



Data Buying Habits  
Business Intelligence  
Trade Promotion Management  
Assortment Optimization  
ROI CPG Merchandising  
Speed to Insights

## DISTILLING DATA FOR THE MOST EFFECTIVE PROMOTIONS AND IN-STORE MERCHANDISING

It wasn't that long ago when CPG trading partners were desperately seeking more information about consumers and their buying habits. Today the CPG industry is blessed with a wealth of information from a number of diverse data sources to include transactional scanner sales, demographic and attitudinal insights, household panel and retailer shopper card data. Now, the question is not how to get information as much as it is how to leverage the most relevant information for proper promotion of products and brands, enhanced store sales, and ultimately improved shopper satisfaction.

Today's abundance of data provides for greater business intelligence to uncover new sales opportunities and enhance business street smarts (or, as the case may be, aisle smarts). For example, analytics, from both robust scanner-based consumption data and retail shopping cart data, can be used to ensure that trade promotion optimization truly dovetails with shoppers' wants and needs. Having access to data in

an accessible and customized way, meanwhile, leads to quicker, sounder decisions in the field.

Tanya Domier, CEO of Advantage Sales and Marketing, an Irvine, CA-based agency specializing in CPG sales and marketing, says that being able to leverage information to take the right action at the right time and place is a key turning point for the industry.

She recounts how six years ago her company was seeking ways to serve clients and retail customers more proactively and strategically which lead to the identification of an unmet need in the CPG sales landscape. "We realized that while there was no shortage of information what was missing was a way for business managers to quickly uncover opportunities and apply actionable insights from our multiple and diverse CPG data sources," says Domier, adding, "We could not find a business intelligence platform that enabled us to quickly and effectively analyze all of this information and so we took it upon ourselves to build our own solution."



### A unique platform for boosting business intelligence

To Domier's point, Advantage Sales and Marketing (ASM) focused its efforts on creating a smarter analytical process that can be used across many disciplines in a CPG company.

The resulting ASM Speed to Insight™ business intelligence suite provides business managers with a guided business analysis leading them through the sales process from proactive opportunity identification through to robust promotion and assortment optimization. The platform uniquely enables analysis and insights across the landscape of multiple categories and retailers to quickly identify the most significant business building opportunities and the merchandising steps required to turn these opportunities into improved sales results.

ASM's Speed to Insight platform also improves trade promotion effectiveness by providing a high quality analysis of actual retailer promotional event performance with a financial overlay to evaluate ROI, profitability and overall event effectiveness. Such information can prove helpful across many disciplines, including CPG executive teams, category managers, customer teams, marketing teams and business sales managers and, when supported by strong financial, consumption and causal metrics, is the basis for more effective promotions moving forward.

## Moving fast in the right direction

ASM's Speed to Insight™ platform includes two tool sets:

The Sales Opportunity Explorer (SOE) is an ASM proprietary tool that sits on the desktops of their business managers. This tool allows for the input of data across multiple categories and retailers, thereby providing a sweeping look across the entire landscape of CPG companies, enabling them to quickly identify where they have the biggest growth opportunities or most pressing performance issues. The SOE tool also allows business manager to drill down on those opportunities and issues to understand their cause and recommend corrective action. The inclusion of household panel data provides insight into how well retailers are aligning with their shoppers and how they can capture more of their shoppers' category dollars.

The Causal Opportunity Explorer (COE) is a tool that sits on the desktops of ASM category managers, with output also relayed to business managers. This desktop tool combines consumption and financial data to calculate key promotional metrics like ROI, cost per incremental case sold, and subsidized volume, and includes fundamental alerts for teams to take immediate, effective action. In addition, the app provides a retailer performance scorecard identifying overall promotional performance over a certain time period and benchmarking multiple promotional events. Category managers and business managers have the ability to capture full financial investment against each promotion event (i.e., ad insertion allowances, off invoice, bill back, scan down, etc.). Meanwhile, an assortment optimization tool helps fill gaps by identifying items that are not currently stocked by a retailer yet do well at competitive retailers.

Beyond allowing for immediate alert-based actions, the Speed to Insight business intelligence suite enables ASM business managers and others to conduct deep category reviews for greater long-term success.

Fundamental alerts allow teams to take immediate, effective action, while a retailer performance scorecard is provided to identify overall promotional

Now, the question is not how to get information as much as it is how to leverage the most relevant information for proper promotion of products and brands, enhanced store sales, and ultimately improved shopper satisfaction.

## Today's retail sales representatives are swapping hand-held devices and bulky paper files for more sophisticated and user-friendly tablets.

performance over a certain time period and benchmark multiple promotional events. Beyond allowing for immediate alert-based actions, the Speed to Insight business intelligence suite can spur CPG business managers and others to conduct deep category reviews for greater long-term success.

Ultimately, the common platform of Speed to Insight leads to improved shopper alignment and satisfaction. "Shopper alignment is an important part of the process. Business and category managers can work with retailers to understand how well they are aligned with shoppers in their categories by looking at buyer and trip conversion rates, purchase size and frequency and setting up an alert system using those metrics," explains Peter Holton, ASM's SVP of Business Intelligence, whose team conceived of and led the development of the platform. "That way, we can understand if retailers are effectively reaching and converting their potential shoppers within each category, leading to improved shopper alignment and increased category sales."

### Agility with mobility

Effective merchandising based on the right-time, right-place leveraging of analytics is a multi-pronged effort. In addition to better business intelligence and promotion programs, CPG companies can bolster their effectiveness at the store level by improving product availability (reducing out of stocks), gaining shelf space for their new products, and executing promotions and displays to drive incremental sales.

Just as capabilities like business intelligence suites have improved, so too has technology for in-store merchandising. Today's retail sales representatives are swapping hand-held devices and bulky paper files for more sophisticated and user-friendly tablets. With mobile tablets, retail sales representatives are provided with all the information they need to effectively merchandise their brands at store level along with instant reporting of store conditions to both retailers and CPG companies.

In addition to providing information for item stocking, pricing and promotions, tablets are useful sales tools for interfacing with time starved retailer in-store personnel. A retail sales representative can engage and educate store managers regarding upcoming promo-



tions and seasonal selling periods with graphical sales presentations on a tablet device. ASM's Pitch Book is a unique tool that integrates store level data and professionally developed sales stories into an organized and compelling presentation that can be delivered quickly and concisely to key personnel in the store. These presentations can include high-impact graphics and video content, but the most distinct and useful feature is the highly integrated store specific data and assortment recommendation tools that are customized for each store.

The ASM Speed to Insight tool and the mobile Pitch Book are two ways that ASM helps CPG manufacturers capture and leverage data to enhance their promotion effectiveness and brand presence with their retail partners. For more information on sales and marketing tools for both headquarter sales and in-store sales, visit [www.asmnet.com](http://www.asmnet.com) or send an email to [businessintelligence@asmnet.com](mailto:businessintelligence@asmnet.com).

