

“Enabling the generation of winning and achievable customer business plans.”

Customer Business Planning (CBP)

The demand on commercial teams to deliver improved business performance never ceases in today's trade environment. Sales teams are poorly equipped and use disparate systems, spreadsheets and data sources which are built for control rather than commercial decision making.

All too often, this leads to missed opportunities and gaps being identified too late for effective action. Companies are looking for a solution that enables improved capability and efficiency and that can be deployed globally, supporting their varying geographical trading models.

Why Exceedra Customer Business Planning

- Designed and built from the bottom up to enable commercial teams to improve business planning and tracking capabilities.
- Allows more accurate plans to be generated at a faster pace, and the creation of multiple scenarios that can be reviewed side by side to assess margin impact for both manufacturer and retailer.
- Allows all aspects of commercial funding and relevant cost drivers to be modeled.
- Built in best practice processes ensure teams produce more robust plans.
- Exceedra operates a range of delivery models to suit different client requirements.

Customer Proof Points

By using Exceedra customer business planning companies can improve overall margins by 1-4%, reduce the overall cost of managing trade investments and increase ROI: Exceedra TPM customers have been seen to increase sales by 1 to 2 percent, improve trade ROI by 20% and decrease inventory levels as well as accounts receivable.

Customer Business Planning Solution

The Exceedra solution brings together sales and commercial finance teams to fully assess and optimize plans associated with trade promotion management, other funding (e.g. rebates and growth incentives), joint business planning, annual planning and sales insight within an easy to use and integrated framework.

<p>Budget & Target Setting</p> <ul style="list-style-type: none"> -Trade spend budgeting -Account/product allocation -COGS modelling -Version control 	<p>Account Planning & Tracking</p> <ul style="list-style-type: none"> -Rapid scenarios -Complete trade investment modelling -Enhanced actuals reporting -Exception management 	<p>Customer Margin Management</p> <ul style="list-style-type: none"> -Customer margin modelling -Customer margin tracking -Scenarios -Exception management 	<p>Trade Promotion Management</p> <ul style="list-style-type: none"> -Promotion planning & budgeting -Scenarios -Status & approval management -Program visualization -Optimization
<p>Volume Planning</p> <ul style="list-style-type: none"> -Baseline management -Uplift predict -Demand review reporting -Approvals 	<p>Scenarios</p> <ul style="list-style-type: none"> -Annual plan -Promotions -NPI -Pricing & costs 	<p>Risk & Opportunities</p> <ul style="list-style-type: none"> -New products -Distribution changes -New channels -Competitor activity 	<p>Pricing & Terms</p> <ul style="list-style-type: none"> -Pricing management -Terms management -Approval processes -Analytics

- Customer Business Planning

- Trade Promotion Management

- Joint Business Planning

- Sales & Operational Planning

- Integrated Insights

How Exceedra improves Customer Business Planning

End to end process It is a complete end to end solution that enables an effective yearly customer planning process. Supporting all channels to market, it brings base, promotions, pricing, costs and marketing components together to provide a holistic perspective. Monitoring capabilities allow stakeholders to identify gaps and opportunities ad-hoc and during the monthly planning cycle.

Shared insights It provides aggregated analytics with full drill-down capabilities that cater for management and finance teams, as well as day to day users. This provides new and critical insights that support a more informed approach to decision making. The entire business now has a view of the same plan from different angles based on their needs.

Effectively resourced process It provides a closed loop process that streamlines and simplifies existing approaches; this generates more time to run scenarios and optimize the plan, speeding up buy-in across functions. The solution enables a clear delineation of ownership between decision making steps and labor-intensive tasks.

Business services model Exceedra delivers solutions and services that help clients, build their customer business plans more efficiently and effectively globally. It includes our consulting services and industry-leading technology, which can be hosted on the cloud or on premise.

Integrated It integrates into existing business planning and execution processes and systems. It also integrates external POS or syndicated data, providing significant insights that contribute to decisions that improve forecast accuracy, accurate management, retailer profit modeling and promotional execution.

Predictive planning It enables the use of predictive analytics and scenario modeling to reliably generate an optimum and rigorous plan, in which the joint value can be clearly understood by the retailers/distributors and for the category.

Results

Strong and sustainable step changes in commercial margin performance.

Integration

- One solution for Commercial Planning, Budgeting, Tracking, Optimization, Promotions, Pricing and Terms, Sales and Operational Planning, Joint Business Planning and Insight Discovery.
- One tool for multiple business units/countries with same core processes supporting local trading models.
- Modular deployment based on client needs.

Optimized Plans

- By streamlining commercial administration and planning and providing structured insights, generated plans can be reviewed by multiple stakeholders, internally and externally.
- Once agreed, plans are easily converted to execution.

Visibility

- Detailed bottom up commercial scenarios that are financially and commercially robust.
- Roll-ups summaries with drill downs.
- Exception management.
- Decision ready reports and insights.
- Ease of use to wide adoption.

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