

Implementing Salesforce TPM for a Snacking Company to Enable Transformational Change

INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Snack products



BUSINESS TRANSFORMATION STORY & BUSINESS CHALLENGE:

The client, a global snacking company, was looking to transition out of its current Trade Promotion Management (TPM) system to a TPM platform that would enable additional ways of planning and support transformational change across the organization.

Due to the limitations of the current TPM system, most trade promotions were written in a way to manage a checkbook and reserve funds for deductions. Real-time integration with other tools, such as volume forecasting, was not available, which caused delays in full-year planning and gross-to-net views for the organization.

Having a TPM tool that integrated with other systems to decrease time spent using offline trackers and reporting would allow more time to be spent on promotion planning and event analysis. This was a complex project with many internal process changes that needed to be closely managed and monitored during the project timeline. Adding to the complexity were several “net new” capabilities, such as integrating consumption data, automating the risks and opportunities, and building a source of supply engine to manage indirect customer promotions.

The selected Salesforce TPM system was the foundation for the larger project across the organization and getting that foundation designed and built correctly was critical for the larger ecosystem to succeed.

PRIMARY OBJECTIVES:

- Successfully execute the “Design” phase for the new Salesforce TPM system
 - Identify and prioritize business requirements
 - Conduct design with larger ecosystem in mind, ensuring systems will work with TPM tool in an automated fashion
- Successfully execute a “Build” phase with an agile process over 8 sprints
 - Refine the product with each release within scope of the business requirements
 - Prepare data for use for SIT and UAT by end of build
- Thoroughly test the system with cross-team involvement
 - Meet weekly to track progress
 - Obtain approval that exit criteria have been achieved
- Develop and deliver comprehensive Process and Clicks Training content
 - Create training material highlighting business process context with stakeholders
 - Establish Change Champions and Subject Matter Experts to help support new system
 - Deliver training to over 400 associates, both support staff and account managers
 - Co-deliver training with client project team remotely and in-person regional workshops

SOLUTION:

▪ Design Phase

- Identified and evaluated the business requirement for relevance and priority, ensuring client needs were being solutioned for
- Brought best practices to help inform and guide client decision-making, proposing solutions to challenges
- Identified key process functional areas and specifics that needed to be addressed by the TPM system
- Advocated for the client when the vendor was not meeting the business needs as outlined and collaborated to define a solution
- Ensured key requirements were documented into the design with necessary detail to translate into a project plan for implementation

▪ Build Phase

- Reviewed feature updates with each sprint release and provided feedback or suggestions on possible improvements to meet requirements
- Provided guidance and/or draft acceptance criteria for requirements in process
- Drafted and/or updated user stories with client functional lead to ensure necessary detail was included to meet business requirements

▪ Test Phase

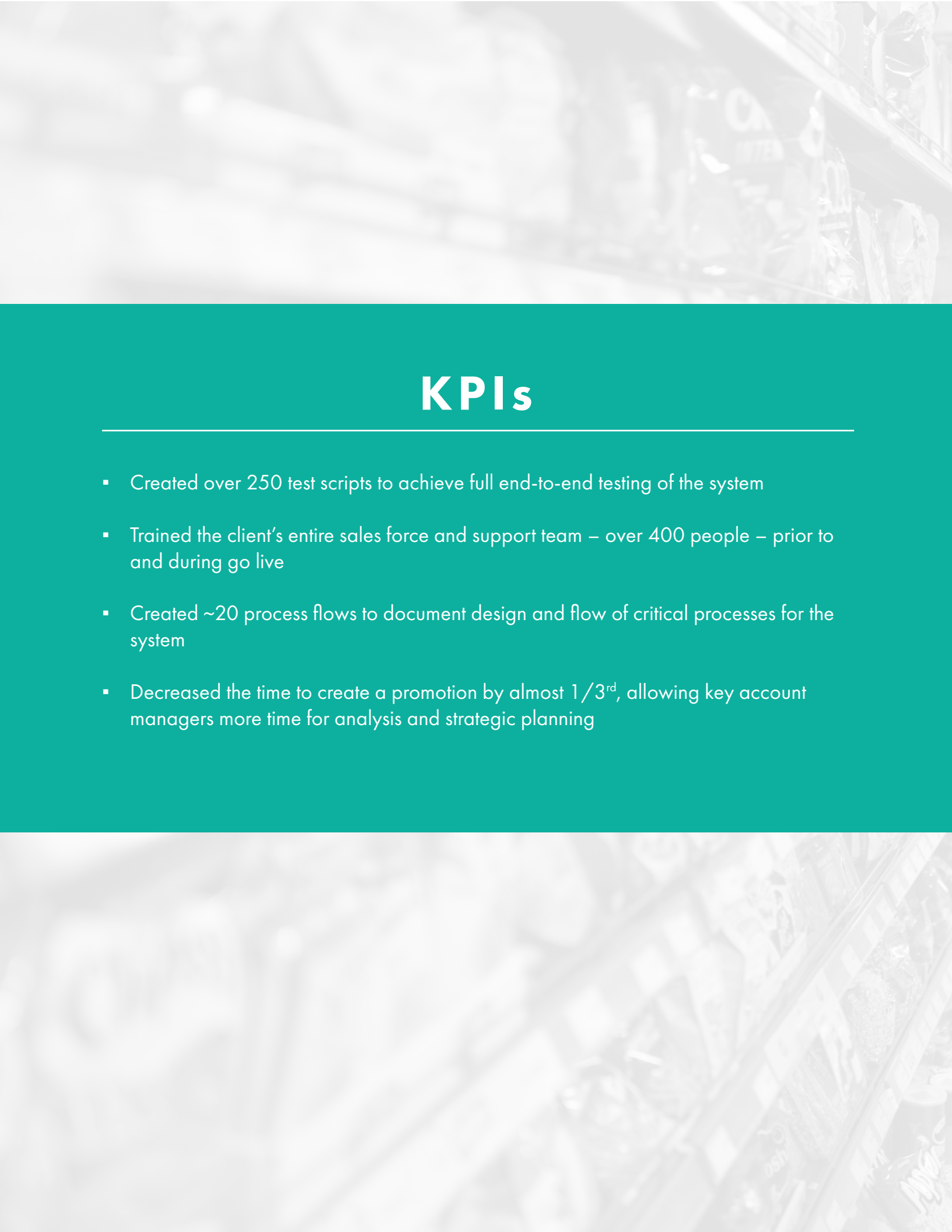
- Created master test scenario document with key scenario variants for E2E testing
- Developed test scripts for UAT
- Executed test scripts

▪ Training Phase

- Created content, in collaboration with client, for process and clicks training
- In partnership with the client, delivered both sessions over a 20-week period from pre-go live through go live, helping account managers create their plans for the coming fiscal year

KEY BENEFITS:

- Client is now able to:
 - Auto-integrate forecasting information directly into TPM
 - Manage one authorized distribution list in the system
 - Automate risk and opportunity function
 - See Latest Estimate in system
 - Gain visibility into Promotion pre-/post-ROI within the system
- Realization of consumption data integration in the system
- Comprehensive Customer Business Plan with real-time updates



KPIs

- Created over 250 test scripts to achieve full end-to-end testing of the system
- Trained the client's entire sales force and support team – over 400 people – prior to and during go live
- Created ~20 process flows to document design and flow of critical processes for the system
- Decreased the time to create a promotion by almost 1/3rd, allowing key account managers more time for analysis and strategic planning



“As a project team, we lacked the specific end-to-end expertise we needed to be successful, so [we] partnered with Clarkston to bring in the right team to not only deliver our project with excellence and on time, but also build those capabilities within our day-to-day organization.”

- SALES EFFECTIVENESS LEAD

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For more information about how we can help your company, [please contact us](#).

