

Consumer Goods Company

Case Study

Strategy & Performance

ANNUAL SALES PLANNING

Process & Analytical Support for Planning

Background

A consumer goods client has an annual sales planning process that includes 14 global regions, covering 120 country plans. The process is designed to support sales, brand marketing, operational and financial performance forecasting. A robust process exists with well established input spreadsheets, consolidated at both a regional and global level for further analytical reporting via Business Intelligence (BI) systems.

Although an established methodology, global strategy wanted to challenge insight being gathered and introduce new perspectives for innovation and improved performance measures.

Challenges

Working with multiple planning systems across the 14 different regions, the client faced a number of challenges including:

- Making changes to existing data-capture processes with front-line staff
- Complementing external market data sources to help test the insight coming from 120 individual cells
- Designing and introducing new analytical modules to support the iterative KPI (Key Performance Indicators) agreement for each region
- And integrating analytical modules with existing infrastructure, locally, regionally and globally.

PMSI approach

After undertaking discovery with stakeholders from global strategy to local finance, PMSI were able to propose a pilot approach, including:

- MDM (Master Data Management) for Nielsen data across 2 pilot regions, covering 9 country cells
- Automated MDM for existing manual data-capture processes
- Introduction of margin focused analytical modules across country, brand and distributor portfolios
- And change management support via the PMSI Click™ platform for all stakeholders involved in the pilot and the steering committee.

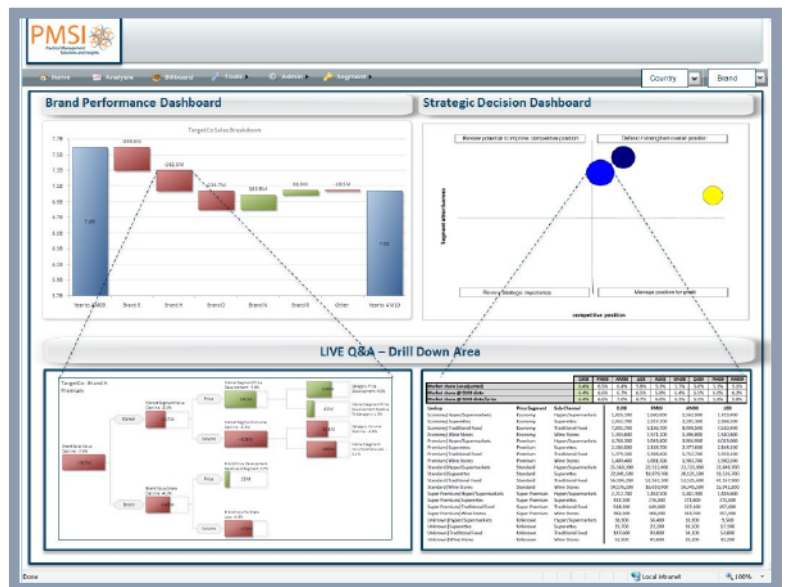
Case Study continued

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Outcome

From the outset, this project was about developing the client's existing processes and leveraging a culture of performance. As a result the PMSI Click™ platform has allowed the project team to test and introduce analytical modules without making large disruptive changes to existing working practices or infrastructure. This has supported the change management process by allowing peer-to-peer evaluation of output and a clearer path to future data warehouse and business process needs.

This collaborative approach to introducing new perspectives to the annual planning and forecasting process has supported greater acceptance of output and commitment to KPIs.



“ Taking the margin focus to all levels of the planning process has seen a dramatic improvement in how the different brand and sales teams work together. It has been extremely rewarding working with the teams as they uncover the real drivers to their performance and that can only continue to deliver efficiencies ”



Pamela Edmond Associate Director

Pamela is an experienced industrial marketing, product and brand management specialist with 15 years experience working for industrial manufacturers and distributors, including BOC Gases, Wesfarmers & The LindeGroup. Her most recent consulting experience includes knowledge-management and innovation process programmes for The Linde Group, sales effectiveness for Oracle Corp EMEA and strategic customer segmentation for ESAB.