CPGvision

Preparing for implementation

Contents

Section 1: Welcome to CPGvision!

Purpose of this document

The purpose of this document is to enable us to have as a productive implementation process as possible by coordinating an understanding of the data structure that CPGvision is built on. This document will address the following data components:

1. Data Required for Setup
   a. Account Structure
   b. Product Structure
   c. Price
   d. Actual data – Sell-in, Sell-through, Sell-out

General Advice

When thinking about master data, start with the reporting needs of your stakeholders. Sales, Finance, Management. If you need to report by PPG, build this in up front. If you report in brand, make sure all items are coded to your brands properly. If your sales management needs to roll up sales regions, ensure that your planning accounts are mapped accordingly.
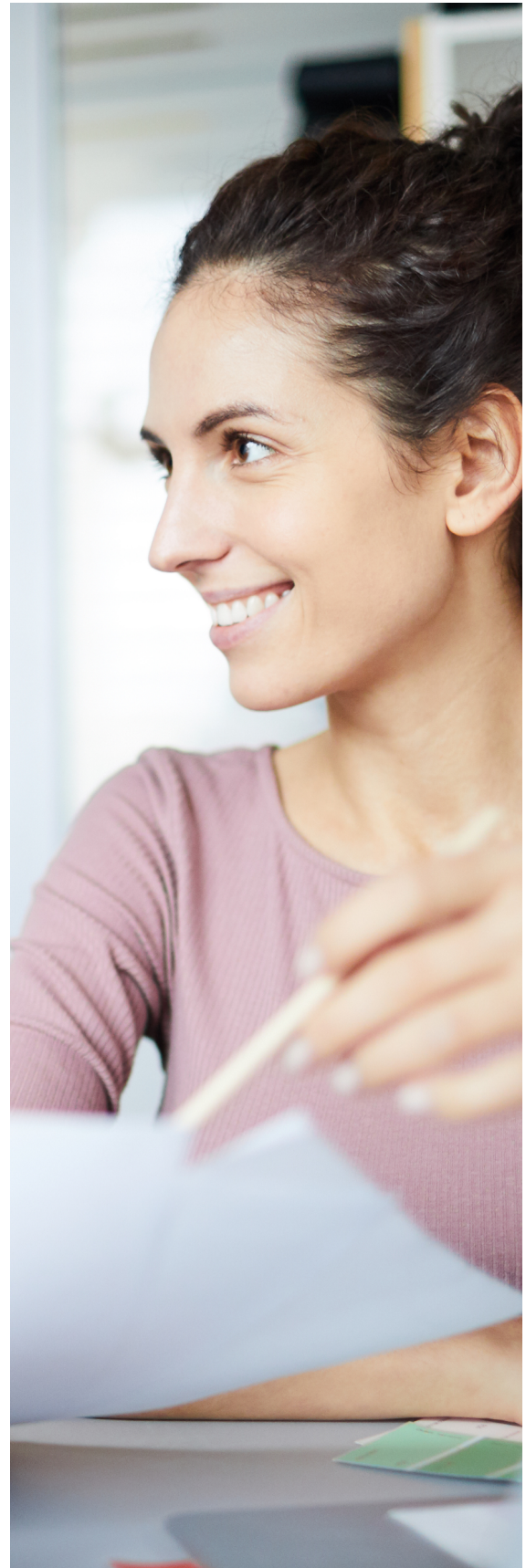
Section 2: Master Data - Accounts

To prepare the Account structure in CPGvision, we will need the following:

Account Hierarchy

What are your planning accounts? What is your account rollup hierarchy? What account mapping information do we need to map across data sources?

Sample Account Hierarchy

Sample Account Hierarchy (note, you may not have all these fields, you may have others).

Parent.Name	Name	Reporting Account c	CTTPM2012 Class of Trade c	IRI Name (To map to POS data)	KeHe Name (to Map to KeHe SPIN)	UNFI Name (to Map to UNFI Spin)	Account Owner	Sales Region
KeHE HQ	Acme	KeHE HQ	Food	AlbertsonsCo Acme-RMA - Food	ACME		Jane Doe	East
KeHE HQ	Albertsons - Denver	KeHE HQ	Food	AlbertsonsCo Denver Div-RMA - Food	DENVER		John Smith	West
KeHE HQ	Albertsons - Eastern	KeHE HQ	Food	AlbertsonsCo Eastern-RMA - Food	EASTERN		Jane Doe	East
KeHE HQ	Albertsons - Jewel	KeHE HQ	Food	AlbertsonsCo Jewel Div-RMA - Food	JEWEL		Carol Jones	Central
KeHE HQ	Albertsons - NorCal	KeHE HQ	Food	AlbertsonsCo NorCal Div-RMA - Food	NORTHERN CAL		John Smith	West
KeHE HQ	Albertsons - Portland	KeHE HQ	Food	AlbertsonsCo Portland Div-RMA - Food	PORTLAND		John Smith	West
KeHE HQ	Albertsons - Seattle	KeHE HQ	Food	AlbertsonsCo Seattle Div w/ Alaska-RMA - Food	SEATTLE		John Smith	West
KeHE HQ	Albertsons - Shaw's	KeHE HQ	Food	AlbertsonsCo Shaws Div w/ SM-RMA - Food	SHAWS		Jane Doe	East
KeHE HQ	Albertsons - SoCal	KeHE HQ	Food	AlbertsonsCo SoCal Div-RMA - Food	SOUTHERN CAL		John Smith	West
KeHE HQ	Albertsons - Southern	KeHE HQ	Food	AlbertsonsCo Southern Div-RMA - Food	SOUTHERN		Carol Jones	Central
KeHE HQ	Albertsons - SW (Phoenix)	KeHE HQ	Food	AlbertsonsCo Southwest Div-RMA - Food	SOUTHWEST		Carol Jones	Central
KeHE HQ	Albertsons - United	KeHE HQ	Food	AlbertsonsCo United Div-RMA - Food	UNITED		John Smith	West
KeHE HQ	Albertsons IM - Boise	KeHE HQ	Food	AlbertsonsCo IM Div w/out SLC-RMA - Food	INTERMOUNTAIN		John Smith	West
KeHE HQ	INFRA	KeHE HQ	Food		INFRA	INFRA ATLANTIC- ALL OTHER	Bill Brown	National Accounts

Managing Indirects

Utilizing indirect accounts as planning accounts has pros and cons. Managing indirects allows you to plan close to the shopper – where your trade spend has more of an impact. This is typically where there is a wealth of data as well, adding significant strength to your post-event analytics. It is, however, a bit more complicated to set up and roll up plans as well as properly account for accruals.

If your planning accounts include indirect customers we will need to map out that relationship as well. A typical setup includes the mapping of each indirect (child account) to its distributor (parent account). You will want to identify indirect PLANNING accounts, often smaller indirects are grouped together into one bucked (All Other KeHe for example).

General Advice

"Messy data" can be a source of significant implementation delay. Prior to kickoff, download your Account hierarchy from your ERP. Clean up anything you don't want moved over to your TPM. Make sure all key stakeholders agree to the final hierarchy that will be loaded into TPM. This will eliminate the need to clean up your TPM before you even go-live!

Section 3: Master Data - Products

To prepare the Product structure in CPGvision, we will need the following:

Product Hierarchy

What product structure are we putting in place – Business Unit, Brand, Other classifications? What product mapping information do we need to map products across data sources?

Sample Account Hierarchy

Sample Product Hierarchy (note, you may not have all these fields, you may have others)

Business Unit	Brand	Product ID (Client internal for mapping to Shipment data	Type	Size	Flavor
Company Business Unit 1	K-Cup	2020	Dark Roast	6 Count	French
Company Business Unit 1	K-Cup	2022	Dark Roast	12 Count	French
Company Business Unit 1	K-Cup	2023	Dark Roast	24 Count	French
Company Business Unit 1	K-Cup	2024	Medium Roast	6 Count	Breakfast
Company Business Unit 1	K-Cup	2025	Medium Roast	12 Count	Breakfast
Company Business Unit 1	K-Cup	2026	Medium Roast	24 Count	Breakfast
Company Business Unit 1	Grinds	2027	Dark Roast	1LB	French
Company Business Unit 1	Grinds	2028	Dark Roast	1LB	Vienese
Company Business Unit 1	Grinds	2029	Dark Roast	1LB	Italian Espresso
Company Business Unit 1	Grinds	2030	Medium Roast	1LB	Breakfast
Company Business Unit 1	Grinds	2031	Medium Roast	1LB	Special

POS (column for each type - IRI/Nielsen/Retailer direct) Product Name (for data mapping)	POS UPC (10, 11, 13 digit) for data mapping	Distributor Product Name (for mapping to Distributor SPIN)	Distributor UPC (for mapping to Distributor SPIN)	Case Pack	COGs
KCUP FRST 6CT - 0072248213041	0072248213041	Dark Roast 6 Count	0072248213041	12	1.33
KCUP FRST 12CT - 0072248213041	0072248213041	Dark Roast 12 Count	0072248213041	12	1.451
KCUP FRST 24CT - 0072248213041	0072248213041	Dark Roast 24 Count	0072248213041	12	1.47875
KCUP BRFST 6CT - 0072248213041	0072248213041	Medium Roast 6 Count	0072248213041	12	1.474375
KCUP BRFST 12CT - 0072248213041	0072248213041	Medium Roast 12 Count	0072248213041	12	1.41
KCUP BRFST 24CT - 0072248213041	0072248213041	Medium Roast 24 Count	0072248213041	12	
GRIND FRRST 16OZ - 07223829271	- 07223829271	Dark Roast 1LB	- 07223829271	12	1.39125
GRIND VIEN 16OZ - 07223829271	- 07223829271	Dark Roast 1LB	- 07223829271	12	1.4875
GRIND ITAL 16OZ - 07223829271	- 07223829271	Dark Roast 1LB	- 07223829271	12	
GRIND BRFSTRST 16OZ - 07223829271	- 07223829271	Medium Roast 1LB	- 07223829271	12	1.47875
GRIND SPCL 16OZ - 07223829271	- 07223829271	Medium Roast 1LB	- 07223829271	12	1.41

General Advice

"Messy data" can be a source of significant implementation delay. Prior to kickoff, download your Product hierarchy from your ERP. Clean up anything you don't want moved over to your TPM. You may need to keep products that have recently been deactivated to ensure historical trends, but if a product hasn't been sold in the last two years don't load it into your new TPM! Make sure all key stakeholders agree to the final hierarchy that will be loaded into TPM.

Section 4: Master Data - Price

Price records

List price is a key requirement of many calculations in TPM. Best practice is to take advantage of our date range capabilities for all pricing and COGs information. Often list price is standard across all accounts, although for some clients list price is account specific. Please be prepared to come to the table with list pricing early in the process.

Section 5: Actual Data for Initial Setup

Your actual data can provide a wealth of valuable information for implementation, preparing your data for both setup and integration can give you a big jump-start on the implementation process. Remember:

- We integrate data at the Account/SKU/Week level, so all data should be run by customer, by SKU by Week, where possible.
- Typically, minimum of 2 years (3 years preferred if modeling base and lift) of historical data is loaded in implementation.
- Typically actuals are integrated through the ERP system, we provide a variety of options for other data sources (IRI or Nielsen POS, Retailer Portals, Distributor Spin etc.).

Data sources to gather:

- Sell-in (Shipment) from your ERP
- Sell-through (Distributor Spin)
- Sell-out (POS, IRI Nielsen or Customer) – If you are purchasing total, base and incremental – units and dollars, causal data, pricing, and distribution. we find that loading these measures on an ongoing basis provides a richness of post-event analysis.
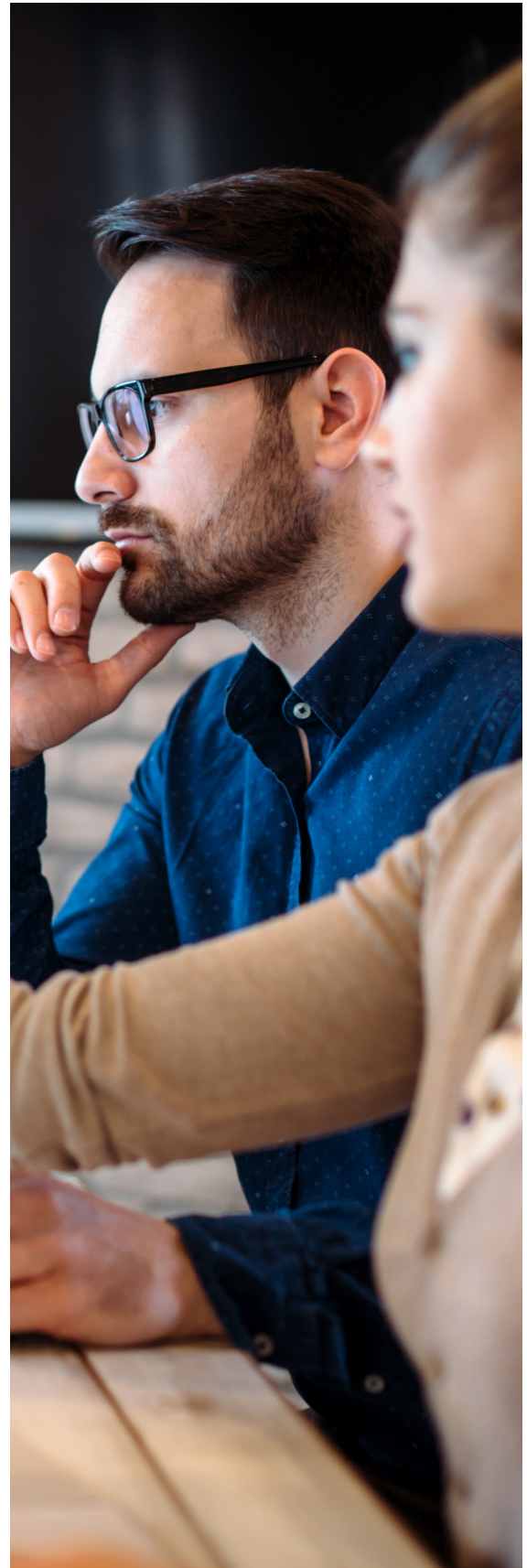
Data requirements for base lift modeling, PE, optimization

General requirements:

1. At least 2 years of historical sales (recommended: 3 year or more), Account, item, week level.
2. Sell-out data for all accounts where it is available, at least one account.
3. Any feature which is not in the table below but could be useful in sales prediction can be added.
4. If ACVs are not available, then historical promo data can be used. However, ACVs data is strongly recommended.
5. If causal ACV measures are not available (e.g., feature, display) models can be estimated but uplift for these tactics won't be calculated, information can be obtained from historical plans, but execution dates must be validated by client.

Sell out	Manditory	Sell-through & sell-in	Manditory
Date (week_end, week_start or exact date for daily data)	Yes	Date (week_end, week_start or exact date for daily data)	Yes
Units	Yes	Volume	Yes
Retail Dollar Sales	Yes	Sales	No
Average Price per unit (it can be calculated based on volume and sales)	Yes	Price per unit	No
Everyday shelf price	No	Everyday shelf price - current	Yes for PE
List Price	Yes for PE	List Price - current	Yes for PE
COGS - current	Yes for PE	COGS - current	Yes for PE
Everyday shelf price - historical	No	Everyday shelf price - historical	No
List Price - historical	No, recommended for PE	List Price - historical	No
COGS - historical	No	COGS - historical	No
ACV weighted distribution or total points of distribution	Yes	Product name	Yes

Sell out	Manditory	Sell-through & sell-in	Manditory
ACV feature	Yes	Account name	Yes
ACV display	Yes	Brand name	Yes
ACV price reduction (TPR)	Yes	Sub-brand name	No
ACV feature and display	Yes	Category name	No
Any other available ACV	No	Sub-category name	No
Product name	Yes	Historical promotion names	No
Account name	Yes	Historical promotion sell-out start date	No
Brand name	Yes	Historical promotion sell-out end date	No
Sub-brand name	No	Historical promotion tactic	No
Category name	No	Historical promotion marketing	No
Sub-category name	No	Historical promotion causal (strategy)	No
Historical promotion names	No	Historical promotion Merchandising quantity	No
Historical promotion sell-out start date	No	Historical promotion causal (strategy)	No
Historical promotion sell-out end date	No	Historical promotion Merchandising quantity	No
Historical promotion tactic	No	Historical promotion products assigned	No

Sell out	Manditory	Sell-through & sell-in	Manditory
Historical promotion marketing	No	Historical promotion products assigned	No
Historical promotion causal (strategy)	No	Historical promotion account assigned	No
Historical promotion Merchandising quantity	No	Historical promotion price/ discount	No
Historical promotion products assigned	No		No
Historical promotion account assigned	No		No