

Transforming Trade Promotions with AI-Led Precision for a Global Food & Beverage Giant

Case Study

Business Impact

5.2% ↑
in incremental
sales

35% ↑
in forecast accuracy

90% ↓
manual deduction
backlogs

60% ↓
In Cycle time

Problem Statement

The client was using manual accrual spreadsheets, which often introduced re-keying errors, missed deductions, and write-offs. Their baseline estimates varied widely across geographies, with inconsistent assumptions. Rapid inflation and short promo cycles made pricing and planning highly volatile. Additionally, multi-tier discount structures and region-specific promotions added layers of complexity. Their existing tools could not simulate cannibalization, test new promo mechanics, or support D2C levers, resulting in underperforming promotional ROI and reduced visibility into performance across SKUs and regions.

Solution Overview

- Automated collection of spend and sales data through system connectors, eliminating manual data entry.
- Introduced validation-driven templates to reduce human error and standardize planning across business units.
- Developed ML baselines and elasticity curves to predict uplift and uncover ROI patterns.
- Scenario-Based "What-If" Engine – Enabled simulation of promo timing, depth, bundling, and mix strategies to guide investment decisions.
- Built role-based approval flows to ensure budget alignment and category-level oversight.
- Created real-time compliance tracking with auto-generated retailer forms and deduction backlogs.
- Segregated user access by brand, region, and channel with full version histories and ERP-synced settlements.