Consumer Products Case Study

PROJECT OVERVIEW

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Developing an Indirect Sales Planning Roadmap for a Frozen Foods Manufacturer

A frozen foods manufacturer engaged Clarkston to assess the nuances of indirect sales planning (*food service, wholesalers, distributors and redistributors*) prior to an upcoming trade promotion management (TPM) implementation. Existing planning processes varied by customer and data availability, making it difficult to consistently forecast volume and manage trade investments. These challenges also limited the organization's ability to use the full capabilities of its existing TPM platform.

Clarkston conducted a four-week assessment to evaluate current-state planning processes and supporting technology, including master data. The team recommended process adjustments and technology improvements, supported by a roadmap to embed industry-leading practices for indirect sales planning within the organization and its technology.

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PROJECT OVERVIEW

INDUSTRY

Consumer Products

PRODUCTS AND SERVICES

Frozen Packaged Foods

PRIMARY OBJECTIVES

- Evaluate how indirect customers are managed today across Retail and Foodservice business units, diving into current planning processes, organizational roles, existing system design, master data, and reporting capabilities
- Identify gaps between the organization's current ways of working and leading industry practices
- Develop recommendations to better leverage today's system landscape for indirect customer planning, forecasting, and trade management
- Build a future-state roadmap that improves cross-functional collaboration and planning accuracy, supported by more effective data utilization

RESOLUTION

- Conducted stakeholder interviews and workshops to document current-state processes and identify pain points across Sales, Finance, Demand Planning, and supporting functions
- Evaluated existing system capabilities, master data design, and system configuration against industry-leading practices
- Developed future-state planning processes for Retail and Foodservice, including recommendations for forecasting, trade accruals, allocation methodologies, shipment forecasting, and financial planning
- Established system design configuration guidelines split out by universal rules, Retail-/Foodservice-specific rules, and data-driven rules
- Created customer-specific planning profiles for key indirect customers to illustrate planning, forecasting, and actualization scenarios across multiple business models
- Documented key business decisions, technology requirements, and process alternatives
- Recommended future-state approaches for indirect planning and an organizational change management (OCM) strategy

KEY BENEFITS

- Clear future-state vision for indirect sales planning, with recommendations to strengthen standardization and cross-functional alignment
- Opportunities to improve forecasting accuracy and financial visibility through adjustments made to data management
- Structured decision framework to help leadership evaluate technology, process, and organizational trade-offs before implementation

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KPIs

- 6 indirect customer profiles
- 12 key design decisions across 6 process areas
- 3 options for indirect planning methodologies with key considerations and system design detailed by option

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