



Promotion Optimization Institute, LLC

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# POI TPx Vendor Panorama 2019

## Key Strategic Insights

Some of the most important takeaways from this year's compilation of POI research are as follows:

**Holistic Planning:** Many retailers and manufacturers are continuing to organizationally structure themselves based on old paradigms. Our number one focus is the consumer, and yet roles, processes, and systems are still internally focused, not optimal and, in many cases, broken.

*When duplicative work effort is exerted across the organization it hinders obtaining the "one version of the truth" companies desire.*

There are numerous common denominators across an organization's work load: Pricing and lift coefficients, baselines, incremental, depth of discount, mix, etc. Take a moment and think about your teams, consultants, and tools that enable the analysis and work in each of the silos.

There is duplicative effort and cost associated with the siloed approach. It is not unusual for organizations to have consultants developing pricing coefficients and elasticities in marketing, while sales teams are utilizing a promotion optimization tool that utilizes different factors, additionally RGM and Demand Planning teams may also have their own analysts, systems, co-efficients, baselines, and lifts. There are a variety of vendor capabilities and services noted in the TPx vendor panorama that can support a Holistic Enterprise transformation that includes people, process, and systems.

**Data Management:** As companies have greater amounts of data, it is critical that an organization prioritize data management and assign an owner/team for this critical management component. POI's recommendation is to establish an enterprise data and analytics owner that is responsible for: data management, enterprise analytics and reporting, executive dashboards, and generating the critical "Enterprise" outputs for the common denominators noted above. This Holistic Enterprise approach will drive transparency, consistent process, and accuracy across the organization, while enabling the functional business unit work below. With the Holistic Enterprise approach, cross-organizational work will be done utilizing consistent foundational data.

Can you imagine the positive impact to your company's Integrated Business Planning monthly consensus meeting if all teams involved were using "one version of the truth" and the same underlying "common denominator data" as they built their forecast? Not to mention the downstream benefits and cost savings of having an accurate forecast.

Data is foundational. Yet, companies are struggling to access, cleanse, harmonize, and hub the data. Purchase power of the Millennials is surpassing that of the Boomers and they are digitally engaged. To offer our consumer personalized offers in the new paradigm, data is critical. Clean data enables revenue growth management practices, customer level P&L's, post event analytics, TPO, AI, Holistic Enterprise reporting, and executive dashboards.

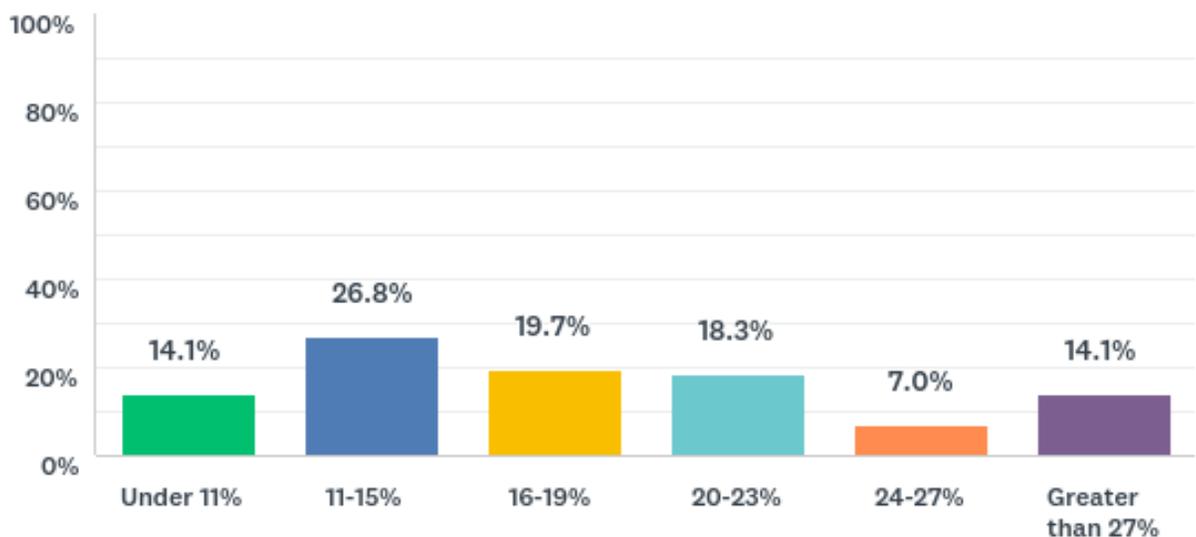
We continue to see a strong correlation between companies that are satisfied with their promotions and their ability to bring external data into the process. While trends are improving, nearly 76% of the companies continue to have data challenges with foundational data, and the need is to advance the types and breadth of data shared to includes services. Retailers and manufacturers must make data acquisition and sharing a top priority in 2020 and beyond.

While many TPx offerings include data management, many do not. This is a key differentiator in vendor support and, ultimately, in the quality of promotional outcomes.

**Baselines:** Baselines are developed and utilized by many functions across the organization as noted above and are foundational to advanced analytics and optimized planning. As a Holistic Enterprise common denominator, it is important that they are accurate. Organizational projections and forecasting efficiency can be gained by unifying the baseline effort. You will see that automated baselines are possible today with many of the TPx vendor capabilities.

**Revenue Growth Management (RGM):** TPx is becoming a subset of emerging revenue growth management (RGM) initiatives. This team has to balance the total enterprise and the short-term and long-term needs of the company. As a result, RGM teams are highly cross-functional in their approach and drive collaboration, cross-BU alignments, and governance for the organization. CPG RGM team’s own enterprise short-term and long-term pricing roadmaps, architecture, and compliance via KPI’s. RGM teams also own retailer trade allocation and balancing the trade funding needs across channels and accounts. Proper allocation, planning, and monitoring of trade spend is critical. CPG companies spend between 11% and 27+% of revenues on Trade Promotions, which continues as one of the company’s largest expenses on the P&L.

**What percentage of your annual revenues do you spend on trade promotions?**



The RGM planning diligence and profit focus has transformed episodic, once a year planning into an ongoing and dynamic planning practice deeply rooted in advanced analytics.

In the 2019 POI survey, 45+% of companies will be advancing their RGM practices. 28% of these companies will be adding personnel and nearly 35% will be advancing technical resources with tools and advanced capabilities.

Vendor capabilities are improving dramatically and companies are embracing revenue growth management practices. With the advancement of capabilities and practices, organizations will be able to transition from siloed independent marketing, finance, sales planning, and demand plans to a more holistic planning effort. Pricing, go-to-market strategies, planning, and forecasting will all be utilizing the same data and analytics.

### **Additional TPx Insights & Opportunities:**

- There is modest differentiation among TPM solutions at the transactional level for planning and executing promotions. What differentiation there is typically can be found in the user experience and also the ability to evaluate promotions before and after they are executed. Greater differentiation can be found in the management and cleansing of data, baseline development, and the ability to predict promotional outcomes and generate insights (using predictive/ML/AI) to improve the overall promotional cycle.
- Artificial Intelligence (AI) is all around us. AI is here today, and it's not bleeding edge. AI can analyze large amounts of data quickly. AI analysis detects patterns, opportunities, and issues, evaluates options, and generates recommendations. How are you building AI into your strategy? This is a strategic question that every retailer, manufacturer, technology vendor, and consultant partner should be asking. Artificial Intelligence has considerable interest among vendors, and you will read in the report of numerous instances where we at POI see it is being brought to bear in a way that benefits promotions, trade, pricing, deductions, and much more.
- 70% of POI survey respondents agree that their companies are struggling to have retailer aligned promotions executed at the store level (vs. 91% YAGO). Through POI research and evaluation, we see advanced analytics and optimization tools available in this space today show promotional outcomes and their financial impacts on both parties, which can help to reduce noncompliance by increasing retailer "buy-in." Many systems can also monitor in-flight promotions, enabling the manufacturer and retailer's ability to stay abreast of promotion execution and performance, and perhaps adjust tactics (especially with digital offers and eCommerce).
- The lack of connectivity between Trade Promotion Systems and Retail Execution Systems is severely impacting execution and revenue gains. Execution is everything, and the inability to pass promotion tactic changes to the field and monitor in-flight activity is costing manufacturers and retailers millions of dollars. 65% of POI survey respondents communicated that their TPx systems are not automatically integrated with their retail execution solutions.
- Omni-channel shopping is becoming prevalent and increased funding is spent against digital and shopper marketing, personal consumer offers, and eCommerce. The vendor capabilities must advance to manage "modern trade" (traditional + digital/eComm/AO). In the 2019 POI survey, 81% of respondents noted that their company is struggling with how to manage modern trade. The lack of linkage between digital and traditional promotion is substantial. Integration of consumer and loyalty shopper data is helping to see who our target consumer is and cater store layouts, offers, promotions, etc. based on these preferences. Ensure your company is on a journey to 'full integration,' which will benefit you as the manufacturer and what you can share with your retail partners. Many of the vendors in the panorama are starting to create the necessary linkages between digital and traditional promotions.

If your company is looking to build or advance your capabilities, join us at POI Summits to connect and dive deeper into these topics. Examples of these technologies and CPG/Retailer case studies will be presented at: [poinstitute.com/events](http://poinstitute.com/events)

To read the full 2019 POI State of the Industry Report: [bit.ly/PoiStateOfIndustryReport2019](http://bit.ly/PoiStateOfIndustryReport2019)



## Recommendations

POI suggests the following strategies for improving your trade promotions:

- Seek to enable all of your trade promotion related processes with technology. We still see a large number of activities that are done in spreadsheets instead of through a system. You are not alone in this regard. We recommend that you evaluate all of your processes when choosing a TPx solution. Adding spreadsheets to compensate for inadequacies in your system of choice only adds cycle time, complexity, the possibility of “multiple versions of the truth,” and increases the chance for errors, including negatively influencing the customer experience.
- Prioritize functionality above delivery method. The lines between SaaS, managed services, hosted private cloud, and public cloud are blurrier than ever. We believe that having the right functionality to deliver insights and build more effective promotions is much more important than how a technology is delivered. Furthermore, as POI watches trends in the industry, including digital transformation, there is a significant movement towards the cloud.
- Evaluate systems and processes that will make the planning cycle more efficient and less burdensome. Systems that have user adoption drive value. 67% of POI survey respondents feel the planning process is burdensome, 26% acceptable, and 6.8% state less than anticipated. This is a 26% increase in satisfaction, as 93% of respondents in 2018 noted that the process was burdensome. User experience and ability to gain user adoption, should top all other considerations, including low price points and promises of easy integrations.
- Ask for best practices from your vendor. Many vendors have implementation teams and or services that can help to assess current gaps in your processes, enable best practice discussions, and facilitate gap closure efforts. This is a differentiator amongst the vendors and critical to improving your promotional execution. Also, find out the background of those who are expected to deliver them to ensure that they are indeed subject matter experts. Then, document precisely the sort of best practices you are looking for and make this part of the scope of work.
- Don't underestimate the need for change transformation. Whether moving from spreadsheets to a server-based system or implementing optimization capabilities, getting people to embrace change is vital.

## TPx Market Overview

Our CPG marketplace is changing and many ongoing issues like effectively managing trade promotions, pricing, forecasts, etc. still persist. Additionally, there are changes in market dynamics with blurring channels and ecosystems. We experience, with our growing membership, some of the following trends, which merit focus from CG manufacturers:

- We have seen multiple merger/acquisitions and also partnerships develop among the vendors in the last year. While there is an adjustment period and fine-tuning of strategy, in these specific instances the merging businesses are well fit and driving forward with Holistic Enterprise Planning capabilities. In this report we have evaluated a total of 18 vendor solutions.
- We continue to have a few “localized” solutions that focus on specific geographies, such as Europe or North America, yet we are also seeing growth with vendors that can service global deployments.
- Deeper analytics, better user experience, and capabilities for optimizing promotions through ML, AI, and predictive models are key differentiators that are highly sought after. We consistently see this in case studies of success.
- Post event analysis and automatic what-if capabilities are often overlooked or an afterthought when considering the entire trade promotion cycle. However, as these capabilities are incorporated seamlessly in the holistic planning and optimization process, it enables fast and extensive promotion evaluation across categories at the time of planning, which is a competitive advantage.

*Before engaging with technology vendors it is important for an organization to understand how new capabilities will fit into the organization's strategy, resolve current pain points, and create enterprise visibility and connectivity across the cross-functional teams.*

## Evaluation Criteria

The Promotion Optimization Institute recommends using this TPx Vendor Panorama to narrow down your options and thus simplify your TPx selection process. Geography is the first criterion to evaluate. If you operate in a specific set of geographies, narrow your search based on vendors that deliver desired capabilities in those regions. Then determine whether you seek TPM, TPO, or a Holistic platform. This will further narrow your search. Next, consider what combination of software and services you seek. We point to these three criteria (geographic presence, TPx capabilities, and software/services combination) because they are relatively concrete and not subject to much perception. It will also narrow the field of potential vendors considerably to a manageable few. Thereafter, continue to rank and weigh the criteria based on your organization's strategy, pain points, and what is most important to the users. This will help to make the selection process more objective as well as help you deal with the complexity of having to look at multiple options.



**Analysis of Representative Vendors**

**visualfabriq** [visualfabriq.com](http://visualfabriq.com)

**Profile:** An integrated TPM/TPO vendor, focusing on manufacturer clients and a growing global presence.

**Geographic presence:** Current: Europe (60%), [South] Africa (25%),

New – North America 15% (Multiple Tier 1 & 2 clients in 2019) AsiaPac (Australia Q1, 2020), LatAm (Mexico Q4, 2019).

**Total consumer goods users (seats):** Visualfabriq utilizes an enterprise subscription model (unlimited user) vs. per user/seat model.

**Tiers represented:** All.

**Solution offerings:** TPM and TPO.

**Major product sub-segments not covered:** Tobacco, consumer semi-durables, and durables.

**Analytics:** Visualfabriq covers the entire planning process end-to-end from planning to evaluation, integrating predictive models for optimized promotion planning while showing the full financial effects. The planning process is scalable and configurable. The platform utilizes web based HTML5 (React). The platform incorporates all leading OS machine learning libraries out of the box, allowing client data science teams to generate cleansed data sets by the platform and use those to directly develop predictive models with these familiar libraries and roll them out directly into production, effectuating predictions directly for all the users. Visualfabriq is one of a very few offerings utilizing AI. With additional AI leadership onboarded, visualfabriq is upgrading the AI implementation methodology to improve even greater results and robustness of models. The platform’s dashboard is intuitive and looks very good. It is easily configurable with drag and drop capabilities. It provides standardized template reports, which can be enhanced or adapted by the user. The ROI promo scatter chart is a nice way to look at the “Top” and “Flop” promotions in a matrix. It shows causal data such as forward buy in a graphical way. It has the ability to proxy a prediction based on similar promotions or solely based on historical data for companies that change their assortment frequently. It has waterfall charts for both the retailer and manufacturer perspectives. The fully automated post event analytics is very strong because of how it compares actual to expected, highlights forward buy, and provides a copy of the ad for reference. In particular, we like how the ROI is graphically represented, while also providing the standard revenue/ROI data field in chart/grids. Visualfabriq also has some unique KPIs, like “bang for the buck” ratio, to provide deeper insights. It does volume prediction on the fly through standard machine learning. Visualfabriq planning and analytics is a full suite of Revenue Management capabilities with the power of applied AI, which enables holistic planning (TPM/TPO/ROI in the moment of planning).

POI rates visualfabriq Analytics as Above Average.

**Configuration/Customization:** As a SaaS solution, no hard coding customization is allowed. Client needs have been able to be met through development that is shared across the install base and through the extensive configuration possibilities that include custom KPIs, entry fields, workflows, reports, and screens which all can be altered by the client administrators.

**Technology architecture/delivery options:** All cloud-based, multitenant SaaS for functionality but database is individual. Hosting is with Amazon Web Services; data can also be covered by Azure if legally required.

**Service partners:** Deloitte consulting, BPX, and Strategic Solutions (LatAm).

**Technology partners:** Amazon Web Services for cloud services and hosting.

**User experience:** The entire visualfabriq front end has been fully upgraded and transferred to React. The user front end is better performing and reflects enhanced visualization. It continues to have an intuitive and action-oriented tile-based landing page. KPI trees are an interesting way to look at things because they provide a deeper view without drilling down. It is very graphically oriented with both charts and grids being exposed simultaneously based on preferences. The “ghosting” feature is also very useful on the calendar. It allows a user to see the prior year or a competitor’s promotions as a shaded box as a reference point when evaluating or planning a promotion. This can also be used with HQ teams for Go to Market strategy development. Another favorite calendar aspect is the ability to visually see which promotions drive more profit/incremental volume, incremental sales/less incremental profit, and simply more net sales. This visual helps the planner quickly evaluate promotion options that can be repeated based on the promotion objectives. The planning process is very stepwise, and a greyed-out circle on the navigation panel informs a user where they are in the process. Best practice sharing across the client base is facilitated by the integrated Zendesk tool and hosting two user groups a year. Joint Customer Business Planning is facilitated by enabling a sales person’s ability to present “in-mode” hiding manufacturer cost etc. and also through exportable PDF proposals. The system has the capability to plan regular and EDLP pricing strategies, register risks and opportunities, and create revenue plans, which provide bottom up input into budget creation and LE’s that can be tracked. Revenue planning is delivered holistically and simply through the three modules [Demand Forecast (DMF), Trade Promotion (TPM), and Trade Spend (TSM)] on one platform, closing the entire S&OP planning loop.

POI rates visualfabriq UX as Above Average on the strength of the ergonomics and numerous profitability management and innovative AI trade capabilities.

**Vendor trend:** Very positive growth trend and a strong roadmap going forward. Investment in people and product have been steady. The company has consistently been able to win deals with companies across the 3-tier structure. POI believes the work it is doing on machine learning and the REACT front end capabilities will pay dividends as an early mover advantage. The change to an unlimited user enterprise subscription model vs. per user/seat model is good and has been appreciated by their customers. Roadmap of new offices demonstrates growth: North America August 2018 (NY office established), AsiaPac (Australia office, 2020), LatAm (New Mexico office, 2019).

**Strengths:** Visualfabriq is resonating with client needs to unlock their data sources, generate relevant insights, and empower their teams to make better/faster decisions—at a lower cost of ownership. A very robust trade management tool that enables price management, promo what-if optimization, promotion planning, internal/external sell out predictions, improved baseline creation, and volume forecasting. Visualfabriq is a forerunner in AI usage for trade

management. 80% of a tier one client's planning is accomplished through new AI capabilities and models. There is flexibility to utilize the AI models or have users input baselines, lifts, etc. The value is in the flexibility as an organization learns to trust the system. This is especially true with clients that don't have robust historical data. One customer was able to reduce their demand cycle from four weeks to one. It has transformed the cross-functional process to lite-touch and is now a 90% automated process. There is a high level of change management that accompanies system implementations and visualfabriq works with clients to move an organization through the change. Visualfabriq utilizes a standard deployment "templated" process that drives successful system implementation between 4 and 7 months depending on the data availability, quality, and change management. It has the ability to handle significant amounts of data. Everybody makes this claim, however, we watched the system load 15,000 promotions in just 30 seconds. Visualfabriq offers two major and two minor releases per year. Similar offerings for retailers/gas stations and E-tailers keep it relevant to areas for collaboration.

**Challenges:** Visualfabriq has a tremendous passion for optimization and advanced topics but must also remain focused on those CG companies that use spreadsheets and just need to move to TPM. It also has the challenge of being a relative newcomer to the space, which can often favor larger, more established players.

**Adjacent offerings:** POS data management and cleansing, remote retail monitoring, and demand forecasting and pricing with AI.

**Key differentiators:** Visualfabriq was created to fill a need in the European market which was lacking in suitable, reliable systems that could address the market complexities, data quantity, and diversity in a user friendly, performant system. The expertise and passion for TPM/TPO/ROI and machine learning to deliver their clients the tools they missed while working in the industry will aid in visualfabriq's growth and client retention. Also, the willingness to offer data management services is quite unique for a vendor of their size, if not for the market as a whole. Baseline creation and forecasting. Visualfabriq is one of the few organizations that allows access to the predictive models and enables a client to get under the hood and understand, align, and facilitate the modeling in a repeatable way (Note: model review is by key client members and not all users).

**Outlook & prognosis:** Given solid growth, excellent vision, clients of all sizes, and a strong/insightful user experience, we expect visualfabriq to continue to be a very strong option for European companies. Global expansion is consistent with numerous deployments in the U.S. and Mexico. We feel confident their passion and drive will overcome any obstacles. The key will be to hire and partner with the right people when entering new markets to help speed to market success.

**Evaluate visualfabriq when:** When your organization is looking for a total trade and revenue management package (TPM/TPO/ROI) from a company that has deep expertise. Also, consider visualfabriq if your organization would benefit from reducing the burden of sales planning/analytics and is open to automated promotion/plan "intelligent" recommendations through AI.

**Avoid visualfabriq if:** If you wish to customize and create a one-off solution, or want a basic/transactional TPM.

**Distinction:** POI Best-in-Class for Financial Orientation and Simulation, Analytics Visualization, TPO Ergonomics, Data Management, and AI.

**POI Best-in-Class Recipients**

Functional area	Recipient(s)	Why critical to TPx?
Desktop UX	Acumen, Kantar, SAP, UpClear & WIPRO	Drives engagement from users, increases total business visibility and reduces administrative burden; drives next best action.
HQ Analytics & Insights	Accenture, Data Ventures, Kantar, Periscope By McKinsey	HQ pricing, promotion; go-to-market enablement of optimal promotions.
Field Analytics & Insights	Exceedra Professional, SAP	Enabling field personnel to build and execute a better promotions by having the key insights available how and when they need them.
Financial Orientation & Simulation	Cornerstone, Exceedra, Periscope By McKinsey, SAP, <a href="#">visualfabriq</a>	Financial accountability, customer P&L management with an RGM focus.
Post Event Analytics	Blacksmith T-Pro Solutions, Cornerstone, WIPRO	Automated post event “what-if” analytics to drive enhanced promotional effectiveness.
Collaboration - Internal	Accenture, Acumen, Data Ventures	Holistic company engagement to leverage enterprise insights, gained by the use of core capabilities, results in increased buy-in from cross-functional partners.
Collaboration - External	Periscope By McKinsey, SAP	Collaboration between vendor and manufacturer &/or retailer for continuous improvement.
Analytics Visualization	Accenture, Exceedra, Kantar, Upclear, <a href="#">visualfabriq</a>	A good graphic, layout or image says it all.
Dashboard	Accenture, TABS	Dashboard with standard yet flexible business measures. Is the launch point for further drill down.
TPO Ergonomics	Blacksmith T-Pro Solutions, Cornerstone, Exceedra, Kantar, <a href="#">visualfabriq</a>	TPO can be complex with constraints, objectives and simulation. It has to be made easy and actionable.
Calendar	Accenture, SAP	An intuitive calendar is a focal point of the plan. It has to be visual, informative, and easy to change or drill down into the promotions.
Remote Promotion Monitoring	Data Ventures, WIPRO	Need to be able to remotely monitor the promotion in-flight, as a dashboard element in TPx, in order to better take immediate action.
S&OP Capabilities	Exceedra, Periscope By McKinsey	Sales volume planning inputs that flow into the demand planning/forecast/Integrated Business Planning (IBR) process.
Data Management	Blacksmith T-Pro Solutions, Data Ventures, TABS, <a href="#">visualfabriq</a>	Sales volume planning inputs that flow into the demand planning/forecast/Integrated Business Planning (IBR) process. *This does not include data management through services.
Artificial Intelligence (AI)	Data Ventures, Kantar, <a href="#">visualfabriq</a>	Capabilities that can learn and predict full year promotion calendars based on a set of objectives and constraints. Provides answers to questions or options the user hasn't thought to ask. CPG applications in: pricing, GTMS, promotions, deductions, etc.

**NEW**

## Conclusion

Managing trade promotions is mission critical in reducing unproductive trade spending, forecasting volume projections, and as a means to improving revenue and profits for both manufacturers and retailers. TPM is a very mature space that offers relatively low risk for CPG companies that are looking to adopt it. Deployment times and costs have dramatically reduced in the last three years. While TPM has transactional benefits, TPO enables the ability to drive substantial cost savings and efficiency. Advanced Analytics and optimization options run from solution-only platforms, Holistic Enterprise Planning platforms, potential for AI, numerous services options, and multiple architectures from on-premise to cloud. POI's overarching recommendation, however, continues to be that CPG companies first determine the "problem they are trying to solve" and then seek out the solution(s) that will move their field sales personnel beyond transactional and enable them to "sell more, and drive profitably" thus creating a competitive advantage.

## About the Author

**Pam Brown** is POI's Chief Commercial Officer. In this role, she creates and executes POI strategy, advisory, and research. She elevates practices and CPG and Retailer relationships. Pam began her career executing at retail, and through promotions advanced to leading retail execution teams for Unilever. For Kayser-Roth she led all Sales and Broker teams west of the Mississippi. In her 14 years with Del Monte she carried many roles. She was the Director of Sales Strategy and Operations which included: Sales Systems and Reporting, Sales Operations, BI Analytics, Sales Training, and Sales Policy. Pam's final role at Del Monte was the Director of IT Governance and PMO, which included planning and leading enterprise wide technology engagements. Pam has current, extensive knowledge in TPM, TPO, ROI, Revenue Management, Advanced Analytics, Change Management, Sales and Sales Effectiveness, Demand Planning, Supply Chain, and other relevant best practices areas. Over the years she has researched, designed, and deployed Enterprise wide solutions to meet business needs. She understands how to execute and gain user adoption of new systems for physical retail and eCommerce. She has advised solutions providers on enhancements to core capabilities and partnered with other CPG manufacturers to share, learn, and drive best practices in today's challenging retail and consumer goods environment for mutual benefit.



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### **About the Promotion Optimization Institute**

POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving the promotion and distribution of consumer goods. Members of POI share cross-functional best practices in both structured and informal settings.

Additionally, members benefit through our industry alliances, the Certified Collaborative Marketer (CCM)<sup>™</sup> program, and industry-leading summits around the globe.

POI aims to instill a financial and metrics-based discipline not typically found with other trade groups. The goal of our innovative approach is collaborative promotion optimization. The focus is on the customer/shopper through sales, marketing, and merchandising strategies.

Executive advisory boards keep us apprised of industry needs and help us provide desired outcomes for members, sponsors, and academia.

#### **For more information:**

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