

Trade Promotion Management application

Improve promotion ROI and strengthen your relationship and placement with retailers



Take control of your promotion planning strategy

CPG companies today face a complex landscape with challenges including increased competition, market uncertainty, rising costs, and evolving consumer behaviors. These factors put pressure on CPGs to adapt and innovate to maintain profitability and market share.

Promotions are one of the strongest levers companies have to shape consumer demand and profitability, yet they are also the second largest line item on a P&L. Despite their importance, promotions remain inefficient, error-prone, difficult to measure, and make tracking ROI a more challenging prospect. This leads to high trade spend costs, strained retailer relationships, and profitability loss.

There's a smarter way to plan

Anaplan's Trade Promotion Management application unites trade, demand, and finance in one flexible, collaborative platform that scales with global configurability. Real-time "what-if" scenarios, powered by transparent and tunable AI/ML, deliver instant margin and demand insights. With seamless integration to ERP systems, demand planning, and IBP, Anaplan empowers business users to optimize, plan, and execute promotions without relying on IT or rigid vendor workflows.

Key benefits

- **Make agile promotion decisions:** Real-time pre-event forecasting and scenario planning with transparent, tunable AI/ML models that show underlying assumptions and allow user overrides
- **Improve promotion ROI:** Leverage embedded analytics and optimizations to plan, execute, measure, and adjust in the same environment for continuous improvement
- **Increase forecast accuracy:** Use hybrid ML and business rule modeling, and embedded experimentation workflows, to improve predictions for new launches or shifting conditions
- **Align to corporate targets:** Links trade, demand, and finance in one connected model, so updates flow instantly across teams and scenarios stay aligned across plans



Key features

For CPG companies planning and executing retailer promotions, Anaplan delivers a best-in-class trade promotion platform that centralizes calendars, mechanics, funding, and approvals — and forecasts promotion-level ROI and P&L impact before you launch.

The Anaplan Trade Promotion Management application encompasses:

Trade promotion optimization

- The application uses built-in predictive modeling and advanced machine learning to forecast baseline and incremental sales volume using historical data, price elasticity, and promotional conditions — and to recommend alternative promotions.

Promotion investment management

- Manage and standardize promotional investments by tactic, and complete a full financial analysis (budget vs. plan vs. actual) at the account level via a fully configurable P&L.

Trade spend management

- The TPM app enables “checkbook management” by setting and monitoring budgets for everyday and promotion pricing across channels or segments.

Promotion planning & execution

- Draft, scenario-plan, align, and financially forecast promotional events down to the day at the customer, product, and channel levels, daily tracking of price changes.
- Review, lock, and deploy promotional events across ERP systems and retail-execution touchpoints.

Joint business planning

- Analyze the total financial impact of trade spend with retailers in their language and metrics via a configurable, dual P&L view in real time, making joint business planning seamless and mutually beneficial.

Bring your own analytics

- Unlike other point solutions, Anaplan’s TPM application offers the option to leverage Anaplan’s out-of-the-box analytics capabilities or easily integrate their own for deeper, tailored insights.

Global configurability

- Seamlessly accommodate differences in trade practices, regulations, and consumer behaviors across different markets, ensuring plans are relevant and compliant, and that global promotion spend is optimized.

Integration with demand planning

- Anaplan’s TPM application both receives a demand signal from, and sends a demand forecast (total forecast or uplift) to, Anaplan’s Demand Planning application — improving forecast accuracy and lowering the risk of stockouts or excess inventory.

The Anaplan platform offers

- **Application framework:** Rapidly deployable best practices, configurable to customer requirement, upgradeable with future releases, and extensible to other use cases through core platform capabilities.
- **Dashboards, reports, and analytics:** Visualize key supply chain and workforce data in real time through a single source of truth.
- **“What-if” scenario and multi-dimensional modeling:** Run ultra-fast calculations at scale using Anaplan’s high-performance calculation engine.
- **Collaborative and agile planning:** Plan across corporate and business units, and across functions like HR, finance, sales, marketing, and supply chain.
- **Best-in-class security and data privacy:** Includes role-based access control, SAML 2.0 SSO support, user management, and data encryption.
- **A highly extensible ecosystem:** Connect data and tools with APIs, ETL connectors, and native integrations across HR, finance, operations, data warehouses, and other systems of record.

About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

