Outlook & prognosis: The Accenture Cloud TPM product that is being delivered is exceptional. Given the strong usability and underlying industry expertise of the broader organization, it will be a viable option for organizations that are willing to pay more for the exceptional service and TPx capabilities. Accenture has the opportunity to lead Enterprise Planning Strategy from AOP top down planning through the supply chain process. The Accenture Cloud platform drives cost-efficient implementations as there is no additional integration required. Infrastructure, run-ops, support, and license all as part of a single per-user, per-month fee. It has a high degree of configurability and requires less time and cost in customization when compared to on-prem platforms like Accenture's historical CAS system.

Consider Accenture when: You seek global capabilities for proven solutions that have global reach, but local expertise, and also when you seek a superior user experience that has not waned over 20+ years.

Avoid Accenture if: No reason to avoid Accenture.

Distinctions: POI Best-in-Class for Desktop TPx UX, HQ Analytics/Insight, Internal Collaboration, Dashboard, and Calendar.

Acumen Commercial Insights Ltd acumenci.com

Profile: A UK-based firm combining consulting services, outsourcing of key business processes, and TPx software for the last 14 years.

Geographic presence: North America (1%), Latin America (4%), Europe (60%), AsiaPac (35%).

Total consumer goods users (seats): 1,600.

Tiers represented: All.

Solution offerings: TPx, implementation and support services.

Major product sub-segments not covered: Tobacco, Semi-durables (footwear, apparel, furnishings, etc.), and consumer durables (consumer electronics, appliances, etc.).

Data Management: Acumen supports data management and cleansing extensively during implementation and offers additional service post implementation. In addition to the data management platform, Acumen has additional controls such as data validation dashboards and alerts that notify Acumen and clients (when required) of data quality issues. Data validation is built directly into the user interface, to give users confidence in the system, and wherever possible, they try to show end users where their numbers have come from and highlight any issues (such as missing list prices, where a product hasn't been listed in a customer before).

Analytics: Acumen is first and foremost a services firm. Historically each client would receive 8-10 standard reports and Acumen teams would build out the remainder of the reports based on specific client needs. Analytics has migrated to Microsoft Power BI, which gives users the option to create their own reports and also configure their dashboards. Acumen support is at the ready, but the flexibility is mutually advantageous. The dashboard is tile-based and created to drive user action, which we like. From there the user has the ability to drill into the details to see graphics as well as see the data and analytics. We really like the Action Dashboard. This area features a combination of tiles and menu ribbons and is highly configurable. It has a leading flow that directs the user in exploration and investigation. While Acumen offers

flexibility in reporting, they are also focused on optimizing the promotion management process and helping clients develop "focused reporting" to answer the most important business questions. They work with clients to build new processes and guidelines for teams to drive insights out of the promotion learning. The tool has good capabilities for identifying underperforming promotions graphically and then drilling into the details utilizing the lasso feature. Additionally, we like the mechanic optimization charts. This set of analytics analyzes promotions and optimizes for profit, allowing the user to determine optimal price points. We see this as a key tool for HQ promotion guideline development. On the settlement side, there are also nice visualizations of data, including the graphical ability to look at claims and their aging; again, intended to drive action. New this year is the ability to model different exchange rate scenarios which is also very useful for multinational clients. Also new this year is the ability to record true long-term agreements.

We find the "nearest neighbor" model capability helpful in predicting lift. It can grab a similar promotion that has previously run as a proxy for an outcome if not enough data is available for the machine learning to actually determine an outcome.

RGM Analytics: Acumen is continuing to build out a revenue management platform focused on answering the right questions at the right time for their clients: trade terms optimization and structured pricing modules, mix management and pack/price architecture modules, and promotion activity and plan optimization modules. They do have RGM trade analytics, including solid P&L views for analysis and driving internal and external JCBP conversations. Geographic analysis and benchmarking of multinational client's revenue management performance across markets allows central global revenue managers to focus on specific market challenges. This ensures assistance is prioritized in the areas of greatest need and issues. They are working to build out an expanded set of pricing and assortment analytics to complete the full RGM suite.

Technology architecture/delivery options: Private cloud.

Configuration/Customization: It is configurable, but customization that would take a client out of the upgrade path is not an option. Client requests are evaluated and considered for inclusion in the roadmap.

Service partners that have deployed in the past: Acumen does all of its own deployments.

Service partners that are able to deploy but have not yet done so: Not applicable.

Technology partners: Microsoft Azure (hosting), Microsoft for PowerBI, Telerik, RippleRock, Nfocus, LifeLineIT, Mongo, HeadforCloud, CN Group, Vitamin C Ltd (primarily IT support and security consulting).

User experience: The solution continues to improve significantly and has flexibility as embedded Microsoft PowerBI is used for powerful yet lightweight self-service reporting and analytics. The system is graphical, visual, and ergonomic. The setup of the system is intended to drive "action" and base the flow on logical action steps that a user needs to take. We have historically liked the stepwise workflows that guide the user through the process, and yet Acumen continues to leverage feedback from their users to hone and improve the experience. The calendar has unique ways to analyze events based on P&L metrics (e.g. profit, ROI) and uses detailed hovers to reflect promotion details. We really like the look and usability of the calendar, especially as scenarios are built and added to it to create an optimized plan. There is color coding to guide the user to action through the steps of scenario planning and approving a promotion plan. We found this to be a unique way of presenting workflow. The filtering functionality is very nice, giving the ability to view the promotional calendar through the lens

of set ROI objectives. Users can also create customer agreements (trading terms) in even more flexible ways to more closely match the retailer commercial agreement. There is a Sales Accounting module available that enables the matching of promotions/investments/accruals to invoicing. It is very visual and intuitive, also leveraging the calendar format. Acumen continues to advance performance improvements so the TPM and speed of analytics and reporting is at the highest levels for those clients with more robust product/promotion combinations. They gain continual data-driven feedback through satisfaction surveys users complete in the planning system. Acumen's focus is on the "specific" customer experience and offers a service/ capabilities combination that drives a satisfying user experience. The user isn't left with a robust tool that they don't know how to utilize.

Select TPx Capabilities:

Baselines: Acumen leverages two approaches to Baselines: (1) They have developed a proprietary algorithm which identifies a base in market price at any point in time which is used to identify base volume days/weeks. This creates a moving baseline which is then used to forward forecast applying any relevant in market seasonality curves (typically at a category level); (2) they use client specific machine learning models (which they develop) to forecast volumes at a given date/time for a given product at a given price in a given customer. They refresh these algorithms with clients at an agreed cadence to ensure the models are still robust. While each client/category has their own model, they frequently end up using boosted decision tree/linear regression models.

Vendor trend: Acumen is a global, specialized firm. Its current focus is on client retention and as a result it achieves modest growth year-over-year. It is demonstrating the ability to be nimble as evidenced by the improvements in analytics and UX.

Strengths: We find Acumen to be special in the marketplace because of its ability to provide consulting, implementation, ongoing support services, and software from a single source. This is highly desirable for a company seeking TPx but having difficulty moving off of spreadsheets. We also find the "concierge" model around creating reports, cleansing and managing downstream data, and providing analytical services to be appealing to companies that prefer a high touch model. The solution has a strong financial orientation and, as it advances its RGM suite, it will become even more powerful. Acumen has the services and capabilities required to assist clients with establishing an RGM practice.

Challenges: We don't see Acumen facing significant challenges beyond the dynamics of supporting a client base in multiple geographies with a high touch model out of offices in the U.K. and Singapore. Note that the working remote transition due to COVID-19 has mitigated this challenge substantially as teams have learned to adapt to remote implementations well. It is a company that is content to be focused on providing broad services to clients looking for the same. It faces less competition in Europe than a similar firm would face in another major market like the U.S.

Adjacent offerings: POS data management and data cleansing, demand planning, price management, trade terms re-engineering, and consultancy.

Key differentiators: In addition to the combination of product and services from start-up through maturity already mentioned, we found that the solution has an extraordinary ability to capture tribal wisdom by annotating objectives, variances, learnings, and general comments throughout the system. In the computer age such things are often eschewed because they aren't quantifiable or easily searchable. However, we find that capturing the "why" behind a result or a change to an entry is very important to help managers understand the rationale as

well as to help someone taking over an account relationship due to turnover. Perhaps more important is the ability to capture insights with commentary. We wish that other vendors would follow suit.

Finally, the depth of engagement through a suite of services is quite compelling and detailed to ensure that people understand and utilize the solution. Change management is critical in TPx and the Acumen team includes it with every project and does it well. The depth of the curriculum and feedback loops with users are quite impressive. Also, the ability to benchmark with other clients within a set of processes aids along the journey.

Outlook & prognosis: We believe that Acumen will remain a specialized company that caters to companies desiring services and solutions in a high touch model. The migration to Microsoft Power BI lowers TCO and provides more flexibility for the client. Building in predictive models as more of an out-of-the-box offering will be critical to gaining momentum.

Consider Acumen when: You need help getting started on the TPx journey across multiple geographies, want to augment your staff with a capable partner, or desire to establish an effective RGM practice. Also consider if you want to tailor a support and services package that is just right for you. Acumen is more oriented to being a consulting and services firm first and TPx solution provider second.

Avoid Acumen if: You simply want a TPx solution that you can maintain and control internally.

Distinctions: POI Best-in-Class for Desktop UX, Field Analytics & Insights, and Internal Collaboration.

Blacksmith Applications blacksmithapplications.com

Profile: Blacksmith Applications is a provider of software solutions and consulting services focused on Consumer Goods companies for both branded CPG and Foodservice channels. The suite of technology solutions includes Trade Promotion Management (TPM), Trade Promotion Optimization (TPO), and Analytics offerings for both the retail channels and foodservice channels of the manufacturers' business.

Geographic presence: North America 100%.

Total consumer goods users (seats): TPM 900+; TPO (Includes ROI) 831.

Tiers represented: All.

Solution offerings: TPx.

Major product sub-segments not covered: Tobacco, semi-durable and durable consumer goods.

Data Management: Blacksmith provides data cleansing and management services as part of implementation. This data includes consumption, promotion spending, shipment, DSD data, and COGS. Blacksmith carries the weight of the initial data work and partners with the client to establish ongoing data governance best practices. The system does the heavy lifting and cleansing of the data, aligning promotion shifts and outliers. This keeps it simple for the user while enhancing accuracy. The data management associated with a project is included in the project cost.