

5 trade fund reports a CFO can't live without

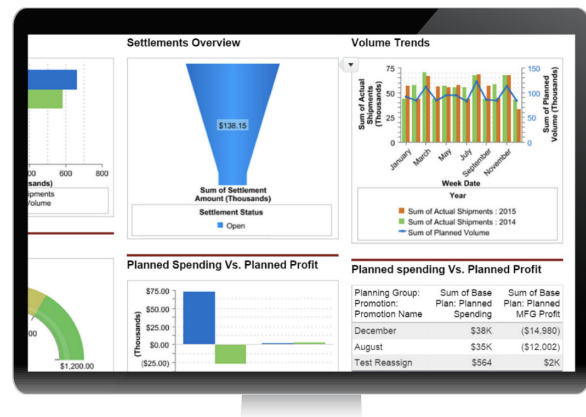
Not all Trade Promotion Management (TPM) reports are created equal. Highly-accessible analytical reports designed to accelerate insights and drive profitable decision-making are generating a new competitive advantage among Consumer Goods (CG) manufacturers.

With the right technology solution, a busy CFO can replace hours of compiling spreadsheet formulas in favor of instant business intelligence. A couple quick clicks can reveal if a promotion turned a profit or if any trade dollars were left on the table. Beyond time savings, fully automated promotional analysis reports arm CFOs with data visualization tools, drill-down forecast capabilities and top line consolidated views of the entire business.

In order to quickly and easily evaluate trade spend effectiveness and profitability, here are a core set of trade fund reports a CFO simply can't live without:

1 Accrual Report

Comparing accruals to the actual expense records generated during the deduction settlement process will enable a CFO to understand how much money is spent on promotional events. A best-in-class accrual report should provide instant insight into all G/L accrual liabilities for a given month by SKU, trade spending fund, G/L account code and account.



2 Promotion Effectiveness Report

Comparing accruals to the actual expense records generated during the deduction settlement process will enable a CFO to understand how much money is spent on promotional events. A best-in-class accrual report should provide instant insight into all G/L accrual liabilities for a given month by SKU, trade spending fund, G/L account code and account.

3 Account Profitability Report

Comparing accruals to the actual expense records generated during the deduction settlement process will enable a CFO to understand how much money is spent on promotional events. A best-in-class accrual report should provide instant insight into all G/L accrual liabilities for a given month by SKU, trade spending fund, G/L account code and account.

Planning Group: Tactic	Week		Grand Total	
	-	Q2 CY2016		
ature	Sum of Total Settled	\$220,018.42	\$0.00	\$220,018.42
	Sum of Actual Units	7,930,693.00	0.00	7,930,693.00
	Sum of Planned Volume	6,329,438.52	0.00	6,329,438.52
	Sum of POS Sales	7,561,553.00	0.00	7,561,553.00
	Sum of Planned Spending	\$1,246,309.86	\$0.00	\$1,246,309.86
	Sum of Planned MFG Profit	\$3,916,769.69	\$0.00	\$3,916,769.69
ature	Sum of Total Settled	\$0.00	\$0.00	\$0.00
	Sum of Actual Units	0.00	137,509.00	137,509.00
	Sum of Planned Volume	0.00	209,083.79	209,083.79
	Sum of POS Sales	0.00	127,406.00	127,406.00
	Sum of Planned Spending	\$0.00	\$97,067.86	\$97,067.86
	Sum of Planned MFG Profit	\$0.00	(\$5,446.33)	(\$5,446.33)
isplay	Sum of Total Settled	\$0.00	\$10,123.75	\$10,123.75
	Sum of Actual Units	0.00	209,427.00	209,427.00
	Sum of Planned Volume	0.00	325,810.56	325,810.56
	Sum of POS Sales	0.00	204,273.00	204,273.00
	Sum of Planned Spending	\$0.00	\$145,908.18	\$145,908.18
	Sum of Planned MFG Profit	\$0.00	(\$6,090.15)	(\$6,090.15)
ature+Display	Sum of Total Settled	\$0.00	\$10,123.75	\$10,123.75
	Sum of Actual Units	0.00	40,495.00	40,495.00
	Sum of Planned Volume	0.00	84,330.40	84,330.40
	Sum of POS Sales	0.00	39,538.00	39,538.00
	Sum of Planned Spending	\$0.00	\$87,297.84	\$87,297.84
	Sum of Planned MFG Profit	\$0.00	(\$35,918.97)	(\$35,918.97)
R	Sum of Total Settled	\$0.00	\$4,475.00	\$4,475.00
	Sum of Actual Units	0.00	22,375.00	22,375.00
	Sum of Planned Volume	0.00	33,075.10	33,075.10
	Sum of POS Sales	0.00	23,806.00	23,806.00
	Sum of Planned Spending	\$0.00	\$33,075.10	\$33,075.10
	Sum of Planned MFG Profit	\$0.00	\$26,129.32	\$26,129.32
ta Acquisition	Sum of Total Settled	\$0.00	\$10,123.75	\$10,123.75
	Sum of Actual Units	0.00	202,944.00	202,944.00
	Sum of Planned Volume	0.00	261,141.79	261,141.79
	Sum of POS Sales	0.00	192,498.00	192,498.00
	Sum of Planned Spending	\$0.00	\$176,329.33	\$176,329.33

4 Promotion Settlement Report

Gaining visibility into the actual settlements paid against each promotional event provides a clear line of sight to the dollar amount spent and the number of events that took place. This report also allows a CFO to understand and track which funds were utilized to settle each promotional event.

5 Tactic Settlements Recap Report

Reviewing actual spending, sales volume and profitability against various tactic types such as features, displays, TPRs, in-store demonstrations and even unsaleables equips a CFO with the foresight to analyze profits being generated by each tactic. This knowledge will help the CFO, and the sales team, determine which promotional strategies are building sales and profitability and which tactics are not.

The process of generating meaningful financial reports should take minutes, not hours. Even though standardized reporting is baked into most of today's TPM solutions, the most valuable reports are the ones that are effortless to create, simple to slice and dice and easy to access from the office or on the road.

About CPGvision

In developing the CPGvision platform, PSignite offers the premier revenue growth management (RGM) solution designed to help consumer goods companies grow revenue profitably. The CPGvision solution suite features trade promotion management (TPM), trade promotion optimization (TPO), annual planning (AOP), as well as price elasticity and scenario planning capabilities. PSignite prides itself on delivering the most powerful combination of functionality and ease of use, enabling clients to realize benefits from day one.

To learn more about our ready-to-use trade promotion intelligence, TPx and RGM capabilities, [get in touch](#) with our team.