

Aligning Sales and Marketing through Holistic Trade Planning

A leading marketer and distributor of spirits and wine was hindered by the organization's inability to harmonize sales, marketing, finance and demand planning in the creation of effective customer and trade promotion plans. Consequently, off-premise advertising and promotion programs lacked suitable ROI. Clarkston Consulting was engaged to help the company effectively integrate cross-functional business processes and systems in order to deliver compelling and integrated trade plans.

PROJECT OVERVIEW

COMPANY

Consumer Beverage
Company

INDUSTRY

Beverage / Alcoholic

PRODUCTS & SERVICES

Marketer & Distributor
of Spirits and Wines

EMPLOYEES

Approximately 200

REVENUE

Approximately \$250M

PRIMARY OBJECTIVES

- Cross-functional integration through organizational, process and system enhancements
- Maturation of trade promotion management
- Advertising and promotion effectiveness/ROI
- Margin enhancement

RESOLUTION

- Provided guidance on how to implement effective master data management and governance
- Created an integrated trade planning roadmap and 'quick wins'
- Defined and embedded a set of core KPIs across the business to provide a unified lens of commercial success
- Refined the annual planning process to reduce manual effort and redundancy
- Instituted more robust trade plans and cross-functional alignment
- Delivered a 'strategic pricing framework' to enable the client to deploy and monitor brand pricing resources more holistically

KEY BENEFITS

- Establishment of formal master data governance organization
- Efficient annual planning process with demonstrated cross-functional alignment
- Increasingly mature and integrated trade planning processes

TOP BENEFITS ACHIEVED

- Improved cross-functional integration
- Marketing alignment to drive a more efficient & effective annual planning process
- Data harmonization to promote system integration and greater insights creation