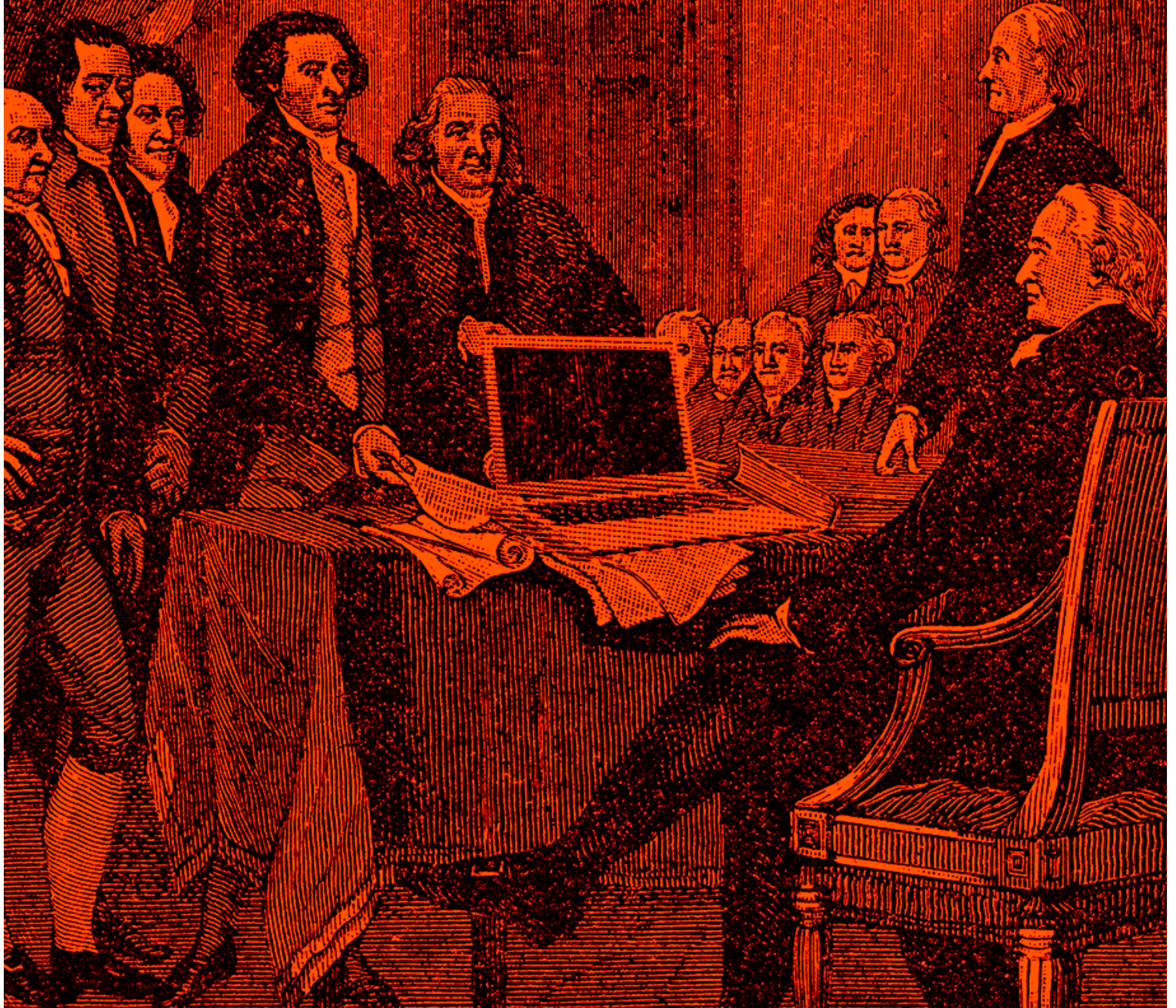# TRADE PLANNING BILL OF "RIGHTS"

In the super-competitive consumer goods marketplace, profitable trade promotions require the right framework and the right tools.

EXCEEDRA

TABLE OF CONTENTS

EXCEEDRA

We all know from history class that the Bill of Rights is a declaration of amendments to the Constitution of the United States designed to establish the fundamental principles of law and improve the way our country is governed. Though Trade Promotion Management (TPM) hasn't been around as long as this important national document, it certainly has been around long enough to become engrained into CPG business practice.

The purpose of this Trade Planning Bill of "Rights" is to declare that there is a "right" way to implement TPM to establish the foundation and principles of Integrated Business Planning (IBP). By applying the "rights" of trade planning, your company can improve trade planning governance and deliver more value while avoiding mistakes that may satisfy a need in the short term but in the long term become a barrier in your evolution.

There is a "Right" way to implement TPM to enable integrated business planning

EXCEEDRA

Introduction

If you are reading this whitepaper, then it is likely that there are opportunities at your company to improve Trade Promotion Management and Integrated Business Planning. If that is the case, then the Trade Planning Bill of Rights will give you the insights you need to improve your current situation. By putting the right strategies and approach into action, your company can establish the foundation needed to streamline planning, increase interdepartmental collaboration and integrate the right systems and information to drive better overall business performance.

For the purposes of this whitepaper, I have organized the Trade Planning Bill of "Rights" into three sections: **Prep**, **Deploy** and **Evolve**. Prep focuses on elements that should be reviewed, analyzed or changed prior to deploying a new system. Deploy addresses elements that are core to system implementation. Evolve concentrates on elements that should be part of post implementation to ensure continuous improvement. However, before you start down the road to improving your Trade Planning it is important to identify the challenges you are currently facing and drivers behind your decision to make a change.

PREP

- The Right **Process**

- The Right **Data and Alignment**

- The Right **Hierarchies**

- The Right **Visibility**

DEPLOY

- The Right **Scope**

- The Right **Timeline**

- The Right **Integration**

EVOLVE

- The Right **Review**

- The Right **Roadmap**

- The Right **Partner**

Know Your Trade Planning Challenges

The Bill of Rights was born out of a desire to improve the way our country was governed. If your TPM is taxing your nerves and patience, it is probably time to change systems and processes in order to improve outcomes. The reasons most companies change typically fall into one of two categories. Either it is driven out of organizational pain or it is simply time for the business to evolve and change. In many situations, it's a little of both.

Common Trade Planning Challenges

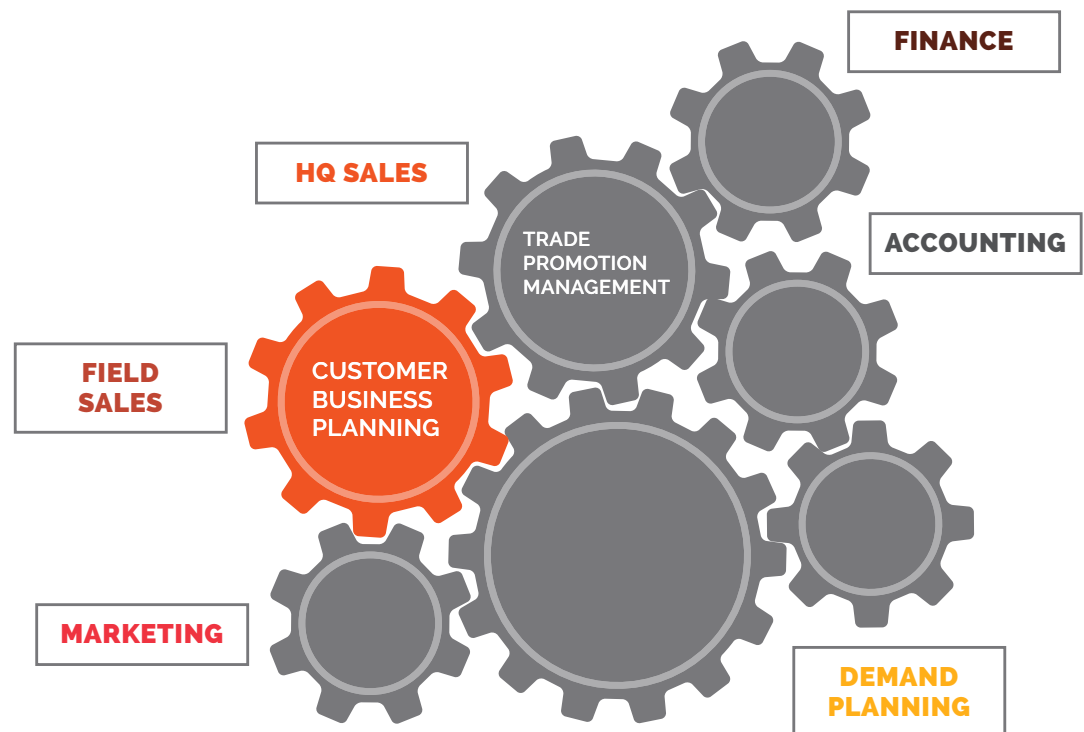| CHALLENGE DESCRIPTION	COMMON ROOT CAUSE
Takes too long to enter a promotion or create a customer plan	• Using ERP hierarchies instead of aligning sales plans promotions • Poorly designed user interface
Most customer planning is done outside TPM in Excel®	• TPM is shipment oriented and does not include consumption or other retailer-specific content • Lack of Scenario Planning capabilities
Off-line work created as stop gaps	• Integration was not set up properly • Process at cash application is not properly supported in ERP • Manual deduction sorting of trade/non-trade • Possibly, a bad process design
HQ doesn't trust the numbers in the TPM system	• True customer planning is outside TPM causing misalignment • Process is not set up to manage continuous reevaluation & updates as plans change
Reporting lags and inadequate detail	• TPM system does not have robust reporting • Requires pushing data out to other 3rd party reporting systems • Multi-step integration through a data warehouse

Common Evolution Drivers:

Often new senior leadership becomes the change agent pushing the business to evolve such as:

- improve the top line revenue and margins

- introduce advanced analytics to become more predictive and demand driven

- advance customer collaboration and improve strategic relationships

- enhance interdepartmental collaboration

PREP

The Right Process

As with any journey, you need to know the starting point in order to chart the best course forward. The first place to focus is on analyzing the planning and execution processes. The goal is to streamline these processes while improving decision making across the organization. Central to this goal is making it easier for sales to plan, analyze, and stay on top of the business while also providing finance, marketing, and demand planning the desired visibility and level of detail. To become more agile, you must bring together strategic and tactical planning in a way that feeds one another in support of Integrated Business Planning and revenue management. This will allow you to predict impacts of business opportunity and risk, quickly evaluate alternative scenarios, make changes to the plan, and evaluate performance against the iterative plan. To achieve this, it is important to understand your current state, identify planning issues, provide context for improvement, and identify important components and requirements to get started.

Introducing new efficiencies to the planning and execution processes will offer benefits across the entire organization.

EXCEEDRA

PREP

Analyze and Map

To understand existing interdependencies, bottlenecks and gaps in your current planning process, it is critical to begin the assessment by analyzing and mapping your current annual planning and S&OP processes. While this may be a large undertaking, it is critical in providing the basis for improvements. A common approach to this analysis starts by defining the annual planning from input of corporate strategy to developing the plans throughout the entire organization. By following the process throughout the year through the execution and S&OP processes, you will understand how plan updates and changes are affected. Make sure to include the following processes.

Annual Planning and S&OP Execution Process Areas

PROCESS AREA	SUB-PROCESS
HQ Sales Planning	• Funds Allocation & Management • Sales Objectives • Distribution & New Item Guidelines • Promotion Analysis • Plan Review & Alignment
Revenue Management	• Pricing Architecture & Management • Promotion Strategy & Guidelines • Customer Pricing Strategy
Customer Business Planning	• Promotion & Expense Management • Programs & Contracts • Business Plan Management • Distribution & New Item Management • Customer Baseline Adjustment • Post-Event Analysis • Joint Business Planning
Finance Management	• P&L Review & Analysis • Deductions & Settlement • Non-Trade Customer Expense • Financial Controls
Marketing	• Consumer Advertising Communication
Demand Planning	• Baseline Forecast Development • Incremental Volume Review • Total Forecast Analysis
Sales & Operations Planning	• Forecast Collaboration & Review • Period Snapshot Management • Demand, Supply, Inventory, Replenishment Alignment
Reporting & Measurement	• Standard Reporting • KPIs & Performance Management • Ad-hoc Reporting & Analytics

PREP

Various roles within each department will undoubtedly have differing visibility, analysis and timing needs. Understanding these role-based requirements provides the necessary detail to map the process and identify opportunities for improvement. Excluding any department can cause issues that may not appear until after a system is up and running, which is not a good position to be in.

Planning Culture—Top Down/Bottom Up

Most CPG planning approaches and cultures are engrained in the organization, whether it is a top-down-driven assignment of plans, a bottom-up-developed process or somewhere in between. In a top-down planning company, headquarters sales will analyze promotions and customers then assign specific plans and objectives to the field sales team. Typically this provides little autonomy for the field team to tailor plans to specific retailers. By contrast, a bottom-up planning company relies heavily on field sales to manage the business and develop plans within the company framework while balancing unique retailer requirements and programs. Understanding this cultural dynamic is important while mapping current processes and designing future processes because of change-management implications.

Customer Business Planning—The Heart & Soul

Customer business planning is at the core of any Integrated Business Planning or S&OP process. Improving these plans has far-reaching positive impacts. Better sales forecasts and incremental volume predictions drive improved demand planning, leading to better-informed supply chain management and manufacturing. Similarly, a process and system built with the right KPIs and sales incentives will improve execution and promotional effectiveness as well as finance and marketing visibility. Yet, unlocking this improvement is one of the biggest challenges CPG companies face today. A significant change-management effort is needed to shift to a consumption-based planning approach with embedded pre-planning and post-analysis capabilities, even if focusing on top customers. In many cases, new KPIs and sales incentives are needed to drive a profitability focus and an understanding of retailer volume- and promotion-planning metrics. However, when done correctly, customer business planning will improve strategic retailer relationships and support Joint Business Planning (JBP) efforts.

III EXCEEDRA

PREP

When designing a future state process, it is important to identify steps in the process that exist simply because of a current system limitation or gap.

One of the trade planning challenges mentioned above is that HQ doesn't trust the numbers in the system. This is symptomatic of customer planning that is developed outside of the TPM system and rekeyed into TPM as a way for field sales to report back to HQ. This also occurs when there is not an on-going process to drive post-event analysis and plan re-evaluation to ensure any necessary changes are made and visible to the organization.

For more information on customer business planning, please see the Exceedra whitepaper *The Right Stuff—Customer Business Planning* located in resources section of our website.

Future State and Best Practices

Tracing the process steps throughout the organization during the analysis and mapping stage will help identify gaps or bottleneck that exist because of current system restrictions. This important examination will give you a jumpstart on gathering requirements for the future state design and ensure that unnecessary steps are removed and the process is streamlined.

When designing a future state process, it is important to identify steps in the process that exist simply because of a current system limitation or gap. For example, I've seen some customers with a time consuming and lengthy promotion approval process that only existed because there was limited integration and functionality in their current system or because of a spreadsheet-based planning approach that lacked an approval workflow. Often the analysis uncovers opportunities to eliminate a lengthy or cumbersome process by leveraging business rules and controls to get promotions into defined guidelines at the time of creation. This is a great example of utilizing an automated, integrated system to simplify and streamline the approval processes.

The next step is a comparison of the current state against industry best practices for Trade Promotion Management and Integrated Business Planning. This exercise will yield additional areas for improvement, such as the integration of sales forecasts with demand planning and the alignment of planning baselines. Keep in mind that industry best practices are not a discreet list but rather a framework of proven approaches that may vary depending on your categories, industry segment or company dynamics. Ultimately, this comparison will provide context for how other organizations have improved processes and realized business benefits. Many organizations find that an outside point of view can bring deeper knowledge of industry best practices and a broader perspective on how companies enable process improvements.

EXCEEDRA

PREP

In designing the future state process, many companies sell themselves short by introducing limitations too early. This might be driven by some current organizational limitation, system limitation or even a resource limitation. For instance, it might sound like "we only have budget for $X this year so focus on what we can do now" or "that won't work because X system isn't set up that way." The introduction of early design limitations can have a major impact on the ability to drive continuous improvement in a consistent and coherent manner. The result is often a one-off project that has no roadmap or vision to guide necessary changes to process, systems and people to achieve the desired results.

Change Management

Once you've mapped the process, weighed it against best practices and designed the future state, it is critical to address change management. This can make or break a project. Effective change management requires executive involvement and support, effective communications, training and education, and a clearly defined on-going process throughout implementation. A recent change management best practices study by the Promotional Optimization Institute (POI) highlights best practices before, during and after deployment of a new system.

Change Management Best Practices

PRE-DEPLOYMENT	DURING THE DEPLOYMENT	POST DEPLOYMENT
• Limit the extent of change • Consistently leverage senior management • Listen early and listen often • Learn to communicate • Use appropriate incentives • Measure what matters	• Lead from the front • Don't skimp on training • Facilitate interactions among sales people	• Evaluate opportunities to continuously improve • Listen to the very end • Have an ongoing plan • Set adoption expectations

Source: Summary of points from a recent POI whitepaper, "Industry Research and Best Practices Change Management for Sales Organizations"

The Importance of Getting This Right

As simple as it may seem, automation of an incomplete or bad process only expedites the possible issues. The root cause of many complications can be traced back to a problem with the underlying business process. Additionally, a system that has been set up to support a single aspect of the planning process will not likely be able to support a broader process across multiple departments. Don't be afraid to make the right changes to improve the entire process and desired outcome.

PREP

The Right Data and Alignment

One of the primary goals of Integrated Business Planning is to improve the detail and timeliness of demand data to better support customer business planning and remove the inefficiencies and errors from offline planning. To accomplish this, however, it is important to go beyond the standard data feeds for master data that limit most TPM systems today—products, customers, sales org, pricing, cost/margin, shipment history, trade spend/payments and deductions.

To enable effective Integrated Business Planning, you must introduce additional external data sources, such as syndicated, retailer POS and wholesaler/distributor depletion data. As your customer planning process matures, there is additional retailer-specific information that can further improve customer business planning and support a retailer view, such as retailer promotion calendars, retailer KPIs and calculations. Revisiting master data to augment or simplify descriptions and levels of detail can also help unlock the full value of a better process and new system.

From an Integrated Business Planning perspective, there are additional data sources to support the needs of finance and demand planning. A more detailed customer P&L requires a broader set of cost information, such as non-trade or warehousing and distribution costs. Tracing these costs back to the source systems will allow you to attribute them to the correct customers and gain a better understanding of the true cost to serve. From a demand planning and supply chain point of view, it is important to get to an agreed baseline volume to understand the incremental volume driven by trade promotion. The baseline may be sourced from the demand planning system. Aligning the baseline across sales and demand planning may require effort in training and change management, but will be worth the effort to reach a common definition and approach for managing the baseline and its adjustments.

From an Integrated Business Planning perspective, there are additional data sources to support the needs of finance and demand planning.

DEMAND PLANNING	SCM		
	• Baseline Forecast	• Warehouse & Distribution	• Logistics • Special Handling
FINANCE	FINANCIAL PLANNING		
	• Non-trade	• Allocated costs	• Other
CUSTOMER BUSINESS PLANNING	CBP/JBP		
	• Consumption • Retailer POS • Competitive Info	• Wholesale depletions/Spin • VMI/CRP	• Retailer Specific Info • Retail Execution
CORE TPM	ERP		
	• Master Data • Pricing	• Shipments • Deductions	• Spending • COGs/Margin

EXCEEDRA

PREP

Data alignment is critical to ensure the integration with other systems is consistent and accurate. For example, mapping shipment to consumption data is key to enabling consumption-driven customer business planning. This includes mapping ERP product hierarchies to syndicated products, customer ship-to DCs to syndicated definitions and differing time periods so field sales and HQ have the proper views.

Once the right data is properly scoped, an on-going automated data management process is essential to account for changes and issues that inevitable occur, such as data errors, missing data elements, data augmentation, restatements and data anomalies. For example, having a process in place to manage the occasional restatement of syndicated data that may cause some remapping of products or customer hierarchies. It is going to happen, so have this process defined with an owner and an approach in place right from the beginning of the project.

Example of Mapping Shipment Data to Consumption Data

The Importance of Getting This Right

The right data set, the right level of detail and an on-going data management process are essential to the task of simplifying and improving Integrated Business Planning. Done correctly, each cross-functional area will be equipped with the most appropriate scorecards, analytics and decision support to achieve the desired outcomes. Get it wrong and you introduce limitations that may force work-arounds or, worse case, organizational mistrust and disbelief can spark a downward spiral.
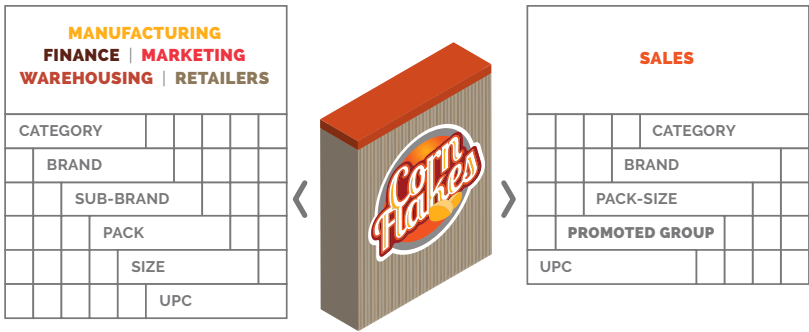
EXCEEDRA

PREP

The Right Hierarchies

As I have mentioned, the primary goal is to streamline and simplify the trade planning process as much as possible. Utilizing the right hierarchies for products, customers, sales organization and time periods is a key to achieving this. Typically, this means reaching the most granular level to enable data aggregation in different ways. In terms of products, this means a day/SKU/location level where the level may vary if your products are direct store delivery or warehouse delivered. A typical TPM deployment often uses an ERP hierarchy that was designed to support manufacturing, supply chain and finance. This type of hierarchy is often complicated, especially in larger companies that have grown by acquisition and tried to accommodate new elements that were not part of the initial scheme.

To avoid unnecessary complexities, best practices suggest creating a planning hierarchy for the customer teams that is mapped back to the ERP hierarchy.

To avoid unnecessary complexities, best practices suggest creating a planning hierarchy for the customer teams that is mapped back to the ERP hierarchy. This equips the sales team with simplified planning at logical promoted product groups instead of at the individual SKU level. This system approach will then push higher level plans down to the SKU level to be leveraged by demand planning or rolled up into the views required by finance and other departments. This mapping also allows for integration back to ERP and translation from a planning perspective to a reporting perspective. To achieve the most streamlined system capable of generating accurate reports from specific views, it is best practice to maintain separate hierarchies for product, customer and sales org planning with no intermingling, which is typically done because of some system limitation or missing elements in the ERP hierarchies.

An example of planning hierarchy for customers that can be mapped back to the ERP hierarchy.
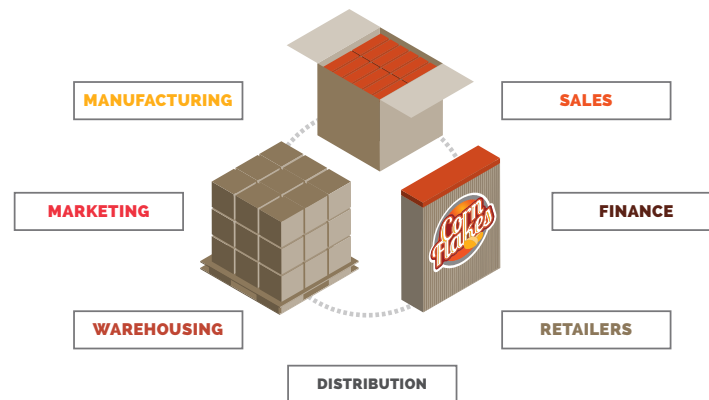
The Importance of Getting This Right

Establishing a planning hierarchy is one of the most effective ways to simplify sales planning and define the right views for each department. Missing the mark here limits this simplification and can also impact the integration.

EXCEEDRA

PREP

The Right Visibility

To support Integrated Business Planning, it is important to consider the many departmental areas and roles to ensure the right visibility for each. The center of this challenge is to simplify and focus the information that the end user sees on the screen. To accomplish this, the right data must be identified at the right level of detail and then mapped to the right hierarchies by department and role. Marketing, for example, might review the business at a brand level in broader time horizons and in less detail than finance, which needs to dissect trade spend to granular level. This also means accommodating differing roles within a department for access and reporting based on job tasks. A sales finance director requires broad visibility across product categories and sales regions according to their area of responsibility. A deductions analyst, however, will have a more narrowly defined role focusing on settlements and deductions. When designing the right visibility it is important to consider:

- data elements

- hierarchies

- planning & reporting views

- KPIs & metrics

- roles & access rights

- alignment with ERP & enterprise reporting

MANUFACTURING

SALES

MARKETING

FINANCE

WAREHOUSING

RETAILERS

DISTRIBUTION

To support Integrated Business Planning, it is important to consider the many departmental areas and roles to ensure the right visibility for each.

The Importance of Getting This Right.

The right visibility helps prevent the misinterpretation and misuse of information, which ultimately impacts user adoption. Without the right level of detail, it is more challenging to isolate the appropriate view by department and role.
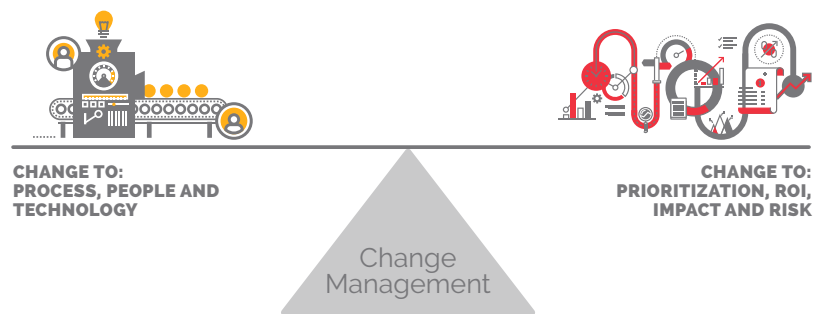
EXCEEDRA

DEPLOY

**Remember,
this is evolution,
not revolution.**

The Right Scope

Typically, the Prep phase will reveal more opportunities for improvement than can effectively be deployed in a reasonable amount of time. Because it is unrealistic to address everything at once, it is important to establish the right scope for phase 1 deployment—one that provides enough benefit to justify the investment. Obviously, this will vary by company and is dependent on the desired future state process, organizational maturity and overall change. The key to defining the right scope is to balance changes to people, processes and technology in a way that can move a company forward without over reaching. This must then be weighed against the impact on business priorities, project ROI and organizational impact and risk. For example, if phase 1 requires changes to master data or other systems to properly support an Integrated Business Planning process, then these changes must be considered holistically from a scope and timeline perspective to ensure all contingent work streams line up in sequence.

On the people side, finding the right balance between available human resources and skills and the desired future state process will help define the necessary change management. Assessing these change elements when developing scope and timeline will help determine what can reasonably be accomplished in phase 1 and what requires more time, education and training across the organization. The same principles apply to a process perspective. As the industry looks to improve advanced analytics, the prudent approach focuses on getting a solid TPM foundation in place before adding too much sophistication or too many disparate tools that increase work and complexity. Remember, this is evolution, not revolution.

Change Management Balance

**CHANGE TO:
PROCESS, PEOPLE AND
TECHNOLOGY**

Change
Management

**CHANGE TO:
PRIORITIZATION, ROI,
IMPACT AND RISK**

The Importance of Getting This Right

As with most things in life, too much too fast is a recipe for disaster. Finding the right scope balance provides benefit with adequate time to manage the change as you deploy and train. By establishing the right TPM and revenue management foundation, you will be equipped to effectively add advanced capabilities when your organization is ready.

EXCEEDRA

DEPLOY

Let the scope and a good implementation methodology dictate the timeline for the project.

The Right Timeline

The days of the 18–24 month TPM implementation are long gone. The right scope will generally dictate the project timeline in terms of duration following a standard implementation methodology. As far as timing, synchronizing the delivery with the annual planning process is often an effective way to allow the system to be put into immediate use. It is important, however, that getting it right takes precedence over meeting the start date of the planning process. Being overly aggressive on the project timeline will inevitably cause problems at some point during implementation. It is better to reduce the scope or take a phased approach than to try and reduce the timeline. This will ensure an effective deployment and avoid a rocky start or a bad user experience. Proper scope control is also required to keep to the project timeline. That is not to say adjusting the scope once a project has started is strictly forbidden; but if adding scope makes business sense, than this change needs to be properly accounted for in the project timeline to avoid increasing the risk level.

The Importance of Getting This Right

Let the scope and a good implementation methodology dictate the timeline for the project. Any deviation from this needs careful consideration to avoid unnecessary risk. There are no short cuts to getting it right.

EXCEEDRA

DEPLOY

The Right Integration

Best practice integration requires insight, experience and planning to navigate the unique requirements that inevitably exist in any company. The key to success is to make integration a sustainable on-going process with no surprises. To accomplish this as smoothly as possible:

- **prioritize the timing of data visibility—how critical is a specific data element in the day-to-day operations or in the annual planning process**

- **allow the prioritization of update frequency to guide transfer method, e.g., critical updates might need on-demand integration versus less frequent or critical updates in an overnight batch**

- **establish an automated process with scheduling and alerts**

- **ensure any system- or process-driven delays in data updates are known, e.g., a time lag from the ERP to the Data Warehouse will have an impact on visibility timing**

- **data mapping is essential to translating what is in the planning system back to ERP and Supply Chain**

- **don't be afraid to make changes where necessary to GET IT RIGHT**

The Importance of Getting This Right

Integration has a far-reaching impact on the timing of reporting, visibility and analytics. If implemented properly, those impacts will be positive. In done improperly, the opposite will be true. Garbage in, garbage out.

The key to success is to make integration a sustainable on-going process with no surprises.

EVOLVE

The Right Review

Following the project go-live, typically 6-12 months, it is important to conduct a thorough review of the project goals and business case to identify which objectives were accomplished and which were not. The right review will include analysis of:

- **future-state business process design**
- **gaps and opportunities identified & prioritized**
- **business case & benefits**
- **phase 1 scope & deliverables**
- **the results achieved to date**

This review will inform key stakeholders on the results achieved and keep management aligned on next phases, required resources and expected benefits. This exercise may take significant effort and outside help, depending on your resources and the complexity, scope and scale of the business. The investment, however, will keep the organization on track.

Project Review

Benefit Area	Business Case	Results
Trade Spend Effectiveness	2%	✔
Promotional ROI	5%	✔
Sales Planning Process Improvement	Fact Based Selling, Retailer Metrics	✔
Deductions Mgmt	Reduce Days Outstanding	✔
Forecast Accuracy	Improve 25%	✔
S&OP Process Simplification	Reduce Planning	✔
Improve Visibility	Improve Visibility	✔
Funds controls	Funds controls	✔

Keep management aligned on next phases, required resources and expected benefits.

The Importance of Getting This Right

The right review keeps the executive sponsors informed and the organizational capabilities moving forward by showing progress and benefits achieved. Without review, investment on additional capabilities may be difficult to come by.

EXCEEDRA

EVOLVE

The Right Roadmap

The project roadmap is a summary document that charts the improvement journey moving forward. The roadmap will help align executive support and keep the organization focused on a consistent, coherent and planned approach to continuous improvement. More important, if business changes occur that force the roadmap to alter, this living charter will guide the business through the changes and keep the organization focused on the established end-state goals.

When building a roadmap, a phased "crawl-walk-run" approach is a pragmatic way to make successful progress towards the project goals. The first phase should focus on getting the foundation in place. This includes bringing in the right data, mapping that data, establishing the proper integration, configuring the customer planning, and establishing a solid closed-loop process for planning, executing and analyzing the business. Phases 2 and 3 then add more advanced capabilities and benefits. This will look different from company to company based on needs, priorities, resources and organizational maturity. A solid roadmap also incorporates a plan to continuously improve the process and ensure that people are in the right functions and trained to meet company expectations—thus, accounting for people, process and technology.

Phased Roadmap

	PHASE 1	PHASE 2	PHASE 3
TECHNOLOGY	PLANNING FOUNDATION Plan, Execute, Analyze	CONSUMPTION BASED CUSTOMER PLANNING/ADVANCED TPO	INTEGRATED DEMAND PLANNING ADVNACED S&OP
PROCESS	PROGRAM MANAGEMENT		
PROCESS	BASE/INCREMENTAL PLANNING Post Event Analysis	BASE/INCREMENTAL PLANNING with Consumption	S&OP ALIGNMENT ADVANCED PLANNING & ANALYTICS
PEOPLE	CHANGE MANAGEMENT Skills Assessment, Training & Accreditation, Organizational Alignment		

The Importance of Getting This Right

The right roadmap will ensure an agreed-upon approach to continuous improvement and smoother progress along the trade improvement journey. Without a roadmap, your organization has no guiding vision or alignment on how to build capabilities in a practical and consistent manner.

EXCEEDRA

EVOLVE

The Right Partner

Last but certainly not least, the right partner will make the difference between success and something far short of your goals. The right partner should offer valuable skills and qualities that can professionally guide your journey to the end.

1	**DEEP KNOWLEDGE & EXPERIENCE** • The ability to understand your business, your organizational maturity, your desired roadmap • A deep experience and knowledge of best practices to help bridge your current process
2	**APPROACH FOR SUCCESS** • A pragmatic approach to finding the right balance for your company to ensure success with the phase 1 implementation
3	**FOUNDATION & ROADMAP** • Technology that provides a foundation on which to grow, not an anchor to a point in time that locks you into one way of working
4	**CUSTOMER RIGHTS** • A partner does the right thing for the customer

The Importance of Getting This Right

The right partner can be the difference between success and something less.

EXCEEDRA

Conclusion

Making change is hard but important to improve performance and behavior. When executed the right way, the improvements will drive better performance and position your organization to build a solid Integrated Business Planning process with the ability to add continuous improvement throughout your trade improvement journey. If you are reading this, then I will assume your organization is in need of or ready to make a change in how you manage trade and plan business. If so, give us a call.

About Exceedra

At Exceedra, our mission is to provide Integrated Business Planning and Revenue Management Solutions for Consumer Goods companies across the globe to help our clients be more agile in planning and make better decisions that drive business performance. Our market leading solutions enable greater control and return on investment for our clients and our service has been recognized as a distinct advantage in enabling project success.

Our solutions support Trade Promotions Management and Optimization, Customer Planning, Demand Planning, Sales and Operational Planning, and can be deployed in the Cloud or on premise. We are a global company, based in the UK, with offices in the US and in Australia. For more information, please visit us at **www.exceedra.com**.