

Driving Connected Trade Promotion Planning & Gross-to- Net Visibility for a Global Plant-Based Food Company with Anaplan



Client Overview

The client is a leading Sweden-based global plant-based food company with operations spanning multiple regions, business units, customer chains, and product categories. As the organization expanded globally, managing **trade promotions, rebates, accruals, pricing structures, and Gross-to-Net (GTN) reporting** became increasingly complex.

Its legacy planning environment relied on **disconnected systems, manual reconciliations, and spreadsheet-driven workflows**, limiting visibility into promotional performance, financial tracking, and settlement management.

To modernize commercial planning and improve financial governance, the organization partnered with **Polestar Analytics** to implement a connected **Trade Promotion Management (TPM) and Gross-to-Net planning solution on Anaplan**. The transformation enabled centralized planning, automated workflows, real-time integrations, and enhanced financial visibility across the complete promotion lifecycle.



Key Challenges

As the client scaled its global operations and promotional planning activities, several operational and financial inefficiencies began impacting visibility, agility, and decision-making.

Disconnected Planning & Data Silos

Demand planning, promotions, pricing, and financial reporting operated across disconnected systems, creating heavy manual dependencies.

- Manual movement of demand and planning data between systems
- Frequent reconciliation and version mismatch issues
- Delayed visibility into commercial performance
- Lack of a unified planning environment

Limited Gross-to-Net Visibility

The organization lacked a centralized view of promotional spend, rebates, accruals, and net sales performance.

- No real-time Gross-to-Net reporting
- Limited visibility into promotion effectiveness and margins
- Manual consolidation of financial and promotional data
- Difficulty tracking spend against budgets



Key Bottlenecks

Manual Promotion & Settlement Processes

Promotion execution and settlement tracking relied heavily on spreadsheets and offline workflows.

- Manual booking and rebooking processes
- Delayed approvals and settlement tracking
- Higher risk of data-entry and reconciliation errors
- Limited transparency into promotion lifecycle status

Complex Multi-Dimensional Planning

Managing promotions across customers, SKUs, regions, and currencies introduced significant planning complexity.

- Weekly-level planning across multiple forecast versions
- High SKU × Customer × Region planning granularity
- Multi-currency reporting and consolidation challenges
- Scalability limitations in the legacy planning environment

Governance & Compliance Challenges

The absence of standardized workflows and audit mechanisms increased operational and compliance risks.

- Limited auditability across promotion approvals and closures
- Inconsistent governance workflows across teams
- Lack of automated approval controls
- Challenges in maintaining SOX-compliant processes



Solutions Implemented

Polestar Analytics implemented a connected **Trade Promotion Management (TPM)** and **Gross-to-Net planning solution on Anaplan**, unifying demand planning, pricing, promotions, accruals, settlements, and financial reporting into a single connected ecosystem.

- **Connected Trade Promotion Management**

Implemented a centralized Trade Promotion Management (TPM) framework to streamline promotion planning, approvals, accruals, and settlement workflows across regions and customer hierarchies.

Enabled fixed, variable, rebate, and listing fee promotions

Configured automated approval workflows and spend thresholds

Introduced project-based promotion tracking and visibility

Enabled Gantt-based monitoring of active and planned promotions

This improved promotion governance, execution visibility, and control over promotional spend.

Solutions Implemented

- **Automated Gross-to-Net Reporting**

Built a connected Gross-to-Net (GTN) reporting framework integrating demand, pricing, promotions, rebates, and actuals into a unified financial view.

Delivered Forecast, Budget, and Actual +Forecast GTN reporting



Enabled multi-currency reporting with global consolidation



Automated calculation of net sales and promotional impact



Improved visibility into margins and promotional performance



This enabled finance and commercial teams to operate with a single source of truth for GTN planning and reporting.

- **Integrated Data and Workflow Automation**

Established a connected integration framework across ERP, demand planning, and reporting systems to eliminate manual dependencies and improve operational efficiency.

Integrated D365, Demand Planning, DataLake, and Power BI



Automated booking and rebooking file generation



Enabled daily settlement and accrual balance feeds



Reduced manual reconciliation and spreadsheet-driven processes



This improved data accuracy, accelerated planning cycles, and enhanced operational agility.

Solutions Implemented

- **Advanced Pricing and Margin Management**

Implemented centralized pricing, rebate, and profitability management capabilities to improve financial visibility and planning precision.

Centralized pricing, rebates, and discount management



Enabled COGS and contribution margin



Introduced SKU-level profitability visibility



Supported budgeting and scenario planning across versions

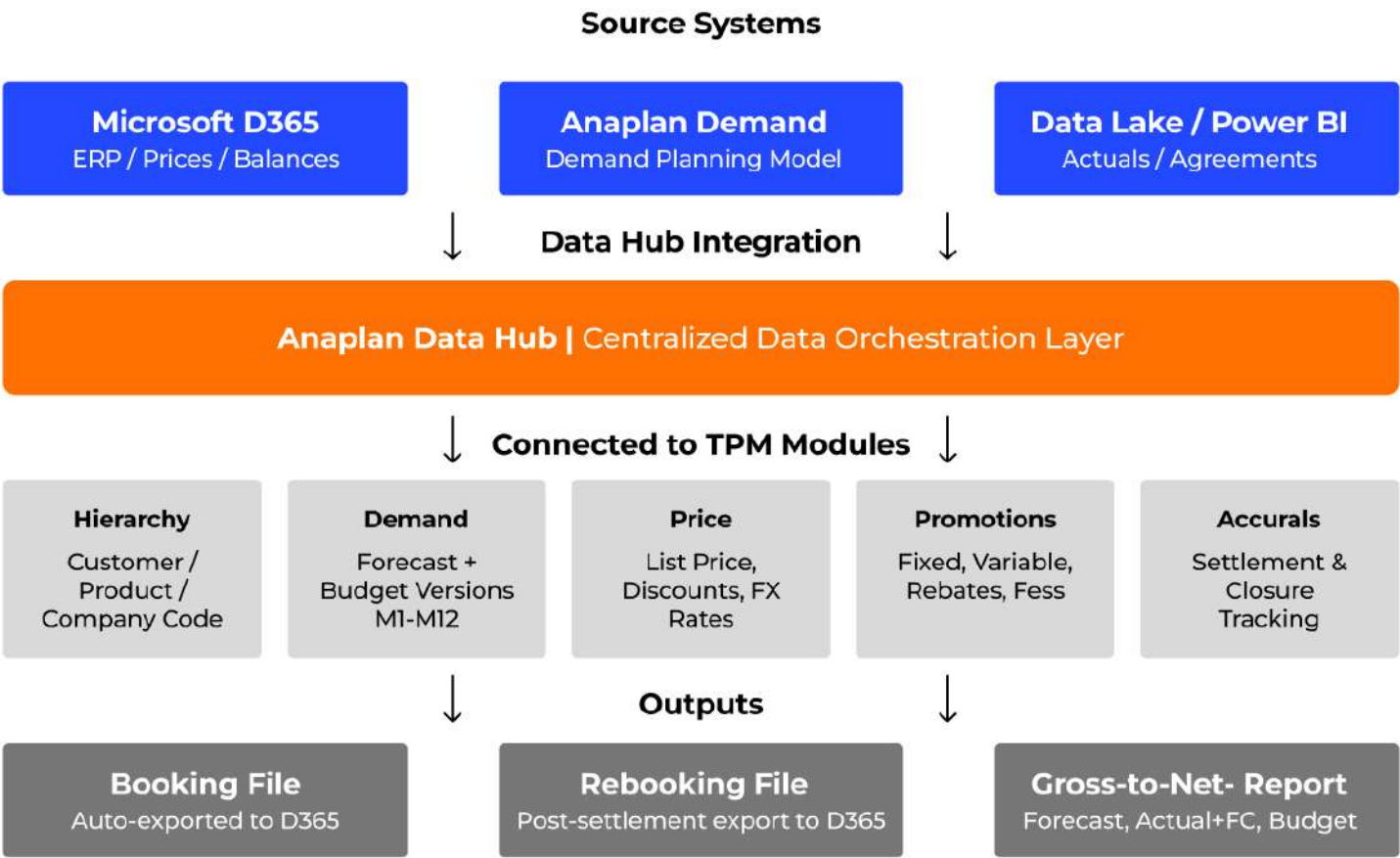


This enabled more accurate financial planning and improved margin visibility across products and customers.



Our Solution Framework behind this transformation

Architecture Overview



Business Impact

600k

in savings achieved by reducing **obsolete inventory** across the organization's operations

60%

reduced manual effort across booking, rebooking, reconciliation, and settlement workflows through end-to-end process automation

Enabled **40%** **faster planning and reporting cycles**, empowering commercial and finance teams with quicker, data-driven decision-making

Strengthened promotion governance and financial control with **SOX-compliant audit trails, automated approvals, and real-time accrual tracking**

Improved promotional spend visibility and tracking accuracy by

25%

across customer, SKU, and regional hierarchies

Enabled real-time integration across **D365, demand planning, and financial reporting systems**, significantly reducing reconciliation delays and data inconsistencies

About **Polestar Analytics**

Polestar Analytics is a leader in Data, Analytics, AI, and Enterprise Planning helping organizations to unlock intelligent outcomes through our proprietary products like 1Platform, accelerators, and services. Our expertise spans data engineering, data science, agentic and generative AI, and advanced planning for CPG/Retail, Pharmaceuticals, Manufacturing, IT/ITeS, and Financial Services.

Reach out to us today!