

Conducting a TPM Assessment for a Pet Products Company

This client is one of the top companies in the pet care industry as a global manufacturer, distributor, and marketer of pet care products and vet services. The client's portfolio of products includes dry food, wet food, treats, and supplements.

With a trade promotion management (TPM) system due to sunset in 2025, the company saw an opportunity to reevaluate and transform its entire annual sales planning and forecasting processes, including TPM, into a more integrated and streamlined ecosystem. The client approached Clarkston to complete an assessment of its current systems and processes to help lay the groundwork for the implementation of more effective technologies. The client expressed that its current system was not being utilized to its full potential due to the misalignment with their business processes and data management, and wanted to ensure future business processes and data management would align with the capabilities of best-in-class technological solutions. The client wanted to create a solution that would minimize offline work, facilitate data integrations, and reduce the overall workload on its user base.

The assessment began with over 30 key stakeholder meetings to uncover gaps in current processes and systems. Next, findings were compiled, and 15 workstreams were determined based on areas that needed more analysis. Over five weeks, 45 meetings were conducted with each workstream team to dissect their processes and better understand opportunities for improvement. The output of the workstream meetings was an Executive Summary for each workstream, including a wish list and requirements needed for the future state. Clarkston then held a Future State Workshop to obtain further clarification on any outstanding discrepancies.

More than 60 stakeholders were involved across eight different functions throughout the entire process. The project culminated with a roadmap and prioritized requirements to guide the client through preparation for the implementation of an integrated process and system sales planning and forecasting ecosystem.

Consumer Products Case Study

PROJECT OVERVIEW

INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Pet care

PRIMARY OBJECTIVES:

- Assess overall approach to sales planning and forecasting processes, including TPM, from perspectives of process, technology, data, and organization
- Document pain points, opportunities for improvement, and vision for future using the sunsetting of the TPM tool as a catalyst to review the overall sales planning process
- Create high-level roadmap and detailed requirements to guide client through tool identification, design, and then on to an implementation phase

RESOLUTION:

- Conducted over 30 key stakeholder meetings
- Documented pain points and process and system gaps
- Held 45 meetings across 15 workstreams
- Identified opportunities for improvement and vision for the future
- Held in-person Future State Workshop to obtain clarification on process or system discrepancies
- Revised annual sales calendar based on stakeholder inputs and feedback
- Identified 120 detailed process requirements and 50 next steps for each workstream across six key pillars
- Determined resource needs and estimated time for next steps across each workstream
- Provided high-level one-year roadmap and detailed nine-month roadmap by key pillar
- Prioritized 15 key requirements based on impact and level of difficulty
- Summarized six key next steps for near future action

KEY BENEFITS:

- Achieved alignment around the desired future state and vision for an integrated network of tools to support sales planning and forecasting
- Provided client with documentation on pain points, opportunities for improvement, and future vision
- Identified the client's necessary requirements and clear next steps to create unified sales planning and forecasting ecosystem
- Created a roadmap for the client to guide them through preparation for vendor selection and, ultimately, the new system implementation



KPIs

- **120 detailed process requirements documented**
- **50 next steps defined**
- **1-year high level and 9-month detailed roadmaps provided**
- **15 key requirements prioritized**
- **6 key next steps summarized**

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