



PROMOTION EXCELLENCE FRAMEWORK

A practical, repeatable model for planning effective promotions, from first calendar to closed-loop insight.

PLAN PROMOTIONS LIKE THE BEST RETAILERS DO.

Great promotions are not luck. They are the product of clear planning, structured events, commercially sound offers, genuine vendor partnership, reliable execution, and honest measurement. This framework turns that discipline into something you can use on Monday morning: a self-assessment to see where you stand today, a six-part model to work through with your teams, and twelve rules to keep you honest.

01	PROMOTION EXCELLENCE SCORECARD	Page 03
	A six-area maturity assessment. Score yourself from 0 to 3, find your total, and see exactly where to focus first.	

02	THE PROMOTION EXCELLENCE MODEL	Page 05
	Six pillars, each with objectives, a working checklist, and an improvement pathway you can follow at any maturity level.	

03	12 GOLDEN RULES FOR HIGH-IMPACT PROMOTIONS	Page 08
	The hard-won principles that separate promotions that grow the business from busywork that does not.	

HOW TO USE THIS FRAMEWORK

Start with the scorecard as a team. Be honest about how you work today, not how you wish you worked. Use your lowest-scoring pillars to choose where to focus this quarter. Revisit the scorecard each planning cycle and watch your total climb.

01

SECTION ONE

PROMOTION EXCELLENCE SCORECARD

A self-assessment tool. Rate your organisation from 0 to 3 in each of the six pillars below. Find the description that best reflects how you actually work today, then write your score in the box. Fill it in on screen or print it to complete by hand.

PILLAR	0 · AD HOC	1 · BASIC	2 · STRUCTURED	3 · INTELLIGENT
PLANNING	Spreadsheet-based	Calendar exists	Multi-team visibility	Optimised via insights
EVENTS	Undefined	Simple campaigns	Fully structured	AI-recommended structures
OFFERS	Manual entry	Template-based	KPI-validated	AI-assisted & collision-aware
VENDOR	No structure	Email-based fund	Integrated fund	Real-time vendor portal
EXECUTION	Manual entry	Batch exports	Multi-system, Fully integrated	Real-time event-driven
INSIGHTS	None	Basic reporting	KPI dashboards	Predictive analytics

PLOT YOUR MATURITY PROFILE

Write your level (0–3) for each pillar, then add them up. Go to the next page to find what your total means and where to focus first.

PLANNING + EVENTS + OFFERS + VENDOR + EXECUTION + INSIGHTS
 + + + + +

YOUR TOTAL / 18

01

SECTION ONE • CONTINUED

HOW TO SCORE YOURSELF

Step

01

READ THE DESCRIPTIONS FOR EACH MATURITY LEVEL

For every area there are four maturity descriptions, from unstructured to intelligent:

- **0 • Ad hoc.** Unstructured, manual, inconsistent.
- **1 • Basic.** Some structure, still limited.
- **2 • Structured.** Governed, repeatable, multi-team visibility.
- **3 • Intelligent.** Automated, AI-supported, insight-driven.

Step

02

COMPARE YOUR CURRENT PROCESS TO THE DESCRIPTIONS

Ask the team to answer honestly: *"Which row best reflects the way we actually work today?"*

Whichever description matches closest is your score. For example, if your offers are created using templates but you do not simulate KPIs yet, your score is 1 (Basic).

Step

03

SCORE EACH OF THE SIX PILLARS FROM 0 TO 3

You will end up with six numbers, one for each of Planning, Events, Offers, Vendor, Execution, and Insights. Together they become your maturity profile.

Step

04

ADD THE SIX SCORES FOR YOUR TOTAL MATURITY SCORE

The total possible score is 18 (six pillars at a maximum of 3 each). Find your band below.

TOTAL SCORE	MATURITY CATEGORY	WHAT TO DO NEXT
0–6	Early / Ad hoc	Start with structure before anything else.
7–11	Developing	Focus on governance and financial rigour.
12–15	Advanced	Activate AI capabilities and vendor collaboration.
16–18	Intelligent / Best-in-class	Sustain through continuous measurement.

Step

05

IDENTIFY YOUR BIGGEST OPPORTUNITIES

Pillars that scored **0 or 1** are your quick-win improvements. Pillars at **2** are ready for optimisation. Pillars at **3** are strengths to build upon. Pick one or two to take into the model that follows.

02

SECTION TWO

THE PROMOTION EXCELLENCE MODEL

Six pillars that take a promotion from first calendar to closed-loop insight. Each pillar lists its objectives, a working checklist to tick off, and an improvement pathway for wherever you sit today.

1 PLANNING

"Start with clarity, not spreadsheets."

OBJECTIVES

- Align promotion goals to business strategy (growth, margin, traffic, category focus).
- Build a 12-month promotional calendar that is visible across teams.
- Define constraints (budget, category priorities, store operational limits).
- Establish a governance model with clear ownership and sign-off authority per tier.

CHECKLIST

- ☐ Annual promo calendar created and shared across functions
- ☐ Category targets set and linked to financial KPIs
- ☐ Stakeholders aligned (Marketing, Commercial, Stores, Vendors)
- ☐ Promotion governance model documented
- ☐ Budget allocation per event type confirmed

SCORE 0-1

Start with a shared visual calendar. Eliminate private spreadsheets.

SCORE 2

Add financial targets per promotion tier and automate constraint alerts.

SCORE 3

Move to insight-driven planning using prior-year performance data.

2 EVENTS

"Turn ambition into organised campaigns."

OBJECTIVES

- Convert high-level plans into structured events with campaign blocks.
- Map channels, timings, segments, and operational touchpoints.
- Define approval flows and governance using consistent statuses.
- Ensure event structures support multi-channel execution from the outset.

CHECKLIST

- ☐ Event blocks defined (leaflet, email, store, digital)
- ☐ Media allocation completed per block
- ☐ Status governance defined (WIP, Review, Release)
- ☐ Channel-specific requirements captured at event level
- ☐ Collision detection rules configured

SCORE 0-1

Standardise event templates. Define at least three status stages.

SCORE 2

Implement role-based status transitions and block-level channel mapping.

SCORE 3

Use AI-recommended event structures based on seasonal performance patterns.

3 OFFERS

"Design offers that are compelling and commercially sound."

OBJECTIVES

- Use templates to accelerate offer creation and ensure consistency.
- Simulate financial impact early (margin, uplift, cost-to-serve).
- Use AI to improve speed and quality: offer text, product suggestions, collision checks.
- Tag every offer for post-campaign segmentation (Value, Premium, Traffic, Margin).
- Apply the "previous lowest price" compliance check before publishing.

CHECKLIST

- ☐ Mechanics selected from standard templates
- ☐ Product and location groups confirmed
- ☐ Financial KPIs simulated and validated
- ☐ Tags added for segmentation and future insight
- ☐ AI-generated offer text reviewed and approved
- ☐ Collision check run before submission
- ☐ Regulatory price compliance confirmed

SCORE 0-1

Introduce mandatory offer templates. Stop accepting free-text offers.

SCORE 2

Mandate financial simulation before status advancement.

SCORE 3

Leverage AI for product recommendations, auto-text, and collision resolution.

4 VENDOR COLLABORATION

"Build promotions with vendors, not just for them."

OBJECTIVES

- Engage vendors early in the promotion planning cycle.
- Capture and track vendor funding commitments alongside offer costs.
- Create a transparent, auditable record of co-investment agreements.
- Reduce dependency on manual email chains and offline negotiations.

CHECKLIST

- ☐ Vendor funding targets set per campaign
- ☐ Vendor funding amounts captured per offer (amount or percentage)
- ☐ Vendor portal access configured for key suppliers
- ☐ Funding linked to condition contracts in SAP
- ☐ Multi-currency funding support confirmed

SCORE 0-1

Move vendor negotiations into a system. Capture funding in writing.

SCORE 2

Integrate vendor funding amounts into financial simulation at offer level.

SCORE 3

Enable a vendor-facing portal for collaborative planning and real-time updates.

5 EXECUTION

"Deliver your offers everywhere, consistently."

OBJECTIVES

- Distribute offers seamlessly to execution systems (OPPS, ERP, digital channels).
- Ensure version control and clean updates across all downstream systems.
- Track the success and failure of each export action.
- Support real-time, event-driven distribution using SAP Event Mesh integration.

CHECKLIST

- ☐ Export scenarios defined per channel
- ☐ OPPS and downstream systems mapped
- ☐ Exports validated with status tracking
- ☐ Audit trail captured
- ☐ Event-driven export triggers configured (not just batch)
- ☐ Independent export per system confirmed (no cascading dependencies)

SCORE 0-1

Define at least one export scenario per system. Eliminate manual handovers.

SCORE 2

Automate exports on status change. Track every export with logs.

SCORE 3

Move to real-time event-driven export using SAP Event Mesh.

6 INSIGHTS

"Close the loop: plan, measure, improve."

OBJECTIVES

- Measure effectiveness (uplift, margin, sell-through, ROI).
- Compare event and offer performance across time, channels, and regions.
- Feed learnings into the next cycle and enhance future-year planning.
- Analyse cannibalisation, halo effects, and stockpile behaviour for true ROI.
- Use anomaly detection to catch underperforming promotions in-flight.

CHECKLIST

- ☐ Insights reviewed across offers post-campaign
- ☐ Underperforming mechanics flagged and remediated
- ☐ Learnings fed into next planning cycle
- ☐ Annual plan updated based on results
- ☐ Cannibalisation and halo analysis run per campaign
- ☐ Sales actuals imported for financial reconciliation

SCORE 0-1

Start with a basic offer-level export report. Review weekly.

SCORE 2

Implement KPI dashboards with cross-campaign comparability.

SCORE 3

Activate predictive analytics: anomaly detection and promo effectiveness models.

03

SECTION THREE

12 GOLDEN RULES FOR HIGH-IMPACT PROMOTIONS

Print these and put them on the wall. They are the principles that separate promotions that grow the business from busywork that does not.

- | | | | |
|-----------|--|-----------|---|
| 01 | Start planning earlier than feels necessary. | 02 | Treat promotions as a strategic growth lever, not admin work. |
| 03 | Build fewer, stronger promotions rather than many weak ones. | 04 | Use templates for speed, governance, and brand consistency. |
| 05 | Simulate financials before committing: margin first, volume second. | 06 | Separate event planning from offer creation to avoid timeline compression. |
| 07 | Build promotions with vendors, not for them. Involve them at the planning stage. | 08 | Capture vendor funding in the system, not in email threads. |
| 09 | Use tags. They are the key to insight and segmentation later. | 10 | Keep offer data clean and structured. Avoid free-text fields wherever possible. |
| 11 | Always review execution results before repeating an offer. Close the loop. | 12 | Use AI as a co-pilot, not a replacement. Review every AI recommendation before approving. |

TAKE THE NEXT STEP

LET'S PLAN YOUR NEXT PROMOTION TOGETHER.

You have the framework. When you are ready to put it to work on your own data and systems, our team is here to help, with no obligation.



BOOK A DISCOVERY CALL

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minutes, no commitment.



COMMERCIAL BRIEFING

Scope, cost, migration
options, and ROI for your
organisation.



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International Retail Forum ·
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Hotel.

**Plan fewer, stronger promotions. Measure
every one. Improve every cycle.**

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