

## CASE STUDY

# Centralizing Trade Promotion Insight to Support Margin Management



## Introduction:

In consumer packaged goods (CPG), trade promotions are where strategy meets spend and often where profitability quietly leaks away. As global CPG leaders increase their investments in promotions, the complexity of channels, markets, and product portfolios has outgrown traditional spreadsheet and slide-based approaches.

Zemoso partnered with a global supply chain unicorn to help realize their vision of a Revenue Growth Management (RGM) for promotions building a multi-tenant Trade and Promotion Management (TPM) layer that shifts teams from static planning to continuous, data-driven decision-making.



## Industry challenge:

CPG companies are spending up to 20% of gross revenue, yet seeing limited visibility into what truly works.

- **Disconnected planning:** Commercial promotion plans are often decoupled from core supply chain and financial planning, making it hard to see the true impact on P&L and service levels.
- **Siloed data, static views:** Promotion data sits fragmented across ERP, CRM, Excel, and local trackers making cross-channel, cross-market views slow and manual.
- **Lagging insight, reactive decisions:** By the time quarterly reviews or post-event analyses are complete, the next wave of promotions is already underway based on incomplete feedback.



## Zemoso's partnership challenge

Zemoso set out to solve a specific, systemic bottleneck: the lack of a unified, operationally usable layer for trade promotions inside the client's planning ecosystem.

The current state across CPG organizations typically looked like:

- **Bulky planning workflows:** Promotion plans stitched together from templates, emails, and spreadsheets that varied by team, region, and channel.
- **Fragmented systems of record:** Historical performance spread across ERP, CRM, OEM portals, and legacy databases, with no easy way to reconcile or trust a single view.
- **Inconsistent evaluation standards:** Each team defined "success" differently, making cross-market comparisons and ROI conversations challenging and slow.



## Impact created

The TPM solution transformed trade promotion planning from spreadsheet-heavy, channel-siloed workflows into a single, interactive Digital Brain layer for real-time visibility, scenario planning, and post-event analysis.



## How did we do this?

Zemoso and the client co-engineered a TPM dashboard application that lives within the broader planning platform connecting planning, execution, and analysis in one experience.

- **Swimlane layout algorithm:** A custom backend swimlane algorithm arranges events within the visible area to maximize clarity and avoid visual clutter optimized to be simple to compute and easy to maintain.
- **Unified data foundation:** The TPM layer integrates with ERP and CRM systems to ingest historical sales, promotion events, product hierarchies, and customer data into a single analytical model.
- **Multi-dimensional slicing:** Used a star-schema data model so that events and outcomes can be sliced across: Products and brand groups, channels (off-premise, on-premise, modern trade, etc.), markets and regions, time windows and campaign periods.
- **Efficient event search & navigation:** An optimized search capability lets users quickly locate events across a "virtual canvas" of promotions, even when the underlying dataset spans multiple markets and years.



## How did Zemoso deliver excellence

Through this TPM initiative, Zemoso helped a global supply chain and planning platform evolve trade promotion management from fragmented, retrospective reporting into a connected, forward-looking capability.

By combining calendar-based visualization and multi-dimensional analytics, the solution gave marketing and supply chain teams a single view of promotions, created a foundation for revenue forecasting and P&L planning, and turned promotion data into a live lever for Revenue Growth Management.