

THE PROMOTION OPTIMIZATION INSTITUTE'S 2025

CONSUMER GOODS VENDOR PANORAMA

THE GUIDE TO ENTERPRISE PLANNING & RETAIL EXECUTION



Salesforce Consumer Goods Cloud

 salesforceconsumergoodscloud.com



Vendor Profile: Salesforce empowers organizations of all sizes to reimagine their business with the power of AI. Agentforce, a digital labor solution for enterprises, integrates with Customer 360 applications, Data Cloud, and Einstein AI to create a unified workforce that combines humans and intelligent agents, driving customer success on a single platform.

Headquartered in San Francisco, Salesforce is a global leader in cloud-based software, and its Consumer Goods Cloud offers an industry-specific solution with integrated front-office capabilities. With a vision to become the single front-office solution for B2B2C companies, Salesforce has built a comprehensive platform that includes Trade Promotion Management, Customer Planning and Forecasting, Retail Execution, Sales Account Management, and Customer Service, which is powered by humans and agents working together, enabling end-to-end management of B2B and B2C operations from planning through execution.

Enterprise Planning Solution Offerings: Data Management, TPMx, Advanced Analytics, including What-if Promotion Scenarios/ROI/RGM.

Retail Execution Solution Offerings: Retail Sales, Retail Merchandising, DSD, Van Sales.



SOX Certifications: Yes.

Major Industry/Product Sub-Segments Not Covered: None.

Data Management: Salesforce can supply data services to assess, unify, and harmonize the data. This service is not included in the project cost but is a separate service. Salesforce Data Cloud enables companies to

integrate structured and unstructured data into Salesforce using a library of connectors and leverage zero-copy integration from third-party data lakes, including Snowflake, Redshift, BigQuery, and Databricks. Companies can connect disparate data across various applications, including Marketing Cloud, Commerce Cloud, Loyalty Management, ERP, and social media, into a holistic and unified view of the customer.

Digital Content Management: Salesforce provides a comprehensive and scalable product catalog featuring images and detailed product information.

Analytics Modeling: Modeling capabilities within Salesforce CRM Analytics & Einstein Discovery include GLM, GBM, XGBoost, and Random Forest Models. Programmatic algorithms using data flows and simple data sources can also be utilized as a service. There are several out-of-the-box models based on POS, Syndicated, and Sell-in data available in CRM Analytics and Einstein Discovery, and once the data is harmonized, the models are run over the dataset, and the best-fitting model is automatically applied. Once the best-fitting model is assigned, the model updates can be scheduled. Manual intervention is only necessary when the model alerts users that it requires adjustment due to a loss of accuracy. Coefficients and lift factors are calculated and utilized in conjunction with decision trees and regression models to predict promotion outcomes. Cannibalization and halo coefficients are calculated, and these, along with other promotional causals, are all considered part of the historical modeling used to predict promotional outcomes. Some KPIs measure the accuracy of forecasting and overrides, allowing models to be further trained and users to gain trust in the forecast models. Additionally, built on the Tableau platform, Tableau Pulse delivers personalized, contextual insights directly within the workflow to users across the enterprise. Tableau Pulse helps users investigate and understand the why behind the data.

Generative AI/Chatbot Assistant/Agentic AI: Agentforce for Consumer Goods is an AI-powered platform designed to help manufacturers automate key business processes, enhance customer experiences, and drive profitable growth. Using AI actions, prompts, and models grounded in TPMx data, manufacturers can further automate with capabilities such as insights summaries, account summarization, mass promotion creation, and relevant messaging. These capabilities enable the planning of smarter, more profitable promotions and support compliance across the planning and execution process. Salesforce agents utilize large language models to analyze context and make decisions. Users can interact with the agents through typing or sharing photos. The large language models produce relevant information quickly, making it easier than ever for users to take action and obtain answers. Salesforce agents drive measurable productivity and commercial impact, empowering teams to act faster and plan smarter.

Salesforce enables businesses to build and deploy agents that can execute tasks across their entire business, including sales, service, marketing, and commerce. This allows clients to define and build their reports depending on the questions they want answered, utilizing the powerful capabilities of Tableau Pulse. Salesforce is deeply committed to ensuring robust security, compliance, and the ethical development and use of AI. Agentforce is built on its core value of trust and is operationalized through comprehensive frameworks, technologies, and processes. The Einstein Trust Layer is central to their strategy for delivering safe, secure, and responsible AI.

Baseline Creation: Salesforce Consumer Goods Cloud generally receives the baseline from external demand planning systems. However, Salesforce CRM Analytics and Einstein Discovery can now model and predict baselines, generating forecasts that consider advanced effects such as seasonality, pantry loading, forward buying, and others. Baselines can be based on different data sources, including EPOS, syndicated, and sell-in data. The available out-of-the-box models ensure an accurate split of the volume (from scan, syndicated, and sell-in sources) into baseline and incremental causal factors (lift drivers). Furthermore, outlier detection is available to identify 'phantom' spikes. BYOM (Bring-Your-Own-Model) is also supported. Consumer Goods Cloud TPM enables users to adjust the baseline for various business reasons, such as distribution changes or market fluctuations, using their Building Blocks or Customer Business Plan (CBP) functionality. This allows users to change the baseline forecast and communicate these adjustments back to a demand planning system. If customers do not have a baseline, the Building Blocks or CBP functionality can manually create a baseline based on a previous year's values.

Enterprise Planning Capabilities: (TPMx, What-if Promotion Scenarios, ROI, and RGM)

Geographic Presence: Global, specific geographical percentages not reported by the vendor.

Total Consumer Goods Users (seats): Specific user seats not reported by the vendor.

Tiers Represented: All, specific tier percentages not reported by the vendor.

Headquarter Capabilities: Volume and revenue targets can be (and are typically) interfaced and visible in the Account Plan. Channel & Brand teams can utilize the broad reporting capabilities within Salesforce Consumer Goods Cloud, powered by CRM Analytics, to identify annual market share, positioning, spending, and P&L alignment goals. High-level strategies are then established within the solution and distributed or derived to lower levels through push and pull processes, serving as the execution guidelines and supporting the account-level planning process. Brand teams can also develop high-level brand plans and an annual calendar of consumer promotions that include marketing and media initiatives. The strategy can also be further developed by calculating base, incremental volume, and promotional costs in what-if promotion scenarios. Users can manage target setting, mid-level planning, and account KPIs through the Building Blocks or the Customer Business Plan (CBP) capability. Users can also allocate sales and trade targets to any level of the product hierarchy and distribute these down to both the Customer and Product hierarchies based on a single-level allocation. Additionally, capabilities like Account Manager Targets, Sales Agreements, and Advanced Account-Based Forecasting enable comprehensive business management on a single platform.

Marketing: As Consumer Goods Cloud TPM runs on the Salesforce platform, both marketing and trade spend are defined within the different Clouds and can be displayed within the Account Plan P&L. Salesforce offers a solution focusing on Consumer Marketing Intelligence that monitors engagement and activations across email, social, advertising, web, and sales platforms, allowing users to view consumer marketing activities alongside promotions on the trade calendar. By leveraging unified data, Salesforce Marketing Cloud Intelligence optimizes successful cross-channel consumer campaigns. This is managed via dashboards that measure performance KPIs against campaign goals, providing automated predictions on goal completion and action recommendations to maximize ROI on retailer and consumer marketing investments. The New Item Feedback feature is a dashboard tied to content management, providing users with a view of item performance at the store level and further enriching the feedback loop on new items. Additionally, the full suite of products offered by the Salesforce Platform, including Einstein Analytics, CRM, Tableau, and Agentforce, enables system implementation partners to configure marketing and media mix analytics tailored to the client's specific needs.

Trade Promotion Management (TPMx): The Salesforce Consumer Goods Cloud platform is a closed-loop TPMx that enables strategic planning, funds management, account planning, promotion planning, promotion execution, reporting, and dashboards. Users, based on their role, access the solution through a configurable dashboard that follows a workflow and directs them to the next best action. The promotion library offers an intuitive visualization of all past promotions, along with historical performance metrics. Adding a promotion from the library to the plan is as simple as a click. The promotion automatically populates, providing flexibility to update fields as necessary. The impacts of the changes made are immediately visible in the dashboard tile, expediting the ability to make informed decisions. The bill of material planning for displays feature enables users to plan displays at this level, taking into account volume and spending. This is a robust capability that pulls visibility of BOM planning into the solution, providing an even more accurate picture of the business for the organization. Additionally, Salesforce enables users to collaborate with retail partners through the use of Slack and Chatter features.

Consumer Goods Cloud TPM supports planning at any single account hierarchy level, down the product hierarchy, and across the time dimension. The tool also supports distributing promotional values (e.g., volume targets and/or fixed spends) down the customer hierarchy using the multi-level push promotion functionality. Sales Volume Planning at higher levels of the account hierarchy, as well as collaboration between these hierarchy

levels (e.g., target distribution), is part of the roadmap. Additionally, CRM Analytics provides further visibility into the customer/product hierarchy for reporting purposes, including the ability to create a Sales Bulletin.

Salesforce has a robust planning capability for wholesalers, indirects, and multi-tier planning. We like the ability to view the wholesaler and subgroup promotions on one screen visually. Users can also plan top-down promotional strategies from higher levels of the customer hierarchy down to the planning account level. This is of high value to those planning large banner retailers or wholesalers. Users can also see potential overlapping promotions by viewing the promotion plan of the entire 'group' of wholesalers and indirects. Related to funding, users will benefit from an enhanced Tactic/Fund card, which identifies funding sources and populates KPIs 'on-the-fly' without the need to save the promotion. Additionally, users benefit from the increased configuration of this card, allowing for several 'metrics' (e.g., Available to Plan, Current Budget, etc.) to be made visible, thus eliminating the need to open the Fund Record itself to see this information.

Salesforce enables users to configure auto-match and auto-clear/close deductions according to organization-specific rules. Salesforce utilizes a hyperlink audit trail, enabling users to access all necessary data to easily clear claims.

TPMx User Experience (UX): The Salesforce Consumer Goods Cloud solution is visually intuitive and aesthetically pleasing. We appreciate the collaborative measures built into the platform, which encourage work across the enterprise within a single solution. The solution provides a user persona-based dashboard that gives a comprehensive overview of the customer. The quick links at the top of the planning screen provide KAMs with the ability to drill into the business and access details, thereby enabling them to see the state of the business more quickly. It comes pre-built with a P&L sheet with live calculations and live embedded KPI charts that can be exported. The Salesforce KAM cockpit consolidates all necessary information on one page to manage customer relationships and drive category growth. CRM, in the context of TPMx, enables the KAM to view upcoming tasks, intelligent alerts, and risks and opportunities related to the customer in one place. The Account Team Channel facilitates collaboration through conversations and proactive notifications. Users can utilize opportunity requests as they are embedded in the planning tab, creating efficiency for users by saving time. Strategic KPIs for account plans are available directly within the promotion UI. We particularly like how the Key Account Manager agent feature provides users with another simple and interactive way to create promotions. Consumer Goods Cloud has an excellent trade calendar, which segues insights through drill-down filtering. Users can quickly reset the filter for an 18-month rolling plan view and see which promotions are committed. The cross-brand view enables multiple accounts and brands in the calendar view to see if your 'own brands' are competing with each other.

Reporting includes a suite of preconfigured reports providing access to relevant metrics on the fly. Salesforce also has an excellent set of standard, out-of-the-box TPMx dashboards. The actionable data is represented visually using an odometer, funnel, list, scale, and doughnut/pie charts. The layout features several visual tiles that communicate all aspects of the evaluation of a promotion with a drill into capability, as well as added spend and assortment dashboards. The platform can also visualize a decomposition of total volume into base and uplift using CRM Analytics, leveraging models created in Einstein Discovery. They have enabled greater integration flexibility for bringing tactic-specific actuals into P&Ls, correlating the data to exact promoted weeks, and improving accuracy and embedding analytics within the flow of a user's daily work. Additionally, Salesforce TPMx now supports flexible business years and custom periods in KPI exports.

Advanced Analytics Capabilities: Salesforce has strong analytics capabilities. Clients can utilize the full capabilities of Salesforce (e.g., Lightning Report Builder, CRM Analytics, Tableau) or third-party vendors for reporting or analytics use cases that fall outside of those described in the TPMx. Reporting visibility is managed to ensure optimal system responsiveness through thresholds for KPIs and the number of products in use. For advanced analytics, Salesforce delivers a Trade Promotion Effectiveness solution, based on CRM Analytics, with an embedded experience that focuses on promotion, spending, tactic, volume, and assortment analysis. Salesforce boasts nice ROI analytics for post-promotion evaluation, leveraging the modeling techniques within Einstein Discovery. This enables users to identify the spending types that deliver the highest margins and

promotional events that may not resonate with consumers. Real-time reporting supports post-event analysis processes by, for example, comparing plan vs. actual ROI or plan vs. actual revenue for past events, both at the promotion and account levels. Notably, however, there is currently no auto-adjustment for misrepresented promotions in syndicated data, which must be done manually. Lightning Reports can be configured to support various post-event analysis processes, such as comparing plan vs. actual KPIs for all or a subset of promotions. Lightning Dashboards can utilize this data to support multiple post-event analysis processes, such as promotion performance, top 10 and bottom 10 promotions, plan vs. actual, and more.

What-if promotion scenario planning enables users to compare various combinations of tactics to determine the ideal promotion and view a side-by-side profit and loss (P&L) comparison. Tactics are configurable and can handle complex multi-buys. Users can enter promotion volumes manually in Salesforce if desired, but the real power lies in using Einstein Discovery models. Einstein Discovery evaluates what-if promotion scenarios based on actionable criteria, predicting baselines with intelligent analytics powered by historical actual performance.

Users can define the baseline and break down the actual volume to see which parameters should be changed to improve the promotion. The analysis outcome is reflected in a well-organized chart that displays modeled volume, decomposition splits, and historical data in one view. Salesforce has enhanced the promotion library to be highly visual, allowing users to see the most effective promotions at a glance. Additionally, the account scenario functionality has been enhanced with the ability to configure on the promotion card, and it supports different input numbers per scenario. TPMx What-if Scenario comparison is at the account plan level, enabling users to compare up to five promotion scenarios simultaneously. This enables content for collaboration with customers and contingency planning. Shortship and distribution analytics also emerge from scenario planning. Users can see and mitigate potential supply chain impacts from promotions, which is another point for collaboration within the organization. Currently, there is no out-of-the-box constraint-based optimization available. However, Salesforce's open API strategy allows it to incorporate optimized plans and calendars from partner solutions. Namely, Salesforce has established a partnership with Enterra, offering advanced modeling and optimization that directly connects with Salesforce via API.

Revenue Growth Management is currently executed in Salesforce via client-created and customized analytics dashboards. POI has seen robust analysis examples in pricing, assortment, and spending. CRM Analytics enables users to create price ladder analysis reports, assess price pack curves, and monitor trends and progress in various dashboards and reports. Custom dashboards can be designed to provide visibility into the current price pack environments per customer and product. Users can then create new pack sizes/formats and evaluate the product price changes and the impact on demand, volume, and profitability. CRM Analytics and Einstein allow users to view different products by customer and brand, and analyze the existing white spaces. Products can be added/listed or removed/delisted from existing assortments directly from the analytical dashboard, enabling central users to add products to multiple customers in one channel quickly. Partnerships with Enterra and other RGM solution providers allow the deployment of Advanced ML/AI capabilities for promotion optimization, price elasticity management, and base/uplift predictions.

Advanced Analytics User Experience (UX): Salesforce Consumer Goods Cloud consistently delivers an excellent UX. Intuitive and straightforward, yet robust, the dashboards offer a comprehensive and customized view of the business. The flow is user-friendly and drives users to action. Client users recommend using CRM analytics vs. standard analytics to enable a more robust reporting experience with increased visibility and drill-down capabilities. We like the comprehensive Spend Analysis Dashboard, as it tells the whole story of investment and volume on one page. The smart UX provides one-click access to Promotion Product Assortment, Volume Planning, Spend Planning, and Funding from anywhere in the promotion, with volume predictions embedded nicely in the flow. Chatter and Slack are also featured in the settlement process, creating space for collaboration.

Global Deployment Enablement: Consumer Goods Cloud TPM supports multi-market, multi-category configurations from within a single instance or with separate instances. They leverage business templates and Sales Organizations to accomplish this work. The Sales Organization concept defines the enterprise

segmentation of processes and data (e.g., country- or division-specific) within a single Salesforce Org. At the same time, business templates enable the granular configuration of business processes (i.e., different routes to market or trade term/P&L requirements) within each Sales Organization. This entire approach supports global deployments by leveraging repeatable templates, thereby expediting the implementation pace. Different Sales Organizations manage product and sales hierarchies, allowing for flexibility at the local level.

Integrated Business Planning (IBP): Salesforce Consumer Goods Cloud can adjust the baseline due to various business reasons, such as distribution changes or market fluctuations, using Customer Business Planning (CBP) or Building Blocks on a quarterly, monthly, or weekly basis. This method enables sales users to adjust the baseline forecast and communicate these changes to the demand planning team. Additionally, teams can collaborate throughout this process by leveraging embedded Chatter and Slack capabilities. Slack enables internal interaction and provides predictive recommendations. The Salesforce platform also allows users to gain visibility into planned marketing campaigns and activations across B2B2C. Users often utilize this information when participating in the joint business planning process with retailers. In addition to internal collaboration, Salesforce also has external collaboration capabilities. Companies can create external channels on Slack with Huddle and Canvas functionality. Experience Cloud enables companies to share and access key data, insights, and objects, while omnichannel service capabilities ensure that companies can service customers 24/7. The Joint Business Tracker was specifically designed to facilitate this process.

Foodservice: The solution is currently retail-focused. However, it is installed on the Salesforce platform, which enables clients, in addition to the Consumer Goods Cloud capabilities, to utilize the Salesforce ecosystem for foodservice capabilities such as Opportunity Management, Asset Management, Event Management, Service Requests, and Field Service with a connected user experience.

Configuration/Customization: Salesforce Consumer Goods Cloud provides configuration and customization options without compromising the ability to upgrade. Modules can be enabled or disabled using configuration tools and adapted at the business process level. The UX enables the creation of various components using standard Salesforce technologies.

Technology Architecture/Delivery Options: Multi-tenant SaaS.

Service Partners: Global SIs such as Accenture, PwC, Deloitte, and Corrao Group, along with seven other partners, have implemented Salesforce TPMx. An additional 20+ partners have been enabled globally and are ready to implement Salesforce TPMx capabilities for customers of all sizes. A strategic partnership with AWS Marketplace provides customers with an optimized buying experience for the Consumer Goods Cloud TPM solution.

Technology Partners: Salesforce has strategic technology partnerships with Apple, AWS, Google, Microsoft, IBM, and Alibaba. Additionally, clients can now store and process certain data on the Google Cloud Platform.

Strengths and Key Differentiators: Salesforce's combination of CRM, TPMx, (zero-copy) Data Cloud, and Agentforce offers a unique approach to supporting annual customer meetings and joint planning. It emphasizes the retailer's business and suggests data-driven next-best actions. Complemented by MuleSoft, which provides pre-built integration accelerators for common planning and execution data sources, this setup enables users to start quickly and gain cost-effective insights into key data points. The emphasis on collaboration throughout the solution encourages adoption across the enterprise. The Salesforce ecosystem offers a fully connected front-office solution. Additionally, Consumer Goods Cloud is one of the few vendors with Retail Execution capabilities, with common data objects built on Salesforce's platform extensibility. It provides a flexible, configurable framework that automates promotion transformation and mapping at scale between trade planning and in-store execution, including product and account mappings based on promotion-type configurations. Field representatives can access the latest promotions in real-time. With embedded analytics, account managers and field reps can view store participation in promotions, promotional compliance, and the competitor landscape.

Opportunities: Salesforce recognizes the need for manufacturers to have end-to-end enterprise planning capabilities and is developing a comprehensive solution in response to this need. Enabling Sales Volume Planning to work up/down the customer account hierarchy will help Salesforce provide a single, integrated, top-down/bottom-up sales planning process. Salesforce also has liability accrual functionality (Salesforce states this feature is currently in pilot now and will be generally available in Q4 this year), which integrates with the customer's ERP system and calculates the accruals at the 'outlet' level with aggregation possible to the planning level, by SKU and by week for display within the Salesforce TPMx P&Ls.

Vendor Trends and Outlook: Salesforce has heavily invested in its Consumer Goods Cloud TPM solution, and we see a strong roadmap for continuing to enhance and expand capabilities, many of which are based on client user feedback. They are making headway as they close foundational gaps, such as those related to accruals.

With tools like Agent Builder in Agentforce, businesses can customize agents to fit specific roles or industries, integrating seamlessly with Salesforce's ecosystem and external systems. Agentforce can be equipped with any necessary business knowledge to execute tasks according to its specific role. It enables organizations to build and deploy intelligent agents that operate across sales, service, marketing, and supply chain functions. Agentforce's advanced automated agents enable multi-agent collaboration, where each agent plays a specialized role in solving complex problems. These systems operate via structured workflows that enable automated planning, decision-making, and self-improvement through reinforcement learning and fine-tuning. The vision is that agent assistants will evolve into fully autonomous AI agents, capable of executing real-world tasks with minimal human involvement. Additionally, Salesforce is advancing Agentforce into promotion planning and claims. Agentforce allows customers to achieve greater efficiency in their businesses, and when combined with their TPMx solution, enables integrated enterprise planning and execution by driving greater automation and precision throughout the trade planning and execution processes. We see exciting growth opportunities, particularly with synergies across the entire Salesforce portfolio and its increasing number of natively integrated ISV partners.

Adjacent Offerings: CRM, CPF, POS data management, POS data-cleansing services, shelf management/visualization, and digital merchandising. Rebates Management, Manufacturing Cloud, Contract Lifecycle Management, Trailhead (learning and Enablement), Net Zero Cloud (Sustainability), CPQ (Configure, Price Quote), Channel Relationship Management, Agentforce, Data Cloud, Mulesoft, and Slack. Salesforce Consumer Goods Cloud Solutions delivers integrated TPx and Retail Execution systems with common data objects, resulting in seamless integration between these platforms.

Evaluate Salesforce Enterprise Planning When: You seek global enterprise planning capabilities with an excellent, modern user experience. Also, evaluate Salesforce platforms when your organization sees the value of having an integrated TPMx/CRM or TPMx/Retail Execution solution.

Retail Execution Capabilities: **(Retail Sales, Retail Merchandising, DSD, Van Sales)**

Geographic Presence: Global, specific geographical percentages not reported by the vendor.

Total Consumer Goods Users (seats): Specific user seats not reported by the vendor.

Tiers Represented: All, specific tier percentages not reported by the vendor.

Industries: All.

Configuration/Customization: Salesforce offers an open cloud computing platform that enables companies to customize and integrate with third-party providers without worrying about upgrades. Consumer Goods Cloud comes with Modeler, enabling customers to configure and customize a hybrid (offline-first) mobile app. Salesforce also offers platform tools, including an application development environment for coding custom

extensions, a declarative framework for business user-level enhancements (using clicks, not code), the Lightning App Builder for building responsive UX for any device, and a powerful business process builder. Customers can further enhance existing processes with the many partner offerings in the Salesforce AppExchange. The Consumer Goods Cloud Retail Execution solution benefits from three annual releases, is built on a fully extensible technology stack, and offers rapid deployment and prototyping tools.

Technology Architecture/Delivery Options: Multi-Tenant SaaS.

Service Partners: Accenture, PWC, CapGemini, Deloitte, Cognizant, and many regional Salesforce implementation partners.

Technology Partners: Apple, AWS, Google, Microsoft, IBM, Meta (Facebook), and Alibaba.

User Experience (UX):

Field User Perspective: Field users are remote by nature, and as such, the Consumer Goods Cloud Retail Execution solution assures they are never alone with connectivity to HQ supporting functions and their customers. The Salesforce platform provides all users with a consistent and familiar look and feel. This brings category planning, marketing teams, and the entire enterprise closer to the shelf. Account Managers, Sales Managers, and other back-office/HQ personnel have visibility into accounts, territory performance, and key metrics related to sales representative and store performance. Dashboards offer live analytics capabilities and are available offline in the mobile app, providing immediate insight into store activities, as well as product and category performance. Furthermore, the enhanced Closed-Loop Promotion Planning and Execution creates a seamless promotion flow between trade promotion planning and retail execution, increasing efficiency and visibility. It provides a flexible, configurable framework that fully automates promotion transformation and mapping at scale between trade planning and in-store execution. It includes product & account mappings based on promotion-type configurations. Field reps have access to the latest promotions in real-time. With embedded analytics, account managers and field reps can view store participation in promotion, promotional compliance, and the competitor landscape. Live Reporting provides sales representatives with real-time in-store feedback, enabling them to discuss and resolve current issues with the store manager.

Specifically for the field rep, Salesforce has process-driven UI and user role-specific cockpits with intuitive navigation. Users no longer need to navigate the application using classical menu structures. User-specific cockpits combine operational work with insights and live reporting. The retail execution app has evolved into a hybrid app that supports both offline and online scenarios, and can be extended via standard platform capabilities, such as Lightning Web Components.

Salesforce Maps, included with Consumer Goods Cloud, provides intelligent route optimization and live tracking of reps to leadership and the back-office team. Users can respond to unplanned situations by identifying the most relevant customers close by and utilizing the one-click creation of an ad-hoc visit directly from the map. Salesforce offers an Embedded Geographical Information System (GIS) with advanced routing, visit scheduling, territory optimization, and live tracking capabilities. Geofencing can be set to ensure reps are in their zone and automate follow-up communication. Business rules such as visit cadences, time windows, and priority levels can also be utilized.

Field reps get a 360-degree view of their planned day and store details. An overview dashboard highlights the day's tasks, priorities, performance metrics, and a map view of their route. Routes are pre-determined, combining both route and activity optimization. The field user can drill down to store-level views, which include account information, details of previous visits and past orders, current and upcoming promotions, manager instructions, and more detailed performance metrics and KPIs. Step-by-step guidance is provided for the visit, including Intelligent Alerts and AI-generated recommendations. Salesforce has introduced advanced time tracking and geofencing capabilities to further enhance compliance

monitoring. These enhancements enable precise tracking of user location and time during check-in and check-out, restrict check-ins and check-outs outside designated geofenced areas, and prevent users from initiating new visits before completing the previous ones. All features are configurable based on market-specific settings, ensuring flexibility and control.

Salesforce has deployed visit planning enhancements to support simplicity of planning, including the ability to transform an activity to a visit via drag and drop, planning visits automatically for a whole week with one click, creating visits for a day or a week via drag and drop lists from trip lists, and the ability of a user to adjust their schedule by moving existing visits to a different day and time with drag-and-drop capabilities. POI likes it when solutions streamline planning, call elements, and effectiveness. While the features and functionality make the field rep more efficient, Salesforce aims to transform the representative from an order taker into an order maker. Retail and activity optimization guide stores on where to visit and prioritize tasks and activities.

Salesforce continues to enhance DSD with preconfigured processes for delivery execution, return management, cash collection, and inventory check-in.

Out-of-the-box integration with IR vendor partners provides image recognition capabilities that can detect out-of-stock items and planogram compliance, informing the further development of analytical models. The use of Slack and/or Chatter is available for real-time internal collaboration and engagement.

Gamification features provide a visual indication of progress against assigned tasks. The Trailhead learning community can be used to monitor both mandatory and optional training for the entire organization.

Retail/Customer Perspective: The Salesforce Consumer Goods Cloud is designed for omnichannel engagement. Functionality is consistent across devices (mobile app, desktop) to enable Virtual Retail Execution and B2B self-service. Like the Service console, with Salesforce Consumer Goods Cloud for Sales, inside sales reps can segment stores, design personalized outreach programs, and generate revenue by taking online orders using penny-perfect pricing directly from the main sales console.

Outbound and inbound call centers can engage customers however and whenever they want, and all data, including customer orders, remains centralized. Addressing retail execution in this hybrid manner offers flexibility and efficiencies in today's changing retail environment. With Omnichannel Engagement, companies can deliver a frictionless customer experience across various channels from planning to execution. Telesales agents engage store owners and personnel (via phone, text, email, and chat) to execute the functions of a retail call. Sales collateral can be shared and usage tracked. The same suggested order capability a field rep enjoys can create an order for confirmation. Loyalty and rebate management capabilities provide a framework to build your loyalty program to incentivize distributors and retailers accordingly.

Salesforce Consumer Goods Cloud for Service is a new solution that enables service agents to easily sell new products and respond to customer inquiries from a single console, integrated with Retail Execution to ensure penny-perfect pricing. Capabilities include an interactive timeline, action launcher, order-taking, retail execution visibility, and embedded account identification. Salesforce's Retail Execution solution is further strengthened by comprehensive Asset and Warranty Lifecycle Management, enabling organizations to define and enforce warranty rules and entitlements, efficiently capture and adjudicate claims, and maximize asset lifetime value while minimizing operational downtime. Moreover, Consumer Goods Cloud launched a new Proactive Maintenance solution, which helps ensure that assets and equipment are maintained efficiently and issues are addressed before they become critical. This same functionality has already been deployed and proven successful in other industries.

Back-Office (HQ): As mentioned above, Account Managers, Sales Managers, and other back-office/HQ roles have visibility into accounts, territory performance, and critical metrics related to store conditions

and sales representative performance. Salesforce has integrated Slack with the Consumer Goods Cloud to enable internal communications and real-time messaging. Integrated and immediate communication is vital for linking key account managers, sales leaders, and the field sales team to execute and monitor trade promotions. Salesforce refers to this as Intelligent Trade and Execution Planning.

Analytics: Salesforce CRM Analytics is native to the Salesforce platform and is available both online and offline, on mobile and desktop devices. The solution can handle large amounts of data from multiple internal and external sources. Connecting external data sources to Salesforce is straightforward through the Mulesoft API. Salesforce provides standard reports and dashboards that follow market best practices. The flexibility of the Salesforce platform and Einstein Analytics allows the data model to be configured, customized, and extended for additional business scenarios. Furthermore, CRM Analytics Mobile enables field teams to access CRM data and dashboards directly within the mobile app. With the offline app, users can download analytics such as Territory Performance, Visit Dashboards, and Sales Rep Performance for comprehensive performance, execution, and monitoring—all with the same look and feel as the online version.

Since CG companies often receive data from multiple sources in different formats and at various times and durations, Data Cloud, in conjunction with CG Cloud, captures and harmonizes both structured and unstructured data. This enables users to segment audiences more effectively and calculate Customer Lifetime Value and Perfect Store Score. This unified customer profile powers AI models for automation, such as predictive ordering or delivering essential insights through smart account summarization.

Additionally, Retail Execution includes AI-embedded analytics to guide a mobile rep with visit recommendations, intelligent route planning (integrated with Salesforce Maps), and advanced execution analytics. Moreover, new agentic AI agents enhance Retail Execution capabilities by automating simple actions in visit scheduling, enabling products to reach customers faster.

Data Management: Consumer Goods Cloud enables easy configuration and customization of the hybrid mobile app. This simplifies integrating analytics beyond Salesforce CRM into the mobile experience. Customers can also define new objects, attributes, UI elements, live reports, and business and process flows to support customer-specific data needs.

Salesforce is an AI platform that provides a single version of the truth for organizational data. Since TPMx and Retail Execution are on one single platform, there is a bi-directional flow of data, enabling KAMs to have a real-time view into the success KPIs of their promotions. Salesforce Data Cloud enables companies to integrate structured and unstructured data into Salesforce using a library of connectors and zero-copy integration from third-party data lakes, including Snowflake, Redshift, BigQuery, and Databricks. It enables companies to connect disparate data across applications, including Marketing Cloud, Commerce Cloud, Loyalty Management, ERP, and social media, into a holistic, single customer view. Companies can combine consumer data with retailer data to gain AI-powered insights about the next best action or recommendations. Insights can be used to segment audiences and personalize the B2B2C experience.

The Data Kit for Consumer Goods combines Consumer Goods Cloud and Data Cloud to create a single source of truth across B2B and B2C. It combines first-party and third-party data, along with profile and demographic information, to gain in-depth insights into product performance. This allows consumer goods companies to optimize assortments, promotions, and new product launches.

Enterprise Integration: The Salesforce platform's open architecture enables API extensibility, allowing integration with Consumer Goods Cloud, other TPMx and ERP systems, and various data sources. Any changes to the information will be automatically updated in the Consumer Goods Cloud and mobile app. Additionally, the Salesforce partner ecosystem and the AppExchange offer a range of tools that enable easy data connection from any system, eliminating the need for custom code.

Strengths & Key Differentiators: Salesforce's Omnichannel Engagement supports hybrid retail coverage across reps, telesales, merchandisers, and self-service capabilities. With Consumer Goods Cloud for Service, service

agents can engage with customers to sell new products with penny-perfect pricing and address customer inquiries directly from the service console. Loyalty program capabilities further strengthen sell-more capabilities. Having Slack integrated with the platform benefits cross-functional teams and organizational communication. It enables users to collaborate and share ideas with internal and external stakeholders, speeding up innovation. With Salesforce Data Cloud, trapped data across applications, including Retail Execution, can be connected into one centralized source to provide a holistic data view. With Agentforce, Salesforce's automated and assistive AI, predictive AI, and analytics capabilities provide teams with actionable insights and task automation, allowing them to spend more time selling. Service representatives are empowered with intelligent insights, personalized recommendations, and efficient scheduling, which streamlines their workflows and enhances every customer interaction.

Opportunities: As Salesforce continues to acquire additional capabilities and build out end-to-end value chain functionality, its challenge will be integrating these new capabilities into the Salesforce ecosystem.

Vendor Trends & Outlook: Salesforce is a widely used CRM platform across CPG organizations and is transforming into Agentforce, a comprehensive Agentic CRM platform. Salesforce Consumer Goods Cloud was first launched in 2019 to bring together key functionality for CPG manufacturers, delivering efficiency and effectiveness across organizations. Data Cloud can enable businesses to connect disparate data across applications into a single, centralized source, providing employees with a holistic view of their data. Salesforce continues to invest in and strengthen retail execution, as well as the organization's overall portfolio and performance.

With the introduction of Agentforce, customers can build, deploy, and manage agents for various business functions, optimizing business processes that align with the company's brand voice and utilize trusted business data. Additionally, with Agentforce, representatives can gain more insights about their visits. Salesforce's automated and assistive AI, predictive AI, and analytics capabilities provide teams with actionable insights, saving time on addressing tasks and allowing them to focus more on selling. With Agentforce, Salesforce provides a unified view of customer interactions across channels, enabling organizations to deliver an exceptional customer experience and drive customer satisfaction, loyalty, and business growth. With Consumer Goods Cloud for Service, service agents can engage with customers to sell new products with penny-perfect pricing and address customer inquiries directly from the service console. With Agentforce, service representatives are empowered with intelligent insights, personalized recommendations, and optimized scheduling, streamlining their workflows and enhancing every customer interaction. The flexibility of the Salesforce platform is a strength, allowing customers to build, integrate, and extend solutions as needed.

Consumer Goods Cloud launched a new Proactive Maintenance solution, which helps ensure that assets and equipment are maintained efficiently and issues are addressed before they become critical. This same functionality has already been deployed and proven successful in other industries.

Adjacent Offerings: TPMx, Location-based tracking, digital self-service (Experience Cloud/Portal, B2B Commerce), Consumer Service and Field Service (Service Cloud), B2B Marketing (Marketing Cloud), Partner channel management for distributors and brokers (PRM), learning (myTrailhead), enterprise social network (Slack & Chatter), productivity (Quip), sustainability (Sustainability Cloud), Channel Incentives (Loyalty and Rebates Management), real-time data and insights (Data Cloud).

Evaluate Salesforce Retail Execution When: You want to connect your entire enterprise fully by leveraging the Salesforce ecosystem. Your organization aims to leverage Agentic AI, utilizing AI-enabled insights, to inform and guide field activities. Also, if you are seeking a solution to support a hybrid model for retail coverage, including self-service capabilities.

POI's 2025 Best-in-Class Category Distinctions: Connected Enterprise, Field & Analytics Insights, Generative AI/Chatbot Assistant/Agentic AI, Internal Collaboration, TPMx UX, Retx Back-Office Desktop UX, RetX Mobile UI/UX, RetX Omnichannel Engagement-(eCommerce/B2B/DTC/Tele-virtual), RetX Retail Activity Optimization (RAO).

About the Authors



Pam Brown is POI's Chief Commercial Officer. In this role, she creates and executes the POI strategy, advisory, and research. She elevates practices and CPG and Retailer relationships. Pam has over 30+ years in the CPG industry. She began her career in retail execution and, through promotions, advanced to leading retail execution & key account teams for Unilever. For Kayser-Roth, she led all Sales and Broker teams west of the Mississippi. In her 13 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, ROI, Revenue Management, Advanced Analytics & Optimization, Change Management, Sales and Sales Effectiveness, Demand Planning, Supply Chain, Organizational Effectiveness, Sales Training, 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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A special thank you to **Sarah Meyer**, who has been a POI Affiliate and partnered with Pam Brown on POI Manufacturer Advisory for over 7 years. She participates in the Enterprise Planning vendor process, supporting the creation of the document you have enjoyed. As a POI Affiliate, Sarah works with companies to optimize profit through effective planning, specifically in TPM and trade optimization. Sarah has over 20+ years of experience in the CPG and Food industry. She worked for 15 years with Rich Products Corporation, where she began her career in Finance and transitioned over to Sales to lead the trade management practice and TPM. She has led Sales Account Planning and business implementations of TPM process and technology. She has worked closely with Retailers to lead collaborative planning efforts and drive insights to change.

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)[™] and RGM Foundation[™] programs, 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 Holistic Enterprise Planning. 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.

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