Consumer Products Case Study

PROJECT OVERVIEW

CLARKSTON CONSULTING

TPM Payments and Deductions Clean Up for a Leading Food Manufacturer

This client is a well-known global manufacturer, distributor, and marketer of pantry food products.

The client had been leveraging a recent implementation of the Infor M3 ERP system and recently added the UpClear BluePlanner TPM system to manage over $400MM in spend. Though the TPM system had been adopted well across the client's sales team for TPM planning, it existed in a complex IT landscape and nonstandard TPM design for managing promotions and settling deductions. This complexity led to numerous technical issues, manual bug fixes and the inability to accurately track actual promotion spend. Additionally, the support structure in place to manage the day-to-day system functionality was decentralized and lacked clarity across user roles and needed end to end functional ownership.

The client engaged Clarkston's trade promotion experts to provide an assessment and recommendations for improvement around both payments and deductions as it related to their Trade Promotion Management processes and systems.

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INDUSTRY:

Food

PRODUCTS AND SERVICES:

Pantry Food Items

PRIMARY OBJECTIVES:

- Assess the end-to-end Payments and Deduction processes and systems across Infor M3, UpClear BluePlanner and any related external sales systems
- Work with appropriate business, IT, and external leads to identify, prioritize, and escalate issues as required
- Begin executing the resolution plan post-assessment through the duration of the engagement
- Create roadmap and prioritize any outstanding issues
- Develop appropriate organizational structure to support the UpClear BluePlanner solution post-stabilization

RESOLUTION:

- Conducted a high-level assessment of the current TPM process and systems to identify, organize, and prioritize key issues interfering with critical end-to-end functionality
- Solved priority issues and stabilized the current TPM system to enable financial reconciliation
- Identified gaps in the current process and system in comparison to industry TPM maturity and best practices

KEY BENEFITS:

- Identified, prioritized, and developed a resolution plan for more than 20 process and system issues
- Led the team through triage, testing, implementation and validation of 4 key technical fixes
- Enabled the Finance organization to close the fiscal year with the new TPM system of record to within an acceptable write off range
- Recommended opportunities to improve TPM people resources, business processes, and system functionality
- Recommended prioritization for the path forward for future state enhancements

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Solved approximately 20 key system technical and functional issues

↓$14MM

Approximately $20MM in outstanding deductions balance was reduced to $6MM in time for financial fiscal year end close

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Five key settlements processes and sub-processes formally documented

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