

CS Trade Planning



Identify and manage win-win opportunities with trade profitability insights

CS Trade Planning, is a one-stop-shop for account managers to manage their accounts. Customisable workflows lead you through the process of setting plans, scenario modelling the forecast and, ultimately, analysing the results for future learning. CS Trade Planning will give you the control required to produce successful account plans and increase profitability.

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Trade Planning Overview

CS Trade Planning includes a suite of applications which enables our clients to model the effects on profitability of changing volume and trading terms for individual accounts.

Trade Planning Modules:

1) Account Planning and Promo Deal Evaluation

- > Account Planning and forecasting
- > Promotional Deal Evaluation and maintenance
- > Consolidation

2) Trade Profitability

- > Retailer profitability - measured by retailer and internal methods
- > Actual and Planned prices can be tracked in relation to retailer margins
- > Variance of actuals versus last year and plan
- > Measure impact on margin from volume, price, mix and % margin changes

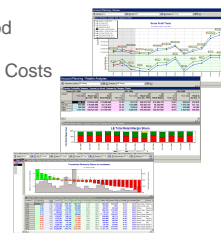
3) Promotional Evaluation

- > Pre-promotional planning
- > Assignment of Promo ID's to individual campaigns
- > Promo ID's linked to products, brands, accounts, weeks, promo characteristics (i.e. type of promo, In-store execution)

2) Trade Profitability

The **Trade Profitability module** allows the user to analyse a wide range of measures that can be tailored to match the business' requirements. Typically, these are:

- > Unit and Volume sales - EPOS and Shipments
- > Retail Sales Value
- > Retail Margin - Retail and Company method
- > Gross Sales Value
- > Contractual and Discretionary Promotional Costs
- > On-invoice and After invoice discounts
- > Net Sales Value
- > Promo Activity Details
- > Cost of Goods
- > Gross Profit
- > Promotional Types
- > Calculation of front and back margin



3) Promotional Evaluation

The **CS Promotional Evaluation tool** can be used to interrogate EPOS data and model promotional activity. Data can be imported from market data sources and account specific sales systems. Customisable views allow the user to evaluate all aspects of the promotion mechanic.

Who will benefit?

Our solution provides a mechanism for **Account Managers** to evaluate the impact of promotional activity on sales, costs and profit. All plans, forecast and actuals are automatically consolidated in a central repository so that the total impact of the individual account plans can be assessed at any level of customer, channel, brand or category. **Sales and Channel Directors** can provide a consolidated view of the business at channel and total level, evaluate performance against Budgets and Plans, and provide clear visibility of opportunities and issues.

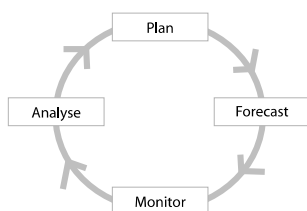
Overall, the **CS Trade Planning tool** can offer you a robust link between sales and supply chain, as well providing tighter management of your trade expenditure budget.

1) Account Planning and Promo Deal Evaluation

CS Account Planning combines actual and forecast information into a single view ensuring that the latest out turn for the year is always available. Comparisons can then be made against the plan with powerful analyses highlighting where variances are occurring. The highly interactive user interface enables the planner to react to changing environments and model different scenarios before selecting the one to be applied. The total effect on the account can be viewed ensuring that any variations to overall account targets are instantly highlighted.

Application Areas

- > Setting & monitoring current year account plans
- > Producing Next Year plans
- > Assessing the impact changing trade terms have on profitability
- > Assessing the impact of price changes on retailer margin



Generic planning cycle

Features

- > Extensive range of analytical views
- > Detailed performance analysis of accounts
- > Evaluation of promotional costs & impacts
- > Detailed profit & loss analysis
- > Top Down & Bottom Up modelling
- > Custom aggregates of product, account and time
- > Variance analysis between the plan, forecasts and actuals
- > What-if scenario planning, deal evaluation, analysis & reviews



Benefits

- > Identifies real value of opportunity gaps
- > Provides a clear understanding of what account plans will deliver to the business
- > Short term forecasts can be updated at a detailed level
- > Impact of different scenarios can be quickly evaluated
- > Plans are produced accurately at a high level
- > Provides managers and analysts with powerful 'what-if' evaluation tools for trade profitability and promotional evaluation
- > Evaluate sales, RSPs, retail profit, and internal margin performance of account which identifies opportunities
- > Understand impact on sales/profit of product mix changes



Tel: + 44 (0) 1476 570500

www.cosmic-solutions.com

Email: info@cosmic-solutions.com Fax: + 44 (0) 1476 568500

Cosmic Solutions Ltd, 6 Hill Court, Swingbridge Road, Grantham, Lincolnshire NG31 7XY United Kingdom

