

Salesforce Consumer Goods Cloud

 salesforceconsumergoodscloud.com



Vendor Profile: Salesforce empowers companies to connect with their customers through the power of CRM + AI + Data + Trust on one unified platform: Einstein 1. Salesforce is a global cloud-based software company headquartered in San Francisco, California. Salesforce Consumer Goods Cloud is an industry-specific product that enables companies to deliver profitable growth with integrated planning and execution Consumer Goods Cloud Trade Promotion Management (TPM), which maximizes profitability with intelligent trade planning, is a key component of their connected B2B2C solution.

Enterprise Planning Solution Offerings: TPM, Advanced Analytics, including What-if 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 a part of the project cost but a separate service. Salesforce Data Cloud enables companies to integrate structured and unstructured data into Salesforce with a library of connectors and leveraging zero copy integration from third-party data lakes such as Snowflake, Redshift, BigQuery, and Databricks. Companies can connect trapped data across applications such as Marketing Cloud, Commerce Cloud, Loyalty Management, ERP, and social media into a holistic and single view of the customer.

Digital Content Management: Salesforce offers a comprehensive and scalable product catalog with images and 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 data set, 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 needed when the model warns the users that it needs adjusting due to a loss of accuracy. Coefficients and lift factors are calculated and used 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. There are KPIs that measure the accuracy of forecasting and overrides so the models can be further trained and users gain trust in forecast models.

Generative AI/Chatbot Assistant: Einstein Copilot takes dashboards to the next level with action prompts and recommended next steps. Prompt Builder allows companies to build reusable prompts to summarize and generate content, enabling teams to finish tasks faster. This innovation enables the generation of trusted content from the data within TPM and improves the user experience across all functions, from email and messages to sales playbooks. Using trusted AI actions, prompts, and models, grounded on TPM data, companies can increase efficiency with capabilities like insights summary, account summarization, mass promotion creation, and relevant messages. The Einstein Trust Layer helps protect data and promote the safety and accuracy of results with data masking and zero data retention.

Einstein 1 Studio brings tailor-made AI experiences into RetX with Einstein Copilot and low-code AI builders like Copilot Builder and Prompt Builder. This innovation allows for the generation of trusted content from data within RetX and improves the user experience across all functions, from email and messages to sales playbooks. Companies can use trusted AI actions, prompts, and models grounded on RetX data to increase efficiency with capabilities like insights summary, account summarization, and relevant messages.

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 baselines and generate a forecast. 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 allows users to increase/decrease the baseline for various business reasons, such as distribution changes, market changes, etc., 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: (TPM, What-if Scenarios, ROI, and RGM)

Geographic Presence: Salesforce does not disclose this information.

Total Consumer Goods Users (seats): Salesforce does not disclose this information.

Tiers Represented: All.

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 set up within the solution and distributed or derived to lower levels using push and pull processes, acting 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 includes marketing and media initiatives. The strategy can also be further developed by calculating base, incremental volume, and promotional costs in “What-If” 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 on any level of the product hierarchy and distribute these down to both the Customer and Product hierarchies based on a single-level allocation.

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.

Trade Promotion Management (TPM): The Salesforce Consumer Goods Cloud platform is a closed-loop TPM that enables strategic planning, funds management, account planning, promotion planning, promotion execution, reporting, and dashboards. Users, by role, open the solution to a configurable dashboard, which follows a workflow and directs the user to the next best action. The promotion library provides an easily accessible visualization of all the promotions that have run in the past with historical performance metrics. Adding a promotion from the library to the plan is done with a click. The promotion then automatically populates with the flexibility to update fields as necessary. Impacts from changes made are immediately visible in the dashboard tile, expediting the ability to make decisions. The bill of material planning for displays feature allows users to plan displays at this level for volume and spending. This is a robust capability, pulling visibility of BOM planning into the solution for an even more accurate picture of the business for the organization. Also, Salesforce allows users to collaborate with retail partners using 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 and collaboration between these hierarchy levels (e.g., target distribution) is part of the roadmap. In addition, CRM Analytics enables further visibility of the customer/product hierarchy for reporting purposes.

Salesforce has a robust planning capability for wholesalers, indirects, and multi-tier planning. We like the ability to visually view the wholesaler and subgroup promotions on one screen. Users can also plan top-down promotional strategies from higher levels of the customer hierarchy down to planning accounts. 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 allows users to set up auto-match and auto-clear/close deductions based on organization-specific rules. Salesforce leverages links to data so users can easily access all data needed to clear claims.

TPM User Experience (UX): The Salesforce Consumer Goods Cloud solution is visually intuitive and pleasing to the eye. We like the collaborative measures built throughout the platform, encouraging work across the enterprise in one 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 give KAMs the ability to drill into the business and get to details, furthering the ability to see the state of the business faster. 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 required information on one page to manage the relationship with the customer and

drive growth for the category. CRM in the context of TPM enables the KAM to see upcoming tasks, intelligent alerts, and risks and opportunities with the customer in one place. The Account Team Channel furthers collaboration via conversation and proactive notifications. Additionally, a new item/innovation dashboard is tied into content management, giving users a view into item performance at the store level, further enriching the feedback loop on new items. Additionally, users can utilize opportunity requests as they are now embedded in the planning tab, creating efficiency for users by saving time. The incorporation of Einstein GPT takes the dashboard to the next level for prompting actions and next steps. Reporting includes a suite of preconfigured reports providing access to all relevant metrics on the fly. Salesforce also has an excellent set of standard, out-of-the-box TPM dashboards. The actionable data represents a visual display 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 with CRM Analytics using 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.

Advanced Analytics Capabilities: Analytic capabilities are strong in Salesforce. Clients can use the full capabilities of Salesforce (e.g., Lightning Report Builder, CRM Analytics, Tableau) or 3rd party vendors for reporting or analytical use cases outside of those described in TPM. Options are either standalone or embedded/integrated, supported by various Salesforce options and modern UI technologies. Reporting visibility is managed for optimal system responsiveness via thresholds for KPIs and products. For advanced analytics, Salesforce delivers a Trade Promotion Effectiveness solution based on CRM Analytics with embedded experience focusing 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 those spending types that deliver the highest margins and promotional events that may not resonate with the consumer. We like the interactive bubble graph that shows post-event ROI, featuring the ability to click on a bubble for details and showing the overall impact of the promotion on the plan. 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 on a promotion and an account level. Of note, however, is that there is currently no auto adjustment for misrepresented promotions in syndicated data, and this needs to 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 use this data to support multiple post-event analysis processes, such as promotion performance, top 10 + bottom 10 promotions, plan vs. actual, etc.

Scenario Planning allows users to compare different combinations of tactic strategies to determine an ideal promotion and view a side-by-side Promotion P&L comparison. Tactics are configurable and can handle complex multi-buys. Users can enter promotion volumes manually throughout Salesforce if desired, but the real power comes when Einstein Discovery models are used. Einstein Discovery evaluates what-if scenarios based on actionable criteria, predicting baselines with intelligent analytics powered by historical actual performance. Define the baseline and break down the actual volume to see which parameters should be changed to improve the promotion and why. The analysis outcome is reflected in a well-laid-out chart showing modeled volume, decomposition splits, and historicals all in one view. Salesforce has enhanced the promotion library to be very visual, which allows the user to see the most effective promotions at a glance. There is no out-of-the-box constraint-based optimization at this time. However, Salesforce's open API strategy allows it to incorporate optimized plans and calendars from partner solutions. Scenario comparison is at the account plan level, enabling users to compare up to five scenarios simultaneously. This enables content for collaboration with customers and contingency planning. Shortship and distribution analytics also come out of scenario planning. Users can see and mitigate potential supply chain impacts from promotions, which is another point for collaboration within the organization, leveraging the solution's capabilities.

Revenue growth management is currently executed via client-created and customized analytics dashboards. This allows clients to define and build their own reports depending on the questions they want

answered, utilizing the powerful capabilities of CRM Analytics and Einstein Discovery. POI has seen robust analysis examples in pricing, assortment, and spending. CRM Analytics allows users to build price ladder analysis reports, evaluate price pack curves, and track trends/progression in different dashboards and reports. Custom dashboards can be created 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 quickly add products to multiple customers in one channel. Partnerships with 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 continues to have an excellent UX. Simple and intuitive, yet robust, the dashboards provide a comprehensive customized view of the business. The flow is user-friendly and drives users to action. Strategic KPIs for account plans are available directly within the promotion UI. We particularly like how the lightning bot-driven Chatbot feature allows users another simple, 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-brands view enables multiple accounts and brands on the calendar view to see if your “own brands” are self-competing. 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 is the one-click access to Promotion Product Assortment, Volume Planning, Spend Planning, and Funding from anywhere in the promotion, and volume predictions are 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 enterprise segmentation of processes and data (e.g., country or division specific) within one Salesforce Org, while the business templates allow for granular configuration of business processes (i.e., different routes to market or trade term/P&L requirements) within each Sales Organization.

Integrated Business Planning (IBP): Salesforce Consumer Goods Cloud can increase or decrease the baseline due to various business reasons such as distribution changes, market changes, etc., using Customer Business Planning (CBP) or using Building Blocks on a quarterly, monthly, and weekly level. This method allows sales users to increase/decrease the baseline forecast and communicate this to a demand planning team. In addition, teams can collaborate throughout this process, 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 leverage this information when going through 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.

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 offers configuration and customization without disrupting the ability to upgrade. Modules can be enabled or disabled using configuration tools and adapted at

the business process level. The UX allows for the creation of different components based on standard Salesforce technologies.

Technology Architecture/Delivery Options: Multi-tenant SaaS.

Service Partners: Global SIs such as Accenture, PwC, Deloitte, and 15+ additional partners have been enabled globally and are ready to implement Salesforce TPM capabilities for customers of all sizes. A strategic partnership with AWS Marketplace will provide 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, TPM, Einstein Copilot, and Prompt Builder, the conversational AI assistant, provides a unique approach to supporting annual customer meetings and joint planning with more of a view to the retailer's business and suggestions on data-based next-best actions. It is complimented with Mulesoft, which provides pre-built integration accelerators for some of the most common planning and execution data sources, so users can get started faster and gain insights on critical data points cost-effectively. The focus on collaboration throughout the solution paves the way for strong adoption across the enterprise for clients implementing capabilities with Salesforce. The Salesforce ecosystem is unique in that it offers a fully connected front-office solution. Additionally, Consumer Goods Cloud is one of only a handful of vendors with Retail Execution capabilities with common data objects building upon the platform extensibility of Salesforce. It provides a flexible, configurable framework that fully automates promotion transformation and mapping at scale between trade planning and in-store execution, including product & account mappings based on promotion-type configurations. Field reps thus 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.

Opportunities: Salesforce is building a robust offering for manufacturers looking for enterprise planning capabilities. Enabling Sales Volume Planning to work up/down the customer account hierarchy would help Salesforce provide a single, integrated, top-down/bottom-up sales planning process. Another opportunity we see is for Salesforce to build out a full RGM suite rather than solely offering client-created customized dashboards. This will be important to ensure Salesforce EPx solutions are considered by manufacturers looking to implement them quickly to generate value from RGM capabilities.

Vendor Trends and Outlook: Salesforce has highly invested in its Consumer Goods Cloud TPx solution, and we see a strong roadmap for enhancing and expanding capabilities. They are making headway as they close foundational gaps and have advanced into leading innovative areas like Einstein Copilot and Data Cloud. Salesforce continues to invest in the TPx platform's user experience and analytics based on client user feedback, in addition to incorporating new generative AI capabilities. We see exciting growth opportunities, particularly with synergies across the entire Salesforce portfolio. The breadth of connected capabilities across the Salesforce ecosystem brings high value to organizations with the desire and tenacity to transform them.

Adjacent Offerings: CRM, CPF, POS data management, data-cleansing services, shelf management/ visualization, and digital merchandising. Salesforce Consumer Goods Cloud Solutions delivers integrated TPx and Retail Execution systems with common data objects, resulting in an integration-free effort between these platforms.

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

2024 Enterprise Planning Best-in-Class Category Distinctions: Collaboration - Internal; Data Management; Field & Analytics Insights; TPx UX.

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

Geographic Presence: Salesforce does not disclose this information.

Total Consumer Goods Users (seats): Salesforce does not disclose this information.

Tiers Represented: All.

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 to allow customers to configure and customize the offline mobile app. Salesforce also offers platform tools, including an application development environment to code custom extensions, a declarative framework for enhancements at the business user level (using clicks, not code), the Lightning App Builder to build 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, but 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 personas have visibility into accounts, territory performance, and key metrics on sales rep and store performance. Dashboards offer live analytics capabilities and are available offline in the mobile app, providing immediate insight into store activities along with product and category performance.

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 the operational work with insights and live reporting.

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 has an Embedded Geographical Information System (GIS) with advanced routing, visit scheduling, territory optimization, and live tracking. 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 with 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 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 rep from an order taker to an order maker. Retail and activity optimization guides stores to visit and prioritizes tasks and activities. Suggested orders streamline the ordering process, including supporting and executing promotions, as free quantities are automatically added to orders based on thresholds. Recent improvements to order management and faster order entry drive the efficiency of the calls. The simplified ordering process features penny-perfect pricing even when offline.

Out-of-the box integration with best-of-breed IR vendors provides image recognition capabilities that can detect out-of-stock and planogram compliance and serve to feed further development of analytic 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: Salesforce Consumer Goods Cloud is geared towards omnichannel engagement. Functionality is consistent across devices (mobile app, desktop) to enable Virtual Retail Execution and B2B self-service. Similar to 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 how and when they want, and all the 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 different 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 one 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.

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 on store conditions and sales rep performance. Salesforce has integrated Slack with the Consumer Goods Cloud to enable internal communications and real-time messaging. The integrated and immediate communication is vital to 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 available online and offline on mobile and desktop devices. The solution can process high levels of data from multiple internal and external sources. External data sources are easily connected to Salesforce using Mulesoft API. Salesforce provides standard reports and dashboards based on market best practices. The flexibility of the Salesforce platform and Einstein Analytics means the data model can be configured, customized, and extended to enable additional business scenarios. Additionally, CRM Analytics Mobile enables field teams to view CRM data and dashboards directly within the mobile app. Using the offline app, users can download analytics such as Territory Performance, Visit Dashboards, and Sales Rep Performance for holistic performance, execution, and monitoring - all with the same look and feel as the online version.

New Closed-Loop Promotion Planning and Execution creates a seamless promotion flow between trade promotion planning and retail execution to increase 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 thus 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 reps real-time in-store feedback so they can discuss and solve current issues with the store manager.

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 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 fuels AI models for automation, such as predictive orders or delivering necessary insights with 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.

Data Management: Consumer Goods Cloud makes configuring and customizing the offline mobile app easy. 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.

Einstein 1 is one platform and version of the truth for organizational data. Since TPM 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 success KPIs of their promotions. Salesforce Data Cloud enables companies to integrate structured and unstructured data into Salesforce with a library of connectors and zero-copy integration from third-party data lakes such as Snowflake, Redshift, BigQuery, and Databricks. It enables companies to connect trapped data across applications like Marketing Cloud, Commerce Cloud, Loyalty Management, ERP, and social media into a holistic, single-customer view. Companies can cross consumer data with retailer data to get AI-powered insights about the next best action or recommendations. Insights can be used to segment audiences and personalize the B2B2C experience.

The new Data Cloud Kit for Consumer Goods combines Consumer Goods Cloud and Data Cloud to create a single source of truth across B2B and B2C. It brings together first-party and third-party data, as well as 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 allows API extensibility to integrate Consumer Goods Cloud with other TPM, ERP systems, and other data sources. Any change in the information will flow automatically to the Consumer Goods Cloud and mobile app. In addition, the Salesforce partner ecosystem and the AppExchange offer a variety of tools to connect data from any system with clicks, not code.

Strengths & Key Differentiators: Salesforce's Omnichannel Engagement supports hybrid retail coverage across reps, telesales, merchandisers, and even self-service capabilities. One key differentiator is the offline mobile app, which ensures field reps can stay connected regardless of location. Loyalty program capabilities further strengthen this. With Einstein 1, Salesforce's embedded generative AI, predictive AI, and analytics capabilities provide teams with actionable insights and save time addressing tasks, allowing more time to sell. The flexibility of the Salesforce platform is a strength, allowing customers to build, integrate, and extend solutions as needed. Salesforce offers a unified view of customer interactions across channels to help organizations deliver exceptional customer experiences, driving 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. 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.

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

Vendor Trends & Outlook: The Salesforce platform is widely used across CPG organizations and has grown from a standalone CRM tool into a broader Salesforce ecosystem. Salesforce Consumer Goods Cloud was first launched in 2019 to bring together key functionality for CPG manufacturers and deliver efficiency and effectiveness across organizations. Data Cloud enables businesses to connect trapped data across applications into one centralized source, giving employees a holistic view of data. Salesforce continues to invest and strengthen retail execution and the organization's overall portfolio and performance, incorporating new AI capabilities to optimize business processes.

Adjacent Offerings: TPx, 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 utilizing the Salesforce ecosystem. Your organization desires to leverage AI-enabled insights to guide field activities. Also, if you are seeking a solution to support a hybrid model for retail coverage, including self-service capabilities.

2024 RetX Best-in-Class Distinctions: Connected Enterprise; Data Management; Desktop UX; Internal Collaboration; Omnichannel Engagement - (eCommerce/B2B/DTC/Tele-virtual).