process | Plus, Enabling Capabilities/Systems**

## POI Advisors:



Pam Brown



Julie Oxner



Sarah Meyer



Vicente Garcia

# POI Enterprise Planning Capabilities Advisory



**Who's Helping You On Your Journey?**

## Tier 1 Manufacturer Advisory Client TPMx and RGM Parallel RFPs completed in 4 months

“ I had a great experience working with POI. They really helped us get through a very robust, and what could be a challenging process, of vendor selection for our EPx (TPMx and RGM) solutions. Pam and Sara were just phenomenal partners that helped us understand what our specific company's business requirements were, how to build out our team, and really helping us identify the right business partners for Hostess Brands. We couldn't have done it without the help of POI and the leadership and support they offered us throughout the process from the beginning to the end.

**Jack Harnedy**

(Former) Senior Director, Revenue Growth Management  
Hostess Brands

## Tier 3 Manufacturer Advisory Client TPMx RFP completed in 4 months

“ As I look back to our recent experience working with the POI team through our TPMx RFP, they were vital in the overall process of managing the RFP, including leading the demo process and organizing our internal task force. A key benefit came in leveraging POI’s expertise in “speaking the language” and having an intimate, current knowledge of these systems and broader marketplace, including the processes, and the problems. They were able to maximize the efficiency and effectiveness of our vendor selection process by cutting through the jargon and lingo, focusing on what’s important, and getting some truly deep and meaningful insights. Another critical value was the ability for POI to help align our project and leadership teams on critical decisions throughout the process. What could have been a year long process, took our organization less than 4 months from start to finish.

**Jim Loeffl**

Senior Director, Business Development  
Musco Family Olive Co.

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