

TRADING PARTNER COLLABORATION

Joint Business Planning for a Beverage Manufacturer

A Boardwalktech Case Study

PROBLEM STATEMENT

Manufacturers who deliver products through channels to market face significant challenges when trying to match supply and demand.

It's even harder when working with perishable products, facing strong competition, and/or selling to promotion-sensitive consumers. This gap between manufacturer and trading partner means revenues, margins, and customer satisfaction all suffer.

Until now, manufacturers have tried to close this gap by building portals for their trading partners or enhancing their EDI exchange. However, by the time the portal is configured and the data exchange is cleaned up, things need to change and these systems are not flexible. Plus, users don't like it— they want to work offline. So, this means most companies are manually collaborating by emailing spreadsheets back and forth which means:

CHALLENGES

- ✓ While spreadsheets are ideal for defining a complex business process, they are hard to maintain & update for multiple users
- ✓ Manual consolidation through cutting & pasting is error prone and does not scale
- ✓ There's no effective way to analyze changes or develop reports— users are always chasing the latest updates

A multi-billion dollar beverage manufacturer was looking for a solution which could help them close this gap and proactively manage the joint business plans with its largest trading partners.

THE SOLUTION

The Boardwalk Digital Ledger (Boardwalk) is used to collaboratively manage promotions, pricing, volume, and mix planning between trading partners within a familiar desktop environment. Using Boardwalk, this customer was able to integrate actuals data from their ERP, POS data from the retailer, and collaborative joint business plan data into one environment that works seamlessly across firewalls.

Since deploying Boardwalk, this customer has seen significant business benefits:

- ✓ More time for planning; tedious and error-prone manual steps have been eliminated freeing up planners to proactively manage the joint business plan
- ✓ An integrated process; master product data is managed alongside the collaborative plan data meaning new products and product/mix changes are handled quickly and easily
- ✓ The ability to move planning from a monthly to weekly cadence
- ✓ Increased margins 6% and revenue \$24M with key retailer

Traditionally, lots of work is done to fix the data that comes from multiple trading partners so both parties can see where they've been.

Now using Boardwalk, this customer is able to proactively develop and adjust joint business plans with key trading partners which can have a significant impact on their bottom line.

BENEFITS

- ✓ Complex and disparate data environments are easily bridged and maintained between trading partners
- ✓ New products and promotions can be rapidly incorporated meaning business planning can happen more quickly and frequently
- ✓ Productivity and visibility increase since cutting & pasting, email, and shared drives are eliminated—there's a single version of the truth for the joint business plan process
- ✓ Flexible data modeling environment means multiple trade spend funding models can be accommodated and adjusted
- ✓ All users/trading partners only see their planning within legacy tools on the desktop so the process is securely managed across all participants
- ✓ Unique calculations for retailers to arrive at their internal gross and net margin figures are easily accommodated and changeable
- ✓ Powerful "what-if" scenario planning is leveraged by all users and the resulting plan is shared with the click of a mouse