

How sophisticated is your level of OPTIMIZATION?

Determine your optimization sophistication level



Which level are you?

1

ENTRY

UNDER \$1B

in annual revenue

20-30%

of gross is trade spend

need a clear understanding of base and incremental lift for each merchandising condition

need trade efficiency

third position in category or less

2

INTERMEDIATE

\$1B-\$5B

in annual revenue

30-35%

of gross is trade spend

have a clear understanding of base and incremental lift for each merchandising condition

have improved trade efficiency using pre- and post-event analysis into RGM

3

ADVANCED

\$5B & GREATER

in annual revenue

30-40%

of gross is trade spend

have a clear understanding of base and incremental lift

can deliver trade efficiency using pre- and post-event analysis

forecast accuracy for volume accruals based on accurate lift indexes

have identified "what-if" scenarios needed to deliver a plan

are a category leader

are influential with retail partners

ENTRY LEVEL

What are you challenged by?

struggle to understand base customer

always on promotion or deal

have multiple overlapping merchandising conditions

lack of available/affordable POS data



The fact of the matter is...

77%

already have a transactional capability and are ready to evolve to this level

40%

want to deploy transactional capability in the next 12 months

34%

want to deploy pre- and post-event trade analytics in the next 12 months

INTERMEDIATE LEVEL

What are you challenged by?

need "what-if" scenario planning using a combination of frequency, depth, product mix and merchandising mix



The fact of the matter is...

38%

are already using "what-if" scenario planning

42%

of manufacturers want to deploy "what-if" scenario planning in the next 12 months

55%

are using pre- and post-event trade analytics

ADVANCED LEVEL

What are you challenged by?

have constraints beyond trade such as COGs, supply chain challenges and growth priorities



The fact of the matter is...

33%

are using RGM specific capabilities

26%

want to deploy RGM specific capabilities in the next 12 months

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ENTRY

INTERMEDIATE

ADVANCED

Source: POI 2022 survey

info@vistex.com | www.vistex.com

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