

POI RESOURCES

TO SERVE YOUR ORGANIZATION

WHAT IS POI?

The Promotion Optimization Institute (POI) brings together manufacturers, retailers, solution providers, analysts, academics, and industry leaders to enhance Enterprise Planning, promotion, and distribution of consumer goods. The POI community fosters the exchange of cross-functional best practices through structured programs and informal interactions.

poinstitute.com

POI LEADERSHIP



Michael Kantor,
Chief Executive Officer
and Founder



Pam Brown,
Chief Commercial Officer
and Partner



Julie Oxner,
EVP of Strategic Initiatives



SUMMITS

POI delivers cutting-edge insights and best practices in RGM, Trade Promotion Planning and Optimization, Data and Analytics, AI/ML, Retail Execution, Omnichannel, eCommerce, Marketing, and Customer Experience. At POI Summits, CPG manufacturers gain valuable Enterprise Planning knowledge, connect with other industry leaders and technology providers, and find actionable tools to streamline operations and strategize for the future.

RESEARCH

- **The POI Annual State of the Industry Consumer Goods Research Report** peer-benchmarks the intersection of people, processes, and technologies across Holistic Enterprise Planning (Trade Promotion Planning and Optimization, What-if Promotion Scenarios, ROI, RGM) and in-store Retail Execution. It explores CPG industry trends, leadership and organizational priorities, data and digital transformations, and serves as a valuable tool for benchmarking performance, prioritizing initiatives, reinforcing decisions with key stakeholders, guiding improvements, and refining efforts.
- **The POI Annual Consumer Goods Enterprise Planning and Retail Execution Vendor Panorama** offers objective and comprehensive primary research and a deep understanding of the leading vendor advancements and capabilities available in market. It provides strategic insights and thought leadership, helping organizations explore new capabilities and solutions in the EPx and Retx space. POI's Vendor Panorama is a guide through the often challenging process of vendor selection, with in-depth excerpts on each vendor that enable an understanding of "what's possible" across Trade Promotion Management and Optimization, Revenue Growth Management, and in-store Retail Execution capabilities.

Want some peer perspective?

We have used the POI State of the Industry not just to benchmark but also to help prioritize our efforts. It has also served as a useful way to reinforce our choices with key stakeholders across our organization and support key asks with the right industry-wide data.

- **Colin McQuay, Senior Director, Head of Strategic Revenue Management at Nestlé**

ADVISORY (4 PHASES)

Accelerate your Enterprise Planning journey with POI's expertise. Our four-phase, four month, process helps you pinpoint the right Trade Promotion Planning & Optimization, ROI, Pricing, Revenue Growth Management, and Retail Execution capabilities and gain deeper insights to successfully choose a vendor.

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| 1. Setting the Stage
State of the Industry "what's possible" presentation and alignment on goals. | 2. Business Requirements
Insights from cross-functional stakeholder interviews and alignment workshops. | 3. Vendor Determination
Stack and align vendors for RFP process based on manufacturer's business requirements. | 4. RFP Execution
Formal process, vendor demos, and vendor decision with cross-functional alignment. |
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WEBINARS AND WHITE PAPERS

POI offers webinars and white papers throughout the year to keep manufacturers informed about industry trends, strategies, and technological advancements.

- **Webinars** are a platform for leading CPG manufacturers and solution providers to share insights on challenges, breakthroughs, and best practices across Holistic Enterprise Planning providing actionable strategies for your organization.
- **White Papers** deliver in-depth research on the CPG industry, highlighting opportunities and innovations that support your initiatives and prepare your organization for future growth.

TRAINING & CERTIFICATION

- **Revenue Growth Management (RGM) Training Programs** - POI's Operational Readiness Assessment and RGM Training Programs help your organization adopt RGM strategies faster and more effectively.
- **The Certified Collaborative Marketer (CCM)™, Executive Certification Program** - is specifically designed to develop the skills of current and future leaders in retail and consumer packaged goods (CPG) industries.

