

Transforming Marketing Activation for a CPG Company

A leading global food and beverage manufacturer engaged Clarkston to assess its current marketing activation operating model. The client relied on a third-party agency to support a broad range of consumer marketing programs, including coupons, premiums, contests/sweepstakes/games, sampling, and related activation tactics. While the existing model was strong from an execution standpoint, over time, it had become increasingly fragmented across brands, business units, stakeholders, and supporting vendors. Over time, the model delivered consistent execution but lacked strategic alignment, with significant variation across brands and stakeholder groups.

Clarkston was engaged to review the current-state process, evaluate how work was being performed across teams and partners, and define a future-state model aligned to the client's broader goals for efficiency, governance, and scalability. The work focused on understanding how strategy was developed, where and how the agency was engaged, what capabilities were being provided externally, and how processes, tools, governance, and communication worked today.

Through discovery, Clarkston found that the current model was strong in execution but limited by fragmented processes, inconsistent ways of working, unclear ownership, manual handoffs, and limited visibility into performance and reporting. The current model was optimized for execution reliability rather than scalability or strategic value.

The client needed a path forward that preserved the strengths of the existing model, maintained legal and regulatory rigor, and retained access to specialized expertise, while improving governance, standardization, support coverage, and data-driven decision-making. Clarkston's role was to define that recommended path across people, processes, and technology, supported by a future-state operating model, roadmap, and business case.

Consumer Products Case Study

PROJECT OVERVIEW



INDUSTRY



Consumer Products

PRODUCTS AND SERVICES



Food & Beverage

PRIMARY OBJECTIVES

- Assess the current-state marketing activation process, team structure, and third-party agency engagement across impacted functions and tactics
- Identify opportunities to improve technology enablement, efficiency, governance, strategic allocation of work, and organizational alignment
- Define a future-state operating model across people, process, and technology, including roles, responsibilities, and organizational implications
- Develop a roadmap, benefits analysis, and business case to support leadership decision-making and execution readiness

RESOLUTION

- Conducted 27 cross-functional stakeholder interviews spanning Marketing, Procurement, Legal, Finance, DX, and vendor perspectives to understand the current state, pain points, and improvement opportunities
- Assessed current-state processes, ownership, and handoffs across key activation tactics, with an initial deep dive into the three core tactics representing the majority of agency-managed activity (coupons, premiums, and contests/sweepstakes/games)
- Evaluated the transferability of work by tactic to determine which activities could be standardized, transitioned, or better governed in a revised operating model
- Synthesized findings into a case for change across people, process, governance, reporting, and execution
- Developed a North American future-state recommendation centered on clearer strategic ownership, centralized governance, improved workflow management, and more scalable execution support
- Defined future-state team charters, organizational considerations, change management needs, and an execution roadmap covering people, process, technology, legal, and training
- Built and presented a business case outlining long-term cost savings from transitioning marketing activation activities in house vs. external agency reliance
- Developed a scalable, revenue-based resourcing framework by CBU to estimate required FTE support levels under an in-house activation model

KEY BENEFITS

- Defined a scalable future-state operating model designed to reduce fragmentation and improve consistency across categories
- Clarified ownership, governance, and decision rights across business teams, centralized activation leadership, and scaled execution support
- Established a path to broaden support coverage and improve service consistency across the organization
- Recommended a tech enablement plan to improve reporting, transparency, and performance visibility to support more data-driven decisions
- Delivered a practical roadmap to support implementation readiness, including organizational alignment, process definition, training, and change enablement

KPIs

- 27 stakeholder interviews completed across cross-functional teams and vendors
- 3 core activation tactics assessed in depth as part of the current-state review
- Recommended scalable model to expand support coverage across the North American organization

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