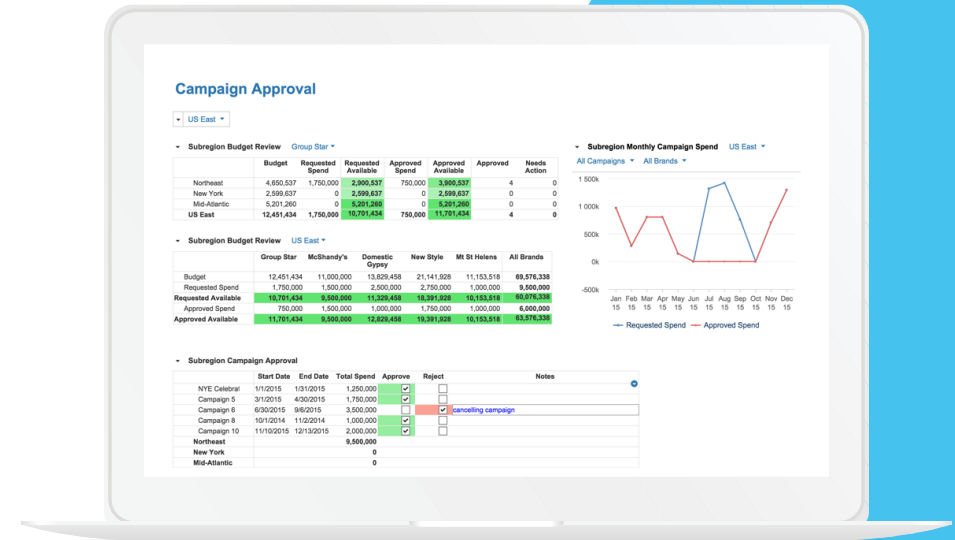# Trade Promotion Planning

The Anaplan app provides comprehensive trade promotion planning and can be used together with other planning solutions. Manage promotion budgets, collaboratively plan at aggregate and detailed levels, and easily add promotions, campaigns, and products as you plan. Empower promotion planners to adjust flexible models and calculations to match your evolving needs.

Create an optimal promotion plan. Accurately align trade promotion planning spending plans with distributor and end customer demand signals across all product, geography, and time periods with unprecedented granularity.

Enable cross-enterprise promotions alignment. Perform top-down and bottom-up trade promotion planning and analysis that incorporates P&L data—delivering actionable insight into promotions spending for different company organizations. Streamline trade promotion management workflow execution of approval tasks and tracking.

Track ROI, identify ineffective promotions. Increase trade promotion planning margins while you allocate promotions spend effectively across the enterprise by tracking promotions spend and promotion ROI across historical and actuals data.

KEY BENEFITS

- Improve promotion plan accuracy and collaboration with flexible promotion modeling and performance analysis

- Maximize trade promotion effectiveness by planning tradeoffs in lift versus trade spend

- Define optimal trade promotion strategies and budgets integrated with promotions plans in one application

- Integrate with legacy systems with pre-built connectors and APIs, including ERP, CRM, and planning systems. Link to other Anaplan apps with no data integration

- Implement in record time with a cloud-based, pre-built app that business owners can adjust over time

Client Case Study

A leading vendor of premium drinks with net sales of $13B leverages Anaplan for the complete planning lifecycle. From modeling and setting the promotions and demand plan to its execution and analysis, this company harnesses Anaplan to make strategic-level decisions that affect revenue and margin.

Benefits

- Ability to understand potential impact of promotion spend to revenue

- Functionality to measure the most effective promotions across the product catalog, geographies, and weekly intervals

Key Features

Pre-built app designed for business users Activate a purpose-built app, with built-in best practices, with one click from the Anaplan App Hub. No technical knowledge and skills required to implement, deploy, or tailor the app.

Trade promotion optimization Perform top-down spend planning by trade, consumer, and shopper. Leverage historical spending to set targets. Spread across time, based on profiles. Set funding levels by brand and customer.

Unit volume planning Use history to plan unit sells by product and banner. Select growth profiles based on historical CAGR or statistical methods. Adjust unit plan at any level. Enter a custom spread across time or leverage an existing product. View volume plan by geo, retailer, brand, and drill down as needed.

Promotion planning and analysis Enter planned promotion by banner and tactic. Select SKU to be included in the promotion. Plan spend levels and plan/ship dates for promotions. Compare promotion spending to top-down budget and funding levels. View base and lift impact by promotion.

Post-event analysis Compare with actuals from ERP, IRI, and IRI retail link system. Map data and combine into common structure and hierarchies. Determine and track ROI by promotion for actual versus plan. Assess variance on consumption, shipment, revenue, and margin.

Reporting, dashboarding, and alerting Zero-latency reports and dashboards on all demand plans, forecast KPIs, and actuals with web, mobile, Excel®, and PowerPoint® front-ends. Enable highly interactive reporting and analysis on the same view as for planning and updating promotion data. Define any alert on all data, including plan and master data changes. Drill down to transactions. Capture and report on notes, plan changes, and assumptions.

Master data maintenance   Enable end users to easily create and modify any master data in real time for new products, customers, and promotions. Drag-and-drop hierarchy changes with immediate effect. Master data update capabilities tailored to process and role-based views. Basic or form-based data entry with data validation for planners. Real-time master data changes (e.g., on promotion data or large datasets).

Data integration Get started quickly with self-service UI for data loads (import and export) by business and IT users. Centralization of master data and transaction data from source systems to multiple Anaplan apps. Pre-defined, bidirectional Anaplan connectors with MuleSoft, SnapLogic, and Boomi for hundreds of data sources, including Oracle and SAP. UI integration with Salesforce.com to facilitate your process. Programmatic integration via REST-API. Use Model Link to share plans and master data across models without ETL tools.

Top security and reduced IT costs Single, continuously monitored multi-tenant cloud platform and infrastructure. Role-based security, user management and single sign-on support. Disaster recovery and full data encryption.

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