

IBM COGNOS PERFORMANCE BLUEPRINT: RETAIL STRATEGIC PROMOTION & MARKETING PLANNING IMPLEMENTATION GUIDE



A WEB-BASED
PERFORMANCE
MANAGEMENT
APPLICATION

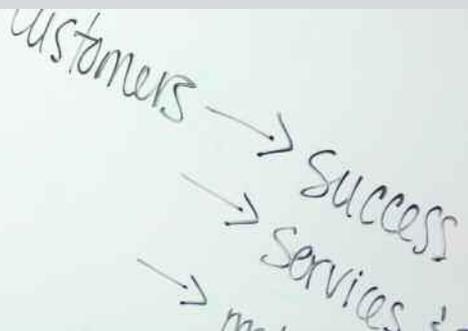
OVERVIEW

Retailers have traditionally struggled with promotions and vendor deal planning because they lack the complete view of company-wide activities, making it very difficult to accurately gauge how to optimize the promotional mix across the chain. *The IBM Cognos Strategic Promotion & Marketing Planning Performance Blueprint* provides a complete performance management framework that enables retailers to accurately and confidently plan, measure, and report on their promotional activities so they can achieve a competitive advantage while protecting margins.

The promotions planning process needs to be collaborative and extend to all stakeholders within the organization, providing value to marketing executives as well as marketing managers, merchandisers, and buyers. Performance management systems allow management to articulate goals and provide a measurement process so performance against goals can be tracked and feedback provided.

This Implementation Guide demonstrates a Web-based process for allocating marketing spend, and managing internal promotion and vendor deal planning using IBM Cognos 8 Planning and IBM Cognos 8 Business Intelligence. It provides an overview of model design and complexities to be used as a guide for its implementation in a customer environment.

The models and processes described in this document are generic for retail strategic promotional planning in North America, but can be configured to support alternative model requirements and to accommodate planning in any country.



Blueprint Objectives

Marketing and promotional costs can significantly impact a retailer's top and bottom lines. The *IBM Cognos Strategic Promotion & Marketing Planning Blueprint* empowers managers and executives across the retail chain to model multiple scenarios, then analyze and evaluate the success of their promotions enabling more efficient use of company and trade dollars to ultimately drive higher returns. Through this *Blueprint*, senior executives can best determine company-wide marketing spend, strategically allocating funds to banners, region, or types of marketing activities. Marketing and merchandise managers can plan retailer-funded promotional campaigns that will lead to the greatest return on their investment. Buyers, merchandisers, and category managers can plan the best use of trade funds and monitor promotion effectiveness as well as vendor compliance to remittance terms.

The *Blueprint* delivers an intuitive top-down and bottom-up planning and reporting environment where retailers can capitalize on:

- An integrated planning process between finance, marketing, and merchandising, ensuring all departments have visibility to promotions and are working towards common objectives.
- Built-in calendaring that provides organization-wide visibility into planned promotional activities.
- The ability to perform analysis on historical promotions and then use the results to drive future campaigns and optimal promotional mix.
- Rapid re-forecasting capabilities that empower chains to adjust their promotional mix and campaigns “on-the-fly” based on performance and consumer responses to date.
- A fast consolidation process that reduces planning cycles and allows chains to react quickly to new vendor-sponsored opportunities, address market trends, and counter competitive actions.
- Embedded workflow functionality, complete with alerting capabilities, helping drive collaboration and accountability, while streamlining the approval and monitoring process.
- Compliance monitoring capabilities to improve control over trade funds and accelerate reimbursements due from vendors.

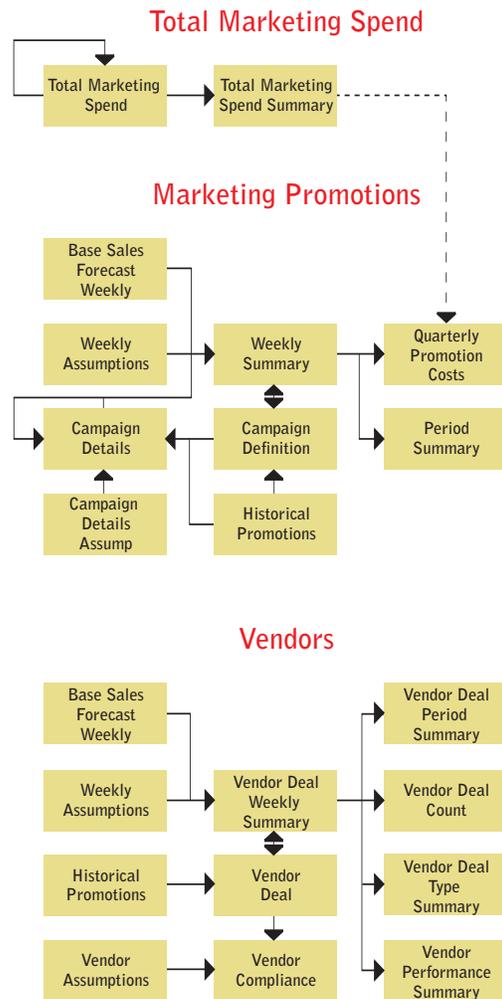
In addition to the benefits specific to the *Blueprint*, the IBM Cognos 8 Planning solution provides significant benefits to an organization through its inherent capabilities:

- Flexible model development to support a wide variety of models.
- Web- or Excel-based deployment of models for data collection and consolidation.
- Easy version control.
- Real-time workflow to drive collaboration.
- Real-time consolidation.
- Real-time reporting.
- Real-time calculations in the browser for immediate results.
- Audit and user textual annotations at the cell, worksheet, and model levels to further drive collaboration.
- Drop-down validation lists to ensure data consistency.
- Scalable architecture with proven deployments to thousands of users.
- Linking functionality to provide divergent, yet interrelated planning capabilities.
- Off-line capabilities.
- Custom date capabilities with no time dimension limits, to allow planning by week, season, period, quarter, or year.
- Unique multi-directional calculation engine to allow input across any dimension at the detail level or the total level.

Model Design Overview

Model Flowchart

The process for strategic promotion planning occurs in stages. The first step includes top-down total marketing spend targets set by corporate marketing executives for promotion types. This process sets targets for promotion types by banner. The targets are then linked to the marketing promotion portion of the model in which bottom-up detailed promotions are planned, resulting in a variance analysis to target. Finally, the vendor portion of the model includes the ability to plan promotional campaigns for each vendor arrangement, including performance results and compliance by vendor.

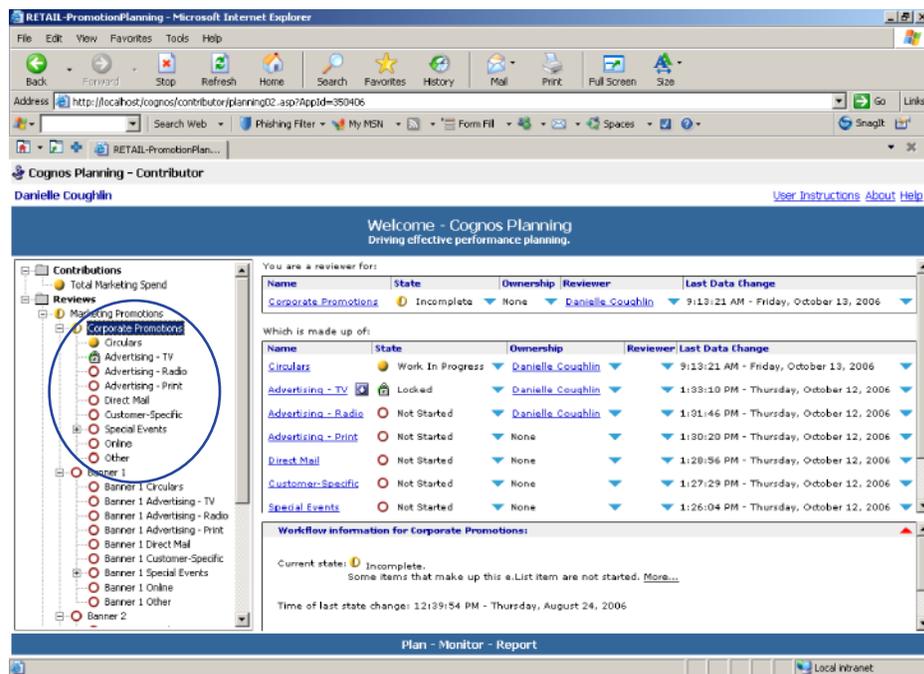


Real-Time Workflow Visibility

As marketing and merchandising professionals are planning and validating promotions, upper level managers have real-time visibility to the workflow status of that information. In this *Blueprint*, promotional planning could be performed by banner for each campaign type, or by campaign type for each banner. The owners would be Total Banner or Total Campaign type, respectively, and would be considered “reviewers.” These reviewers can see the workflow status of each banner or campaign, and can be co-owners of that information, allowing them to make edits as required. All workflow status changes, data consolidations, and aggregations occur in real time as the information is saved by the end user, making frequent planning iterations possible.

Before data is entered, the state of the plan is designated as  **Not Started**. Once a plan is saved, the state becomes  **Work In Progress** and remains accessible for further editing. When an item is submitted, the plan is Locked and no more changes can be made. The  **Locked** state indicates that the plan is ready for review. A reviewer can review the plan in any state, but can only reject a Locked plan item. When a Locked plan is rejected, it returns to a state of Work In Progress, making it editable once again for the owner of that plan.

The following is an example of the workflow in which the Total Banner is the reviewer, and campaign types are planned within that banner.



The screenshot displays the Cognos Planning Contributor interface. The left sidebar shows a tree view of contributions, with 'Corporate Promotions' selected and circled in blue. The main content area shows a summary table for 'Corporate Promotions' and a detailed table for its sub-items.

Name	State	Ownership	Reviewer	Last Data Change
Corporate Promotions	 Incomplete	None	Danielle Coughlin	9:13:21 AM - Friday, October 13, 2006

Name	State	Ownership	Reviewer	Last Data Change
Circulars	 Work In Progress	Danielle Coughlin		9:13:21 AM - Friday, October 13, 2006
Advertising - TV	 Locked	Danielle Coughlin		1:33:10 PM - Thursday, October 12, 2006
Advertising - Radio	 Not Started	Danielle Coughlin		1:31:46 PM - Thursday, October 12, 2006
Advertising - Print	 Not Started	None		1:30:20 PM - Thursday, October 12, 2006
Direct Mail	 Not Started	None		1:28:56 PM - Thursday, October 12, 2006
Customer-Specific	 Not Started	None		1:27:29 PM - Thursday, October 12, 2006
Special Events	 Not Started	None		1:26:04 PM - Thursday, October 12, 2006

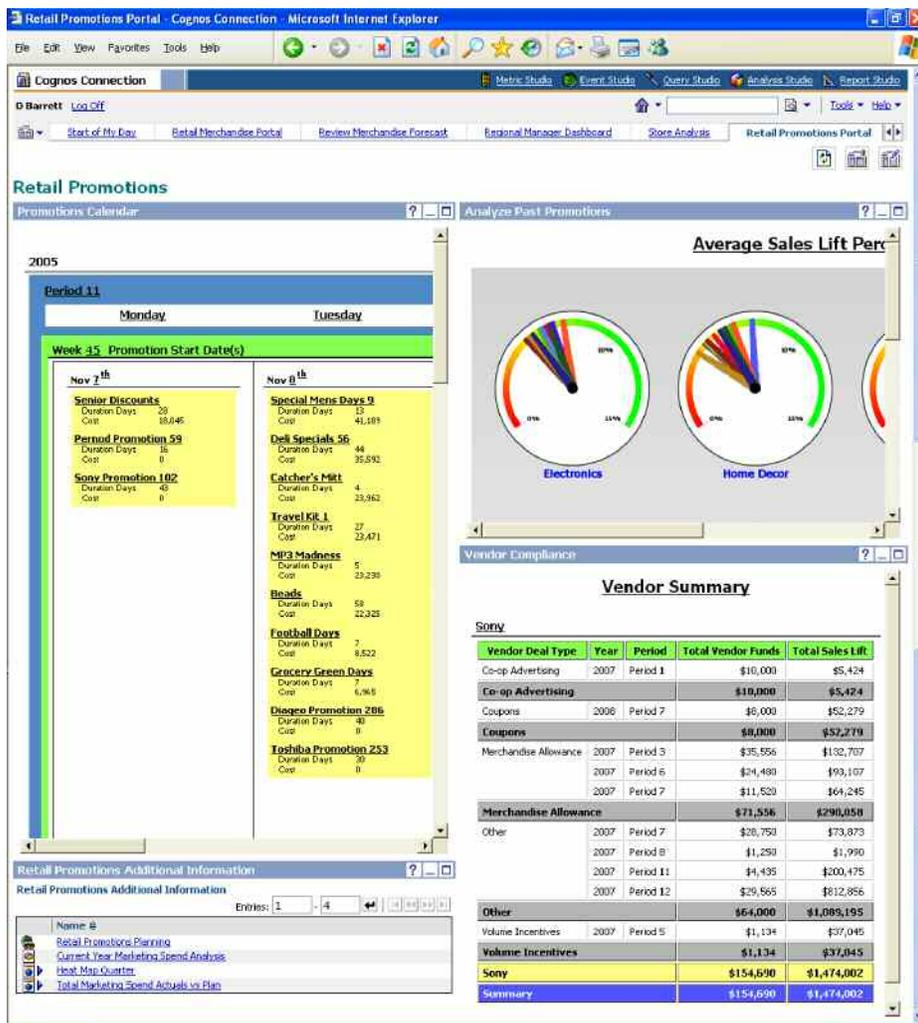
Workflow information for Corporate Promotions:
Current state:  Incomplete.
Some items that make up this e>List item are not started. [More...](#)
Time of last state change: 12:39:54 PM - Thursday, August 24, 2006

Representative Workflow

The following sections of this implementation guide describe the process in which marketing and merchandising professionals participate in the planning process.

Retail Promotions Portal

Logging into the Retail Promotions Portal offers users three prompted reports, including a promotions calendar on the upper left, a sales lift report by promotion type for each department on the upper right, a vendor compliance summary at the lower right, and links to other reports and IBM Cognos 8 Planning at the lower left.



Drilling into the promotional calendar on the upper left side of the portal page gives users the ability to examine past promotions, including target geographies and timeframes, along with sales lift and promotion cost to determine whether a promotion is worthy of repeating in the promotional forecast.

Retail Promotions Calendar Detail - Cognos Viewer - Microsoft Internet Explorer

Address: http://cognosdemo/cognos8/cgi-bin/cognosapi.dll

Promotion Detail

MP3 Madness

Geography	Department	Promotion Description	Start Date	Overall	Sales Lift	Costs
Northeast	Electronics	MP3 Madness	Nov 8, 2005	Duration: 5 Budget Promotion Costs: \$17,052 Actual Promotion Costs: \$23,230 Promotion Cost Variance: (\$6,178)	Actual Sales Lift %: 1.0% Budget Sales Lift %: 2.0% Sales Lift Variance %: -1.0% Actual Sales Lift: 22,992 Budget Sales Lift: 12,353 Sales Lift Variance: 10,639	Creative %: 12.2% Creative: \$2,814 Mailing %: 17.3% Mailing: \$4,030 Production %: 10.2% Production: \$2,370 Labor %: 15.3% Labor: \$3,556 Printing %: 12.2% Printing: \$2,814 Fees %: 5.1% Fees: \$1,185 Lists %: 16.3% Lists: \$3,793 Other %: 11.2% Other: \$2,607 Total Campaign %: 100% Total Campaign: \$23,230

Feb 1, 2007 - 1 - 9:30:49 AM

Users can also expand the sales lift percent report to see an analysis of the success of each campaign type by department, and can then use that analysis to determine a campaign strategy for the promotional forecast.



Drilling into the sales lift report produces a list of historical promotions by category that can be sorted based on metrics such as sales lift, promotion cost, or promotion margin. This report provides alerts when promotions produce a negative margin.

Historical Promotions - Cognos Viewer - Microsoft Internet Explorer

Address: http://cognosdemo/cognos8/cg-bin/cognosapi.dll

Historical Promotions

Promotion Description	Promotion #	Department	Geography	Start Date	Duration	Rank Sales Lift	Sales Lift	Rank Promotion Costs	Promotion Costs	Rank Promotion Margin	Promotion Margin
Lightning is no Friend	Historical Promotion 197	Electronics	East	Jun 21, 2005	7	2	\$49,423	5	\$12,543	1	\$36,880
Electronic Blowout 3	Historical Promotion 149	Electronics	Midwest	May 23, 2004	7	4	\$35,711	8	\$4,097	2	\$31,614
Get Your Electronics Now	Historical Promotion 276	Electronics	Southeast	May 11, 2006	7	5	\$31,794	9	\$1,280	3	\$30,514
Pod 4	Historical Promotion 064	Electronics	Northeast	Sep 7, 2004	7	3	\$46,232	4	\$20,338	4	\$25,894
Pod 4	Historical Promotion 200	Electronics	Midwest	Jul 5, 2005	7	1	\$49,502	1	\$35,119	5	\$14,383
DVD Sale 3	Historical Promotion 015	Electronics	All Geographies	Oct 5, 2002	7	6	\$22,728	6	\$10,366	6	\$12,362
Winter Electronics Days	Historical Promotion 032	Electronics	Southeast	Feb 23, 2003	7	8	\$10,258	7	\$9,993	7	\$265
Special Electronics Days 7	Historical Promotion 111	Electronics	Northeast	Jul 14, 2006	7	7	\$18,860	3	\$25,810	8	(\$6,950)
MP3 Madness	Historical Promotion 247	Electronics	All Geographies	Apr 27, 2002	7	9	\$2,278	2	\$29,095	9	(\$26,817)

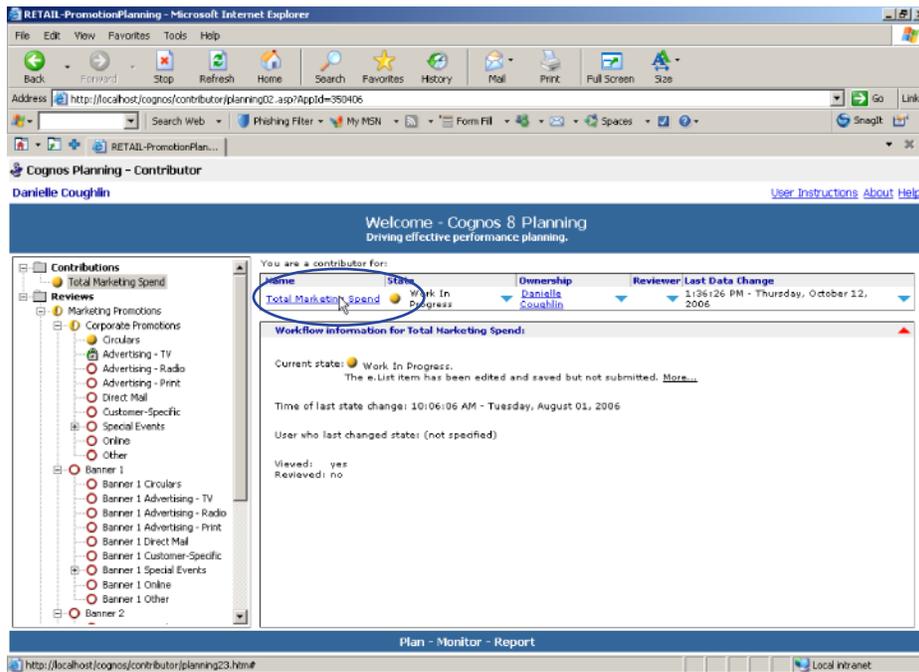
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Done Local intranet

Total Marketing Spend

Users can then open the Strategic Promotion & Marketing Planning forecast through the link from the portal page—based on the analysis of historical promotions—to update the promotional forecast in IBM Cognos 8 Planning.

The first step in updating the forecast in the *Blueprint* takes place within the Total Marketing Spend item in the hierarchy. This level of the hierarchy provides the ability for marketing management to set top-down targets for promotional spending by banner and by campaign type.



Upon clicking Total Marketing Spend on the Contributor home page, a view is provided which includes three tabs, two of which are used for top-down planning: **Total Marketing Spend** and **Total Marketing Spend Summary**. These two tabs are applicable only to the Total Marketing Spend item in the hierarchy; security established by the system administrator prevents other items in the hierarchy from accessing those tabs.

The first tab is called **Total Marketing Spend**. This tab is made up of five dimensions: Marketing and Vendor Hierarchy, Promotion Types, Banners, Quarters, and Total Marketing Spend. In this tab, users are provided with historical information about marketing spend per campaign type, per banner, and by quarter. Historical actuals are the basis for the current year promotional planning at a total campaign level by banner and by quarter. Users can make adjustments to that information, as shown in the example below.

	Historical Spend Actuals	Historical Spend Plan	Historical Spend Variance	Recommended Marketing Spend	Marketing Spend Adjustment	Final Marketing Spend
Total Marketing Spend	\$1,356,923	\$1,297,317	\$(99,606)	\$1,356,923		\$1,356,923
Circulars	\$56,923	\$102,317	\$5,394			
Advertising - TV	\$129,231	\$102,317	\$(26,914)			
Advertising - Radio	\$84,615	\$76,738	\$12,122			
Advertising - Print	\$193,846	\$157,411	\$(36,436)			
Direct Mail	\$129,231	\$127,896	\$(1,335)			
Customer Specific	\$129,231	\$153,475	\$24,245			
One-day Sales	\$258,462	\$204,634	\$(53,828)			
End-of-Season Sales	\$84,615	\$76,738	\$12,122			
Seasonal Sales	\$84,615	\$81,198	\$(13,457)			
Online	\$56,923	\$102,317	\$5,394			
Other	\$129,231	\$102,317	\$(26,914)			

	Historical Spend Actuals	Historical Spend Plan	Historical Spend Variance	Recommended Marketing Spend	Marketing Spend Adjustment	Final Marketing Spend
Total Marketing Spend	\$1,356,923	\$1,297,317	\$(99,606)	\$1,356,923		\$1,356,923
Circulars	\$56,923	\$102,317	\$5,394			
Advertising - TV	\$129,231	\$102,317	\$(26,914)			
Advertising - Radio	\$84,615	\$76,738	\$12,122			
Advertising - Print	\$193,846	\$157,411	\$(36,436)			
Direct Mail	\$129,231	\$127,896	\$(1,335)			
Customer Specific	\$129,231	\$153,475	\$24,245			
One-day Sales	\$258,462	\$204,634	\$(53,828)			
End-of-Season Sales	\$84,615	\$76,738	\$12,122			
Seasonal Sales	\$84,615	\$81,198	\$(13,457)			
Online	\$56,923	\$102,317	\$5,394			
Other	\$129,231	\$102,317	\$(26,914)			

	Historical Spend Actuals	Historical Spend Plan	Historical Spend Variance	Recommended Marketing Spend	Marketing Spend Adjustment	Final Marketing Spend
Total Marketing Spend	\$1,356,923	\$1,257,317	\$(99,606)	\$1,356,923	\$500,000	\$1,856,923
Circulars	\$86,903	\$102,317	\$5,394			
Advertising - TV	\$129,231	\$102,317	\$(26,914)			
Advertising - Radio	\$54,615	\$76,738	\$12,122			
Advertising - Print	\$193,846	\$157,411	\$(36,436)			
Direct Mail	\$129,231	\$127,936	\$(1,335)			
Customer Specific	\$129,231	\$153,475	\$24,245			
One-day Sales	\$258,462	\$204,634	\$(53,828)			
End-of-Season Sales	\$54,615	\$76,738	\$12,122			
Seasonal Sales	\$54,615	\$51,158	\$(13,457)			
Online	\$86,923	\$102,317	\$5,394			
Other	\$129,231	\$102,317	\$(26,914)			

Historical allocations are used to spread the Final Marketing Spend dollars to each promotion type by banner. Again, the user can make adjustments to that information, by dollar or percentage, to achieve the desired distribution of promotional dollars.

	Final Marketing Spend	Recommended Allocation %	Allocation % Adjustment	Final Allocation %	Adjustment	Final Promotion Spend	Spoken Spend Variance
Total Marketing Spend	\$1,856,923	100%	3%	103%		\$1,912,631	
Circulars		7%		7%		\$132,637	
Advertising - TV		18%	5%	15%		\$269,696	
Advertising - Radio		5%		3%		\$51,206	
Advertising - Print		14%		14%		\$265,275	
Direct Mail		10%		10%		\$176,850	
Customer Specific		10%		10%		\$176,850	
One-day Sales		19%		19%		\$353,700	
End-of-Season Sales		5%		5%		\$88,425	
Seasonal Sales		5%		5%		\$88,425	
Online		7%		7%		\$132,637	
Other		10%		10%		\$176,850	

A warning is provided if the allocated promotional dollars are higher or lower than the targeted Final Marketing Spend dollars.

	Allocation % Adjustment	Final Allocation %	Adjustment	Final Promotion Spend	Promotion Spend Variance	Warning
Total Marketing Spend	3%	103%		\$1,912,631	\$55,708	Final Spend greater than Total Spend
Circulars		7%		\$132,637		
Advertising - TV	5%	15%		\$269,696		
Advertising - Radio		3%		\$51,206		
Advertising - Print		14%		\$265,275		
Direct Mail		10%		\$176,850		
Customer Specific		10%		\$176,850		
One-day Sales		19%		\$353,700		
End-of-Season Sales		5%		\$88,425		
Seasonal Sales		5%		\$88,425		
Online		7%		\$132,637		
Other		10%		\$176,850		

RETAIL - Promotion Planning | Contributions | Total Marketing Spend - Cognos Planning - Contributor

Total Marketing Spend | Total Marketing Spend Summary | Weekly Assumptions

Corporate | Q1-07 | Total Marketing Spend

	Allocation % Adjustment	Final Allocation %	Adjustment	Final Promotion Spend	Promotion Spend Variance	Warning
Total Marketing Spend	3%	103%	\$156,000	\$1,856,631	\$1,293	Final Spend less than Total Spend
Circulars		7%		\$132,637		
Advertising - TV	5%	15%		\$269,696		
Advertising - Radio	(2)%	3%		\$51,286		
Advertising - Print		14%	\$156,000	\$209,275		
Direct Mail		10%		\$176,850		
Customer-Specific		10%		\$176,850		
One-day Sales		19%		\$353,700		
End-of-Season Sales		5%		\$88,425		
Seasonal Sales		5%		\$88,425		
Online		7%		\$132,637		
Other		10%		\$176,850		

Current owner: Danielle Coughlin

Adjustments can be made to eliminate the warning.

RETAIL - Promotion Planning | Contributions | Total Marketing Spend - Cognos Planning - Contributor

Total Marketing Spend | Total Marketing Spend Summary | Weekly Assumptions

Corporate | Q1-07 | Total Marketing Spend

	Recommended Allocation %	Allocation % Adjustment	Final Allocation %	Adjustment	Final Promotion Spend	Promotion Spend Variance	Warning
Total Marketing Spend	100%	3%	103%	(\$5,700)	\$1,856,923		
Circulars	7%		7%		\$132,637		
Advertising - TV	10%		15%		\$269,696		
Advertising - Radio	5%	(2)%	3%		\$51,286		
Advertising - Print	14%		14%	(\$5,700)	\$209,567		
Direct Mail	10%		10%		\$176,850		
Customer-Specific	10%		10%		\$176,850		
One-day Sales	19%		19%		\$353,700		
End-of-Season Sales	5%		5%		\$88,425		
Seasonal Sales	5%		5%		\$88,425		
Online	7%		7%		\$132,637		
Other	10%		10%		\$176,850		

Current owner: Danielle Coughlin

The information from the Total Marketing Spend tab is linked into the Total Marketing Spend Summary tab, which includes five dimensions: Marketing and Vendor Hierarchy, Promotion Types, Banners, Quarters, and Total Marketing Spend Summary. This tab is used for reporting and for linking data to the lower level of campaign planning in the hierarchy. It is read-only to users, as indicated by the gray background of the cells.

RETAIL - Promotion Planning | Contributions | Total Marketing Spend - Cognos Planning - Contributor

Total Marketing Spend | Total Marketing Spend Summary | Weekly Assumptions

All Banners | Total Marketing Spend

		Q4-07	2007	Q1-08	Q2-08	Q3-08	Q4-08	2008			
Historical Spend Actuals	Circulars	,264	20,197,479	58,170,242	12,048,113	11,044,103	15,562,146	20,582,193	59,236,554		
Historical Spend Plan	Advertising - TV	,036	18,792,048	53,508,080	10,565,861	10,532,496	14,362,494	19,149,992	54,610,843		
Historical Spend Variance	Advertising - Radio	2,281	(1,485,430)	(4,580,163)	(1,482,252)	(511,608)	(1,195,651)	(1,432,200)	(4,625,712)		
Current Year Spend Plan	Advertising - Print	,724	20,483,858	59,324,248	12,273,408	11,259,682	15,850,337	21,014,106	60,397,532		
Current Year Spend Actuals	Direct Mail	0	0	14,824,305	0	0	0	0	0		
Current Year Spend Variance		4,466,033	4,010,248	15,539,724	20,483,858	44,499,864	12,273,408	11,259,682	15,850,337	21,014,106	60,397,532

Current owner: Danielle Coughlin

A third tab, called **Weekly Assumptions**, is a read-only assumptions tab provided to all *Blueprint* users. It includes valuable information for retailers, including the start- and end-date of each week, the period and quarter, whether the week is actual or forecast, and whether a holiday falls in that week. This information is used in the reporting and analysis portion of the *Blueprint* for promotional calendaring and year-over-year comparisons, not only by week, but by promotional holidays.

The **Weekly Assumptions** tab is made up of three dimensions: Weekly Assumptions, Weeks, and Years. It is a global assumptions tab, applicable to all levels of the hierarchy and is read-only to users.

Week	First Day of Week	Last Day of Week	Days in Week	Period	Quarter	Actuals/Forecast Flag	Attributes	Second Day of Week	Third Day of Week
Week 01	02-05-2007	02-11-2007	7 days	Period 1	Q1-07	Actuals		02-06-2007	02-07-2007
Week 02	02-12-2007	02-18-2007	7 days	Period 1	Q1-07	Actuals	Valentine's Day	02-13-2007	02-14-2007
Week 03	02-19-2007	02-25-2007	7 days	Period 1	Q1-07	Actuals		02-20-2007	02-21-2007
Week 04	02-26-2007	03-04-2007	7 days	Period 1	Q1-07	Actuals		02-27-2007	02-28-2007
Week 05	03-05-2007	03-11-2007	7 days	Period 1	Q1-07	Actuals		03-06-2007	03-07-2007
Week 06	03-12-2007	03-18-2007	7 days	Period 2	Q1-07	Actuals		03-13-2007	03-14-2007
Week 07	03-19-2007	03-25-2007	7 days	Period 2	Q1-07	Actuals	Spring	03-20-2007	03-21-2007
Week 08	03-26-2007	04-01-2007	7 days	Period 2	Q1-07	Actuals	Easter	03-27-2007	03-28-2007
Week 09	04-02-2007	04-08-2007	7 days	Period 2	Q1-07	Actuals	Easter	04-03-2007	04-04-2007
Week 10	04-09-2007	04-15-2007	7 days	Period 3	Q1-07	Actuals	Spring	04-10-2007	04-11-2007
Week 11	04-16-2007	04-22-2007	7 days	Period 3	Q1-07	Actuals	Spring	04-17-2007	04-18-2007
Week 12	04-23-2007	04-29-2007	7 days	Period 3	Q1-07	Actuals	Spring	04-24-2007	04-25-2007
Week 13	04-30-2007	05-06-2007	7 days	Period 3	Q1-07	Actuals		05-01-2007	05-02-2007
Week 14	05-07-2006	05-13-2006	7 days	Period 4	Q2-07	Actuals		05-08-2006	05-09-2006
Week 15	05-14-2007	05-20-2007	7 days	Period 4	Q2-07	Actuals		05-15-2007	05-16-2007
Week 16	05-21-2007	05-27-2007	7 days	Period 4	Q2-07	Actuals		05-22-2007	05-23-2007
Week 17	05-28-2007	06-03-2007	7 days	Period 4	Q2-07	Actuals		05-29-2007	05-30-2007
Week 18	06-04-2007	06-10-2007	7 days	Period 4	Q2-07	Actuals		06-05-2007	06-06-2007
Week 19	06-11-2007	06-17-2007	7 days	Period 5	Q2-07	Actuals		06-12-2007	06-13-2007
Week 20	06-18-2007	06-24-2007	7 days	Period 5	Q2-07	Actuals	Summer	06-19-2007	06-20-2007
Week 21	06-25-2007	07-01-2007	7 days	Period 5	Q2-07	Actuals	Summer	06-26-2007	06-27-2007
Week 22	07-02-2007	07-08-2007	7 days	Period 5	Q2-07	Actuals	4th of July	07-03-2007	07-04-2007
Week 23	07-09-2007	07-15-2007	7 days	Period 6	Q2-07	Actuals	Summer	07-10-2007	07-11-2007
Week 24	07-16-2007	07-22-2007	7 days	Period 6	Q2-07	Actuals	Summer	07-17-2007	07-18-2007
Week 25	07-23-2007	07-29-2007	7 days	Period 6	Q2-07	Actuals	Summer	07-24-2007	07-25-2007
Week 26	07-30-2007	08-05-2007	7 days	Period 6	Q2-07	Actuals	Summer	07-31-2007	08-01-2007
Week 27	08-06-2007	08-12-2007	7 days	Period 7	Q3-07	Forecast	Back to School	08-07-2007	08-08-2007
Week 28	08-13-2007	08-19-2007	7 days	Period 7	Q3-07	Forecast	Back to School	08-14-2007	08-15-2007
Week 29	08-20-2007	08-26-2007	7 days	Period 7	Q3-07	Forecast	Back to School	08-21-2007	08-22-2007
Week 30	08-27-2007	09-02-2007	7 days	Period 7	Q3-07	Forecast	Back to School	08-28-2007	08-29-2007
Week 31	09-03-2007	09-09-2007	7 days	Period 7	Q3-07	Forecast		09-04-2007	09-05-2007
Week 32	09-10-2007	09-16-2007	7 days	Period 8	Q3-07	Forecast		09-11-2007	09-12-2007
Week 33	09-17-2007	09-23-2007	7 days	Period 8	Q3-07	Forecast	Fal	09-18-2007	09-19-2007
Week 34	09-24-2007	09-30-2007	7 days	Period 8	Q3-07	Forecast	Fal	09-25-2007	09-26-2007
Week 35	10-01-2007	10-07-2007	7 days	Period 8	Q3-07	Forecast	Fal	10-02-2007	10-03-2007

Marketing Promotions

Once the top-down marketing targets are set, the results are linked to the campaign planning levels of the hierarchy where the details are planned, using the historical promotions analysis performed earlier.

The screenshot shows a web browser window titled 'RETAIL - Promotion Planning - Microsoft Internet Explorer'. The address bar shows 'http://localhost/cognos/contributor/planning02.asp?AppId=350406'. The page content includes a navigation menu on the left with categories like 'Contributions', 'Reviews', and 'Marketing Promotions'. The main area displays a table of promotions with columns for Name, State, Ownership, Reviewer, and Last Data Change. The 'Circulars' promotion is highlighted with a blue circle. Below the table, there is a section for 'Workflow information for Circulars'.

Name	State	Ownership	Reviewer	Last Data Change
Corporate Promotions (All)				
Circulars	Work In Progress	Danielle Coughlin		7:04:40 AM - Tuesday, March 06, 2007
Adverts	Locked	Danielle Coughlin		7:03:26 AM - Tuesday, March 06, 2007
Advertising - Radio	Not Started	Danielle Coughlin		7:03:06 AM - Tuesday, March 06, 2007
Advertising - Print	Not Started	None		7:01:54 AM - Tuesday, March 06, 2007
Direct Mail	Not Started	None		7:01:34 AM - Tuesday, March 06, 2007
Customer-Specific	Not Started	None		7:00:24 AM - Tuesday, March 06, 2007
Special Events	Not Started	None		7:00:03 AM - Tuesday, March 06, 2007
Online	Not Started	None		6:57:21 AM - Tuesday, March 06, 2007
Other	Not Started	None		6:56:59 AM - Tuesday, March 06, 2007

Workflow information for Circulars:
Current state: Work In Progress.
The &List item has been edited and saved but not submitted. [More...](#)
Time of last state change: 10:38:07 AM - Tuesday, August 01, 2006

Opening the Circulars item within the Corporate division of the hierarchy reveals seven tabs. The first tab is **Weekly Assumptions**, the global assumptions tab shown in the previous section. The majority of the planning owned by the promotion or marketing manager is performed in the second tab, called **Campaign Definition**. This tab is comprised of five dimensions: Marketing and Vendor Hierarchy, Campaign Definition, Placeholder, and New Repeat.

Repeat Promotion ID	Promotion Title	Historical Promotion ID	Historical Geography	Historical Department	Historical Start Date	Historical Duration	Budget Promo
New Promotions	Mens Sport Coats Sale	Historical Promotion 021	Southeast	Sportswear	09-27-2004	7 days	
Repeat Promotion 02	Home S/M for You	Historical Promotion 144	Northeast	Home Furnishings	12-13-2004	7 days	
Repeat Promotion 03	Collars are Great	Historical Promotion 134	All Geographies	Grocery	04-19-2006	7 days	
Repeat Promotion 04	Drug Promo 05	Historical Promotion 006	All Geographies	Pharmacy	05-06-2004	7 days	
Repeat Promotion 05	Kids Clothes 5	Historical Promotion 009	Northeast	Childrens Apparel	09-20-2004	7 days	
Repeat Promotion 06	Del's Slices 5	Historical Promotion 284	Southeast	Deli	02-25-2006	7 days	
Repeat Promotion 07	Headlights Make Sense	Historical Promotion 068	All Geographies	Auto Alternat	07-21-2002	7 days	
Repeat Promotion 08	Womens Clothes 5	Historical Promotion 167	Southeast	Womens Apparel	11-29-2004	7 days	
Repeat Promotion 09	Womens Clothes 9	Historical Promotion 219	Northeast	Womens Apparel	11-10-2003	7 days	
Repeat Promotion 10	Womens Suits for Sale	Historical Promotion 054	Midwest	Womens Apparel	04-13-2005	7 days	
Repeat Promotion 11	Baby Shoes 5	Historical Promotion 194	West	Footwear	12-17-2004	7 days	
Repeat Promotion 12	Drive Thru Days 7	Historical Promotion 159	All Geographies	Pharmacy	12-24-2004	7 days	
Repeat Promotion 13	Small Hats and Gloves	Historical Promotion 240	Northeast	Childrens Apparel	01-07-2006	7 days	
Repeat Promotion 14	New Bar Steaks for the House	Historical Promotion 152	Southeast	Home Furnishings	03-20-2006	7 days	
Repeat Promotion 15	Very Small Clothes	Historical Promotion 050	Midwest	Childrens Apparel	07-02-2002	7 days	
Repeat Promotion 16	Senior Discount Days 5	Historical Promotion 210	East	Household Products	08-09-2003	7 days	
Repeat Promotion 17	Shoes for the Child	Historical Promotion 129	East	Childrens Apparel	02-07-2005	7 days	
Repeat Promotion 18	Pet Food Blow Out	Historical Promotion 018	Southeast	Pets	06-11-2004	7 days	
Repeat Promotion 19	Roasted Meat Sale	Historical Promotion 081	Midwest	Deli	06-07-2005	7 days	
Repeat Promotion 20	Clean it Up!	Historical Promotion 173	East	Household Products	09-30-2002	7 days	
Repeat Promotion 21	Electronics Days 5	Historical Promotion 111	Northeast	Electronics	07-14-2006	7 days	
Repeat Promotion 22	Cosmetics Days 6	Historical Promotion 234	Midwest	Cosmetics/Fragrances	01-26-2005	7 days	
Repeat Promotion 23	Electronics Days 15	Historical Promotion 111	Northeast	Electronics	07-14-2006	7 days	
Repeat Promotion 24	Pharmacy Days 5	Historical Promotion 143	East	Pharmacy	06-02-2004	7 days	
Repeat Promotion 25	Decorate It 5	Historical Promotion 158	All Geographies	Home Decor	08-21-2004	7 days	
Repeat Promotion 26	Deli Pig Out 4	Historical Promotion 180	East	Deli	06-23-2006	7 days	
Repeat Promotion 27	Deli Pig Out 6	Historical Promotion 133	West	Deli	07-24-2003	7 days	
Repeat Promotion 28	Fragrance Smell a Thon	Historical Promotion 151	West	Cosmetics/Fragrances	01-14-2004	7 days	
Repeat Promotion 29	Seasonal Sale 8	Historical Promotion 170	West	Seasonal	05-17-2002	7 days	
Repeat Promotion 30	Leather Parts for Sale	Historical Promotion 211	Midwest	Leather Goods	10-15-2004	7 days	
Repeat Promotion 31	Seasonal Part 5	Historical Promotion 114	East	Seasonal	02-19-2006	7 days	
Repeat Promotion 32	Lamb Leather Jackets	Historical Promotion 255	East	Leather Goods	11-04-2002	7 days	
Repeat Promotion 33	Bats and Balls 4	Historical Promotion 033	Northeast	Sporting Goods	11-08-2005	7 days	
Repeat Promotion 34	Auto Batteries are Here	Historical Promotion 067	Midwest	Auto Alternat	06-30-2003	7 days	
Repeat Promotion 35	Kids Clothes for You!	Historical Promotion 038	Northeast	Childrens Apparel	11-26-2005	7 days	

Current owner: Danielle Coughlin

Users can determine which historical promotion will be repeated, a description for the promotion can be entered, and that historical promotion can be selected from a pick list. The associated historical information is then linked into the Campaign Definition tab from the Historical Promotions tab, described later in this section.

Repeat Promotion	Promotion Title	Historical Promotion ID	Historical Geography	Historical Department	Historical Start Date	Historical Duration	Al Budget Promo
Repeat Promotion 11	Baby Shoes 6	Historical Promotion 134	West	Footwear	12-17-2004	7 days	
Repeat Promotion 12	Drive Thru Days 7	Historical Promotion 159	All Geographies	Pharmacy	12-24-2004	7 days	
Repeat Promotion 13	Small Hats and Gloves	Historical Promotion 240	Northeast	Childrens Apparel	01-07-2005	7 days	
Repeat Promotion 14	New Bar Stools for the House	Historical Promotion 162	Southeast	Home Furnishings	03-20-2005	7 days	
Repeat Promotion 15	Very Small Clothes	Historical Promotion 050	Midwest	Childrens Apparel	07-02-2002	7 days	
Repeat Promotion 16	Senior Discount Days 5	Historical Promotion 210	East	Household Products	08-09-2003	7 days	
Repeat Promotion 17	Shoes for the Child	Historical Promotion 129	East	Childrens Apparel	02-07-2005	7 days	
Repeat Promotion 18	Pat Food Blow Out	Historical Promotion 016	Southeast	Pets	06-11-2004	7 days	
Repeat Promotion 19	Roasted Meat Sale	Historical Promotion 091	Midwest	Deli	06-07-2005	7 days	
Repeat Promotion 20	Clean it Up!	Historical Promotion 173	East	Household Products	09-30-2002	7 days	
Repeat Promotion 21	Electronics Days 5	Historical Promotion 111	Northeast	Electronics	07-14-2006	7 days	
Repeat Promotion 22	Cosmetics Days 6	Historical Promotion 234	Midwest	Cosmetics/Fragrances	01-26-2005	7 days	
Repeat Promotion 23	Electronics Days 15	Historical Promotion 111	Northeast	Electronics	07-14-2006	7 days	
Repeat Promotion 24	Pharmacy Days 5	Historical Promotion 143	East	Pharmacy	08-02-2004	7 days	
Repeat Promotion 25	Decorate It 5	Historical Promotion 168	All Geographies	Home Decor	08-21-2004	7 days	
Repeat Promotion 26	Deli Pig Out 4	Historical Promotion 180	East	Deli	08-23-2006	7 days	
Repeat Promotion 27	Deli Pig Out 6	Historical Promotion 133	West	Deli	07-24-2003	7 days	
Repeat Promotion 28	Fragrance Smells Like	Historical Promotion 151	West	Cosmetics/Fragrances	01-14-2004	7 days	
Repeat Promotion 29	Seasonal Sale 8	Historical Promotion 170	West	Seasonal	05-17-2002	7 days	
Repeat Promotion 30	Leather Pants for Sale	Historical Promotion 211	Midwest	Leather Goods	10-15-2004	7 days	
Repeat Promotion 31	Seasonal Part 5	Historical Promotion 114	East	Seasonal	02-18-2006	7 days	
Repeat Promotion 32	Lamb Leather Jackets	Historical Promotion 255	East	Leather Goods	11-04-2002	7 days	
Repeat Promotion 33	Bats and Balls 4	Historical Promotion 033	Northeast	Sporting Goods	11-09-2005	7 days	
Repeat Promotion 34	Auto Batteries are Here	Historical Promotion 067	Midwest	Auto Aftermarket	06-30-2003	7 days	
Repeat Promotion 35	Kids Clothes for You	Historical Promotion 038	Northeast	Childrens Apparel	11-26-2005	7 days	
Repeat Promotion 36	Electronics Sale						

Repeat Promotion	Historical Promotion ID	Historical Geography	Historical Department	Historical Start Date	Historical Duration	Historical Budget Promotion Costs	Actual Promot
Repeat Promotion 11	Historical Promotion 134	West	Footwear	12-17-2004	7 days	\$32,333	
Repeat Promotion 12	Historical Promotion 159	All Geographies	Pharmacy	12-24-2004	7 days	\$33,343	
Repeat Promotion 13	Historical Promotion 240	Northeast	Childrens Apparel	01-07-2005	7 days	\$6,260	
Repeat Promotion 14	Historical Promotion 162	Southeast	Home Furnishings	03-20-2005	7 days	\$5,230	
Repeat Promotion 15	Historical Promotion 050	Midwest	Childrens Apparel	07-02-2002	7 days	\$5,961	
Repeat Promotion 16	Historical Promotion 210	East	Household Products	08-09-2003	7 days	\$21,495	
Repeat Promotion 17	Historical Promotion 129	East	Childrens Apparel	02-07-2005	7 days	\$21,917	
Repeat Promotion 18	Historical Promotion 016	Southeast	Pets	06-11-2004	7 days	\$10,757	
Repeat Promotion 19	Historical Promotion 091	Midwest	Deli	06-07-2005	7 days	\$32,773	
Repeat Promotion 20	Historical Promotion 173	East	Household Products	09-30-2002	7 days	\$2,743	
Repeat Promotion 21	Historical Promotion 111	Northeast	Electronics	07-14-2006	7 days	\$42,039	
Repeat Promotion 22	Historical Promotion 234	Midwest	Cosmetics/Fragrances	01-26-2005	7 days	\$17,287	
Repeat Promotion 23	Historical Promotion 111	Northeast	Electronics	07-14-2006	7 days	\$42,039	
Repeat Promotion 24	Historical Promotion 143	East	Pharmacy	08-02-2004	7 days	\$24,333	
Repeat Promotion 25	Historical Promotion 168	All Geographies	Home Decor	08-21-2004	7 days	\$1,788	
Repeat Promotion 26	Historical Promotion 180	East	Deli	08-23-2006	7 days	\$12,713	
Repeat Promotion 27	Historical Promotion 133	West	Deli	07-24-2003	7 days	\$5,046	
Repeat Promotion 28	Historical Promotion 151	West	Cosmetics/Fragrances	01-14-2004	7 days	\$24,169	
Repeat Promotion 29	Historical Promotion 170	West	Seasonal	05-17-2002	7 days	\$24,260	
Repeat Promotion 30	Historical Promotion 211	Midwest	Leather Goods	10-15-2004	7 days	\$26,229	
Repeat Promotion 31	Historical Promotion 114	East	Seasonal	02-18-2006	7 days	\$14,665	
Repeat Promotion 32	Historical Promotion 255	East	Leather Goods	11-04-2002	7 days	\$11,686	
Repeat Promotion 33	Historical Promotion 033	Northeast	Sporting Goods	11-09-2005	7 days	\$9,279	
Repeat Promotion 34	Historical Promotion 067	Midwest	Auto Aftermarket	06-30-2003	7 days	\$15,550	
Repeat Promotion 35	Historical Promotion 038	Northeast	Childrens Apparel	11-26-2005	7 days	\$10,980	
Repeat Promotion 36	Historical Promotion 033	Southeast	Electronics	02-23-2003	7 days	\$9,371	

Users enter the additional promotional information for the repeat promotion being planned.

Repeat Promotions	Description	Status	Geography	Department	Start Date	End Date	Duration	Promotion Costs	is LI
Repeat Promotion 11	Repeat Baby Clothes	Proposed	Northeast	Electronics	02-18-2007	02-24-2007	7 days	\$11,000	
Repeat Promotion 12	Repeat Drive Thru Days	Proposed	West	Books and Music	03-12-2007	03-18-2007	7 days	\$4,500	
Repeat Promotion 13	Repeat Women's Scarves	Committed	West	Household Products	04-15-2007	04-21-2007	7 days	\$3,000	
Repeat Promotion 14	Repeat Toy Trains on the Track	Proposed	All Geographies	Cosmetics/Fragrances	06-26-2007	07-02-2007	7 days	\$7,500	
Repeat Promotion 15	Repeat Drive Thru Days	Proposed	East	Pharmacy	07-01-2007	07-07-2007	7 days	\$2,500	
Repeat Promotion 16	Repeat Drive Thru Days	Committed	West	Toys	09-27-2007	10-03-2007	7 days	\$5,000	
Repeat Promotion 17	Repeat Wash and Wax	Proposed	West	Home Furnishings	12-13-2007	12-19-2007	7 days	\$2,750	
Repeat Promotion 18	Repeat Eye Liner	Proposed	Northeast	Home Decor	12-13-2007	12-19-2007	7 days	\$1,200	
Repeat Promotion 19	Repeat Kids Shoes	Proposed	West	Auto/Altermarket	02-01-2007	02-07-2007	7 days	\$1,000	
Repeat Promotion 20	Repeat Allergy Days	Committed	Midwest	Books and Music	03-04-2007	03-10-2007	7 days	\$4,500	
Repeat Promotion 21	Repeat Electronics Days 5	Proposed	All Geographies	Electronics	07-11-2007	07-17-2007	7 days	\$4,430	
Repeat Promotion 22	Repeat Cosmetics Days 6	Committed	Midwest	Cosmetics/Fragrances	02-07-2007	02-13-2007	7 days	\$2,240	
Repeat Promotion 23	Repeat Electronics Days 15	Committed	Northeast	Electronics	07-11-2007	07-17-2007	7 days	\$4,450	
Repeat Promotion 24	Repeat Pharmacy Days 5	Committed	All Geographies	Pharmacy	07-30-2007	08-05-2007	7 days	\$1,524	
Repeat Promotion 25	Repeat Decorate It 5	Committed	Southeast	Home Decor	08-28-2007	09-03-2007	7 days	\$2,594	
Repeat Promotion 26	Repeat Del Pig Out 4	Proposed	West	Del	08-20-2007	09-16-2007	7 days	\$2,459	
Repeat Promotion 27	Repeat Del Pig Out 6	Committed	Southeast	Del	07-21-2007	07-27-2007	7 days	\$2,686	
Repeat Promotion 28	Repeat Fragrance Smell-a-Thon	Proposed	West	Cosmetics/Fragrances	03-11-2007	03-17-2007	7 days	\$9,742	
Repeat Promotion 29	Repeat Seasonal Sale 8	Proposed	Midwest	Seasonal	05-14-2007	05-20-2007	7 days	\$7,032	
Repeat Promotion 30	Repeat Leather Pants for Sale	Proposed	Northeast	Leather Goods	10-12-2007	10-18-2007	7 days	\$9,339	
Repeat Promotion 31	Repeat Seasonal Part 5	Committed	All Geographies	Seasonal	02-15-2007	02-21-2007	7 days	\$3,531	
Repeat Promotion 32	Repeat Lamb Leather Jackets	Proposed	West	Leather Goods	11-01-2007	11-07-2007	7 days	\$5,428	
Repeat Promotion 33	Repeat Bats and Balls 4	Proposed	Southeast	Sporting Goods	11-05-2007	11-11-2007	7 days	\$3,695	
Repeat Promotion 34	Repeat Auto Batteries are Here	Committed	Northeast	Auto/Altermarket	06-27-2007	07-03-2007	7 days	\$8,153	
Repeat Promotion 35	Repeat Kids Clothes for You!	Proposed	Northeast	Children's Apparel	11-23-2007	11-29-2007	7 days	\$4,321	
Repeat Promotion 36	Repeat Electronics Sale	Committed	Northeast	Electronics	12-01-2007	12-07-2007	7 days	\$5,000	10.00%

Repeat Promotions	Status	Geography	Department	Start Date	End Date	Duration	Promotion Costs	Sales Lift %	Sales Lift Amount
Repeat Promotion 11	Proposed	Northeast	Electronics	02-18-2007	02-24-2007	7 days	\$11,000	9.00%	
Repeat Promotion 12	Proposed	West	Books and Music	03-12-2007	03-18-2007	7 days	\$4,500	7.00%	
Repeat Promotion 13	Committed	West	Household Products	04-15-2007	04-21-2007	7 days	\$3,000	5.00%	
Repeat Promotion 14	Proposed	All Geographies	Cosmetics/Fragrances	06-26-2007	07-02-2007	7 days	\$7,500	3.00%	
Repeat Promotion 15	Proposed	East	Pharmacy	07-01-2007	07-07-2007	7 days	\$2,500	2.50%	
Repeat Promotion 16	Committed	West	Toys	09-27-2007	10-03-2007	7 days	\$5,000	5.00%	
Repeat Promotion 17	Proposed	West	Home Furnishings	12-13-2007	12-19-2007	7 days	\$2,750	4.65%	
Repeat Promotion 18	Proposed	Northeast	Home Decor	12-13-2007	12-19-2007	7 days	\$1,200	5.00%	
Repeat Promotion 19	Proposed	West	Auto/Altermarket	02-01-2007	02-07-2007	7 days	\$1,000	2.30%	
Repeat Promotion 20	Committed	Midwest	Books and Music	03-04-2007	03-10-2007	7 days	\$4,500	3.40%	
Repeat Promotion 21	Proposed	All Geographies	Electronics	07-11-2007	07-17-2007	7 days	\$4,430	10.00%	
Repeat Promotion 22	Committed	Midwest	Cosmetics/Fragrances	02-07-2007	02-13-2007	7 days	\$2,240	13.00%	
Repeat Promotion 23	Committed	Northeast	Electronics	07-11-2007	07-17-2007	7 days	\$4,450	10.00%	
Repeat Promotion 24	Committed	All Geographies	Pharmacy	07-30-2007	08-05-2007	7 days	\$1,524	3.00%	
Repeat Promotion 25	Committed	Southeast	Home Decor	08-28-2007	09-03-2007	7 days	\$2,594	6.00%	
Repeat Promotion 26	Proposed	West	Del	08-20-2007	09-16-2007	7 days	\$2,459	10.00%	
Repeat Promotion 27	Committed	Southeast	Del	07-21-2007	07-27-2007	7 days	\$2,686	5.00%	
Repeat Promotion 28	Proposed	West	Cosmetics/Fragrances	03-11-2007	03-17-2007	7 days	\$9,742	10.00%	
Repeat Promotion 29	Proposed	Midwest	Seasonal	05-14-2007	05-20-2007	7 days	\$7,032	10.00%	
Repeat Promotion 30	Proposed	Northeast	Leather Goods	10-12-2007	10-18-2007	7 days	\$9,339	7.00%	
Repeat Promotion 31	Committed	All Geographies	Seasonal	02-15-2007	02-21-2007	7 days	\$3,531	1.00%	
Repeat Promotion 32	Proposed	West	Leather Goods	11-01-2007	11-07-2007	7 days	\$5,428	8.00%	
Repeat Promotion 33	Proposed	Southeast	Sporting Goods	11-05-2007	11-11-2007	7 days	\$3,695	14.00%	
Repeat Promotion 34	Committed	Northeast	Auto/Altermarket	06-27-2007	07-03-2007	7 days	\$8,153	11.00%	
Repeat Promotion 35	Proposed	Northeast	Children's Apparel	11-23-2007	11-29-2007	7 days	\$4,321	10.00%	
Repeat Promotion 36	Committed	Northeast	Electronics	12-01-2007	12-07-2007	7 days	\$5,000	10.00%	

If there are no historical promotions that users will employ to forecast upcoming promotions, the view called New Promotions can be used. In this view, users simply enter the promotional information without using a historical promotion as basis.

Description	Status	Geography	Department	Start Date	End Date	Duration	Promotion Costs	Sales Lift %	Sales Lift Amount
New Promotion 01	New Auto Promotions	Committed	All Geographies	Auto Aftermarket	07-12-2007	07-18-2007	7 days	\$2,500	3.00%
New Promotion 02	Test Market	Committed	Southeast	Sporting Goods	05-28-2007	06-10-2007	14 days	\$3,150	2.70%
New Promotion 03	Mens Hats	Proposed	Midwest	Mens Apparel	05-15-2007	05-19-2007	5 days	\$2,100	1.50%
New Promotion 04									
New Promotion 05									
New Promotion 06									
New Promotion 07									
New Promotion 08									
New Promotion 09									
New Promotion 10									
Total New Promotions							\$7,750		

Once the promotion or marketing manager has completed the process of entering promotions, the appropriate information is linked into the tab called Campaign Details, where the costs of the promotion are broken into cost categories. The Campaign Details tab contains five dimensions: Marketing and Vendor Hierarchy, Campaign Detail Allocation, Campaign Details, New Repeat, and Placeholder.

Historical Allocation %	Promotion Costs	Adjustment %	Adjustment	Total Adjustment	Budgeted Cost	Advance/Delay in Weeks	Unit
19%	\$2,095				\$2,095		
17%	\$1,896				\$1,896		
19%	\$2,095				\$2,095		
5%	\$524				\$524		
3%	\$314				\$314		
14%	\$1,571				\$1,571		
10%	\$1,048				\$1,048		
13%	\$1,467				\$1,467		
100%	\$11,000				\$11,000		

Users can make adjustments to the breakdown of campaign costs, and will receive warnings if the adjustments are not in line with the promotion costs entered on the Campaign Definition tab.

	Historical Allocation %	Promotion Costs	Adjustment %	Adjustment	Total Adjustment	Budgeted Cost	Advance/(Delay) in Weeks	Warning
Creative	13%	\$1,282		\$500	\$500	\$1,782		
Production	16%	\$1,795		\$600	\$1,500	\$1,295		
Printing	5%	\$513				\$513		
Lists	12%	\$1,154				\$1,154		
Mailing	9%	\$897				\$897		
Labor	14%	\$1,410				\$1,410		
Fees	19%	\$1,923				\$1,923		
Other	10%	\$1,026				\$1,026		
Total Campaign	100%	\$10,000				\$10,000		

The campaign information is then linked into the **Weekly Summary**. This tab has six dimensions: Marketing and Vendor Hierarchy, Weekly Summary, Placeholder, New Repeat, Weeks, and Years. This tab provides a view of each promotion with the revenue and costs distributed appropriately into each week affected by the promotion. Users can also make sales lift adjustments in this tab if the expected lift is not distributed evenly over the life of the promotion.

	Week 41	Week 42	Week 43	Week 44	Week 45	Week 46	Week 47	Week 48	Week 49	Week 50	Week 51
Promotion Title			Electronics Sale	Electronics Sale							
Status			Committed	Committed							
Geography			Northeast	Northeast							
Department			Electronics	Electronics							
Start Date			12-01-2007	12-01-2007							
End Date			12-07-2007	12-07-2007							
Promotion Days in Period			2 days	5 days							
Promotion Days/Promotion Duration			28.57%	71.43%							
Creative			\$509	\$1,273							
Production			\$370	\$325							
Printing			\$147	\$366							
Lists			\$330	\$824							
Mailing			\$256	\$641							
Labor			\$403	\$1,007							
Fees			\$549	\$1,374							
Other			\$293	\$723							
Promotion Costs			\$2,857	\$7,143							
Cumulative Promotion Costs			\$2,857	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Base Sales Forecast			\$97,122	\$165,276							
Sales Lift %			10.00%	10.00%							
Base Sales Lift			\$9,712	\$16,528							
Sales Lift Amount											
Sales Lift Adjustment											
Sales Lift			\$9,712	\$16,528							
Cumulative Sales Lift			\$9,712	\$26,240	\$26,240	\$26,240	\$26,240	\$26,240	\$26,240	\$26,240	\$26,240
Promotion Margin			\$6,855	\$9,385							
Cumulative Promotion Margin			\$6,855	\$16,240	\$16,240	\$16,240	\$16,240	\$16,240	\$16,240	\$16,240	\$16,240
Promotion ROI			739.93%	131.39%							

The information from the **Weekly Summary** tab is linked into **Period Summary** using a 5, 5, 4 profile. Users can see the allocation of weeks to periods in the **Weekly Assumptions** tab, and that information is used in the link between the two tabs. The five dimensions in the **Period Summary** tab are: Marketing and Vendor Hierarchy, Period Summary, New Repeat, Periods, and Years.

	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	Full Year
Promotion Costs	\$36,484	\$17,482	\$4,200	\$10,990	\$20,153	\$27,780	\$19,587	\$5,000	\$12,441	\$20,342	\$3,950		\$178,407
Sales Lift	\$136,658	\$27,592	\$29,083	\$16,200	\$199,427	\$144,708	\$37,122	\$17,695	\$29,431	\$77,250	\$33,802		\$751,140
Promotion Margin	\$100,176	\$10,111	\$24,883	\$7,289	\$179,274	\$116,928	\$17,535	\$12,695	\$17,050	\$56,951	\$29,852		\$572,733
Promotion ROI	274.59%	57.84%	592.44%	66.33%	889.57%	420.91%	89.52%	253.70%	137.05%	279.96%	795.74%		321.03%

Finally, the promotions information is linked into the **Quarterly Promotion Costs** tab, which provides a quarterly summary of the promotions. This tab also contains the top-down targets set in the Total Marketing Spend section of the hierarchy, so that users can determine whether they are in compliance and how much marketing spend they have remaining in the year. Users will receive a warning if their planned campaign costs are over budget. The **Quarterly Promotion Costs** tab is comprised of three dimensions: Marketing and Vendor Hierarchy, Promotion Cost Summary, and Quarters.

	Q1-07	Q2-07	Q3-07	Q4-07	2007	Q1-08	Q2-08	Q3-08	Q4-08	2008
Prior Year Actual Promotion Costs	\$32,074	\$84,404	\$118,933	\$157,298	\$452,712	\$93,831	\$86,812	\$121,198	\$150,294	\$461,335
Budgeted Promotion Costs	\$132,637	\$88,846	\$125,192	\$165,577	\$512,253	\$98,769	\$90,538	\$127,577	\$168,731	\$485,615
YTD Budgeted Promotion Costs	\$132,637	\$221,484	\$346,676	\$512,253	\$512,253	\$98,769	\$189,308	\$316,885	\$485,615	\$485,615
Actual Promotion Costs										
Committed Promotion Costs	\$28,436	\$34,353	\$16,236	\$10,000	\$89,025					
Proposed Promotion Costs	\$29,728	\$32,320	\$20,792	\$14,292	\$97,132					
Total Promotion Costs	\$58,164	\$66,673	\$37,028	\$24,292	\$186,157					
YTD Promotion Costs	\$58,164	\$124,837	\$161,865	\$186,157	\$186,157					
Promotion Costs Variance to Budget	\$74,474	\$22,173	\$88,165	\$141,265	\$326,096	\$98,769	\$90,538	\$127,577	\$168,731	\$485,615
Available Promotion Dollars	\$74,474	\$96,647	\$184,811	\$326,096	\$326,096	\$98,769	\$189,308	\$316,885	\$485,615	\$485,615
Message										

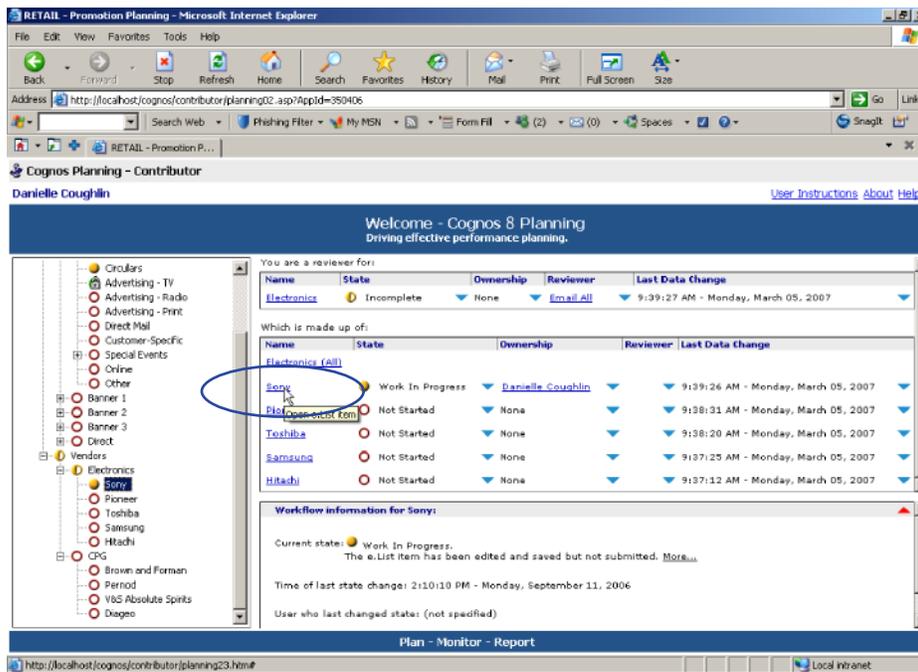
The details of the historical promotions are provided on the last tab called **Historical Promotions**, which contains three dimensions: Marketing and Vendor Hierarchy, Promotion Details Historic, and Historical Promotions. In addition to the analysis of historical promotions performed through the Retail Promotions Portal discussed at the beginning of this guide, users can access the historical promotion detail in this tab as they are planning future promotions.

	Description	Geography	Department	Start Date	Duration	Budget Promotion Costs	Actual Promotion Costs	Actual Costs Vari
Historical Promotion 001	Baby Shoe Specials	Midwest	Infants	05-16-2002	7 days	\$10,000	\$7,256	
Historical Promotion 002	Massages 3	West	Pharmacy	03-19-2004	7 days	\$5,000	\$13,686	
Historical Promotion 003	Silk Sale 1	East	Womens Apparel	07-24-2005	7 days	\$12,600	\$10,263	
Historical Promotion 004	Pick up your Toy!	Midwest	Toys	07-06-2003	7 days	\$11,800	\$27,026	
Historical Promotion 005	Paper Specials	West	Pharmacy	05-28-2003	7 days	\$3,500	\$23,510	
Historical Promotion 006	Drive Through Specials	All Geographies	Pharmacy	09-06-2004	7 days	\$11,724	\$10,336	
Historical Promotion 007	Electric Cars Supplies	Northeast	Auto Aftermarket	09-20-2003	7 days	\$12,780	\$12,712	
Historical Promotion 008	Hair Products	Northeast	Cosmetics/Fragrances	05-24-2006	7 days	\$11,196	\$10,720	
Historical Promotion 009	Childrens T-Shirts Specials 8	Northeast	Childrens Apparel	09-20-2004	7 days	\$11,478	\$18,536	
Historical Promotion 010	Childrens Shorts Specials	Southeast	Childrens Apparel	02-04-2004	7 days	\$3,200	\$10,588	
Historical Promotion 011	Pets Save Lives 4	Midwest	Pets	10-22-2004	7 days	\$11,400	\$12,053	
Historical Promotion 012	Toys for You 4	Northeast	Toys	11-17-2004	7 days	\$11,970	\$10,152	
Historical Promotion 013	Spring Clean Out	West	Home Furnishings	01-09-2003	7 days	\$5,985	\$5,082	
Historical Promotion 014	Shoe Design Specials Days	West	Footwear	08-11-2004	7 days	\$7,110	\$7,766	
Historical Promotion 015	DVD Sale 3	All Geographies	Electronics	10-05-2002	7 days	\$7,530	\$10,366	
Historical Promotion 016	Special Seasonal Days 3	Midwest	Seasonal	01-14-2005	7 days	\$8,746	\$11,324	
Historical Promotion 017	Book & Danc 1	Midwest	Books and Music	01-02-2006	7 days	\$6,650	\$19,108	
Historical Promotion 018	Night of the Iguana 3	Southeast	Pets	06-11-2004	7 days	\$10,757	\$12,446	
Historical Promotion 019	Childrens Special Days	Southeast	Childrens Apparel	06-14-2005	7 days	\$11,004	\$34,304	
Historical Promotion 020	Special Sportswear Days	West	Sportswear	06-17-2006	7 days	\$10,510	\$16,052	
Historical Promotion 021	Sportman Gallery	Southeast	Sportswear	09-27-2004	7 days	\$11,359	\$9,939	
Historical Promotion 022	Face the Music	All Geographies	Books and Music	06-02-2006	7 days	\$11,456	\$13,412	
Historical Promotion 023	Intimates Sale 6	Southeast	Womens Apparel	08-28-2002	7 days	\$11,696	\$21,119	
Historical Promotion 024	Childrens Pants Specials 6	East	Childrens Apparel	06-21-2004	7 days	\$8,309	\$11,135	
Historical Promotion 025	Pickled Days	West	Deli	04-16-2002	7 days	\$11,072	\$11,582	
Historical Promotion 026	Meal Plates 5	Northeast	Deli	08-10-2006	7 days	\$10,300	\$9,402	
Historical Promotion 027	Childrens Shorts Specials	West	Childrens Apparel	04-15-2006	7 days	\$10,041	\$7,562	
Historical Promotion 028	Candle Blown Out 21	West	Home Decor	05-12-2003	7 days	\$9,845	\$15,949	
Historical Promotion 029	Mens Shoe Bonanza	West	Mens Apparel	10-20-2004	7 days	\$9,618	\$19,948	
Historical Promotion 030	Melle Nonsen Days	East	Cosmetics/Fragrances	02-20-2002	7 days	\$9,505	\$7,482	
Historical Promotion 031	Pull the Magic Party	West	Bakery	03-15-2005	7 days	\$9,412	\$10,732	
Historical Promotion 032	Winter Electronics Days	Southeast	Electronics	02-23-2003	7 days	\$9,371	\$9,983	
Historical Promotion 033	Football Days	Northeast	Sporting Goods	11-08-2005	7 days	\$9,278	\$8,522	
Historical Promotion 034	Cosmetics Special Days	Southeast	Cosmetics/Fragrances	09-19-2003	7 days	\$9,175	\$10,012	
Historical Promotion 035	Dylan New Release	Southeast	Books and Music	02-22-2003	7 days	\$9,072	\$7,226	

Current owner: Danielle Coughlin

Vendor Promotions

Another feature of the *Blueprint* is the promotion planning vendor section, used to manage and track promotions conducted in partnership with vendors.



Clicking the link for Sony provides a view of the nine tabs used to plan vendor promotions. The **Weekly Assumptions** tab is the same tab seen in the previous previous views, which contain global assumptions. The second tab is called **Vendor Deal** and is structured much like the **Campaign Definition** tab in the Marketing Promotions view. This tab contains four dimensions: Marketing and Vendor Hierarchy, Vendor Fund Details, Placeholder, and New Repeat. Users can choose a repeat promotion based on analysis performed on the Retail Promotions Portal, or define a new campaign.

Repeat Promotion	New Promotion Title	Historical Promotion ID	Historical Promotion Type	Historical Geography	Historical Department	Historical Start Date	Historical End Date
Repeat Promotion 01	Sony Co-op Advertising 1	Historical Promotion 010	Co-op Advertising	Northeast	Electronics	05-04-2005	
Repeat Promotion 02	Sony Other Promo 1	Historical Promotion 215	Other	Midwest	Electronics	04-29-2004	
Repeat Promotion 03	Sony Sampling 2	Historical Promotion 213	Sampling	All Geographies	Electronics	12-10-2004	
Repeat Promotion 04	Sony Coupons Program 3	Historical Promotion 142	Coupons	East	Electronics	06-15-2006	
Repeat Promotion 05	Sony Rebates 1	Historical Promotion 143	Rebates	Southwest	Electronics	08-19-2002	
Repeat Promotion 06	Sony Other Promo 2	Historical Promotion 026	Other	All Geographies	Electronics	01-22-2003	
Repeat Promotion 07	Sony Rebates 3	Historical Promotion 211	Rebates	West	Electronics	03-15-2004	
Repeat Promotion 08	Sony Merchandise Allowance 1	Historical Promotion 089	Merchandise Allowance	West	Electronics	10-15-2004	
Repeat Promotion 09	Sony Merchandise Allowance 2	Historical Promotion 224	Merchandise Allowance	All Geographies	Electronics	03-28-2006	
Repeat Promotion 10	Sony Rebates 2	Historical Promotion 019	Rebates	Southwest	Electronics	11-23-2003	
Repeat Promotion 11	Sony Rebates 4	Historical Promotion 011	Rebates	East	Electronics	12-04-2004	

Repeat Promotion	Description	Promotion Type	Status	Geography	Department	Start Date	End Date	Duration	Vendor Funds
Repeat Promotion 01	Sony Co-op Advertising 1	Co-op Advertising	Committed	Southeast	Electronics	02-21-2007	02-21-2007	1 days	\$5,000
Repeat Promotion 02	Sony Other Promo 1	Other	Proposed	Midwest	Electronics	09-18-2007	09-18-2007	24 days	\$15,000
Repeat Promotion 03	Sony Sampling 2	Sampling	Committed	All Geographies	Electronics	05-15-2007	07-02-2007	18 days	\$14,000
Repeat Promotion 04	Sony Coupons Program 3	Coupons	Proposed	West	Electronics	08-06-2008	08-28-2008	15 days	\$4,000
Repeat Promotion 05	Sony Rebates 1	Rebates	Committed	Midwest	Electronics	06-25-2008	07-21-2008	27 days	\$3,000
Repeat Promotion 06	Sony Other Promo 2	Other	Committed	All Geographies	Electronics	01-04-2008	01-26-2008	23 days	\$17,000
Repeat Promotion 07	Sony Rebates 3	Rebates	Proposed	East	Electronics	11-15-2007	11-16-2007	2 days	\$9,000
Repeat Promotion 08	Sony Merchandise Allowance 1	Merchandise Allowance	Committed	Midwest	Electronics	07-20-2007	08-13-2007	25 days	\$18,000
Repeat Promotion 09	Sony Merchandise Allowance 2	Merchandise Allowance	Committed	All Geographies	Electronics	04-21-2007	05-08-2007	18 days	\$20,000
Repeat Promotion 10	Sony Rebates 2	Rebates	Proposed	Northeast	Electronics	05-05-2007	05-04-2007	30 days	\$7,000
Repeat Promotion 11	Sony Rebates 4	Rebates	Committed	East	Electronics	12-04-2007	01-12-2008	40 days	\$13,000

Once promotion details are entered in the **Vendor Deal** tab, the information is linked to the **Vendor Deal Weekly Summary** tab and spread over the appropriate weeks applicable to the promotion. The **Vendor Deal Weekly Summary** tab has six dimensions: Marketing and Vendor Hierarchy, Vendor Deal Weekly Summary, Placeholder, New Repeat, Weeks, and Years.

	Week 43	Week 44	Week 45	Week 46	Week 47	Week 48	Week 49	Week 50
Promotion Title	Sony Rebates 4							
Promotion Type	Rebates							
Status	Committed							
Geography	East							
Department	Electronics							
Start Date	12-04-2007	12-04-2007	12-04-2007	12-04-2007	12-04-2007	12-04-2007	12-04-2007	12-04-2007
End Date	01-12-2008	01-12-2008	01-12-2008	01-12-2008	01-12-2008	01-12-2008	01-12-2008	01-12-2008
Promotion Days in Period	6 days	7 days	7 days	7 days	7 days	7 days	6 days	
Promotion Days/Promotion Duration	15.00%	17.50%	17.50%	17.50%	17.50%	17.50%	15.00%	
Vendor Funds in Period	\$1,950	\$2,275	\$2,275	\$2,275	\$2,275	\$2,275	\$1,950	
Base Sales Forecast	\$73,886	\$49,415	\$151,475	\$140,315	\$236,010	\$150,445		
Sales Lift %	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%		
Base Sales Lift	\$23,794	\$4,942	\$15,148	\$14,032	\$23,601	\$15,045		
Sales Lift Amount		\$23,794	\$4,942	\$15,148	\$14,032	\$23,601	\$15,045	
Sales Lift Adjustment								
Sales Lift		\$23,794	\$4,942	\$15,148	\$14,032	\$23,601	\$15,045	
Cumulative Sales Lift		\$23,794	\$28,735	\$43,883	\$57,914	\$81,515	\$96,560	\$96,560

The weekly information is summarized into a periodic view in the **Vendor Deal Period Summary** tab, which also includes a count of the number of vendor deals per period and includes five dimensions: Marketing and Vendor Hierarchy, Vendor Deal Period Summary, New Repeat, Periods, and Years.

	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	Full Year
Vendor Funds in Period	\$18,011	\$5,133	\$14,000	\$12,240	\$20,135	\$625	\$9,350	\$11,317	\$16,733		\$113,144
Sales Lift	\$73,886	\$107,529	\$146,591	\$46,553	\$63,059	\$95	\$25,308	\$157,359	\$421,473		\$1,052,456
Sales Lift as % of Vendor Funds	409.12%	2,094.73%	1,047.00%	380.34%	342.98%	159.22%	260.39%	1,395.72%	2,518.87%		930.19%
Vendor Deal Count	2	1	1	1	2	1	2	2	2		15

The **Vendor Deal Type Summary** tab provides a breakdown of of vendor deals by type, and includes information about vendor funds versus sales lift for both committed and proposed promotions. This tab contains six dimensions: Vendor Deal Summary, Marketing and Vendor Hierarchy, Vendor Deal Types, Promo Status with Totals, Periods, and Years.

Committed	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12
Proposed Vendor Funds			\$17,778			\$12,240	\$5,760					
All Promotions Sales Lift			\$66,354			\$46,553	\$32,122					
Slotting Fees												
Co-op Advertising	\$5,000											
Rebates									\$1,950	\$9,100	\$1,950	
Market Development Funds									\$23,794	\$57,722	\$15,04	
Volume Incentives					\$567							
Coupons					\$18,522							
Sampling						\$14,000	\$6,756					
Other					\$146,561		\$8,596				\$2,217	\$14,78
All Promotion Types	\$5,000	\$17,778	\$14,567	\$12,240	\$12,516	\$1,950	\$11,317	\$16,733	\$23,794	\$157,959	\$421,47	

Current owner: Danielle Coughlin

The **Vendor Performance Summary** tab provides details about promotional impact for this vendor, broken down by deal type, and includes five dimensions: Marketing and Vendor Hierarchy, Vendor Performance Summary, Versions, Periods, and Years.

Committed	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9	Period 10	Period 11	Period 12	All Yr
Sales Lift	\$67,208	\$10,636	\$670,378		\$1,745,808	\$560,082	\$392,768	\$22,487	\$25,258	\$62,627	\$313,106	\$4,504,513	\$8
Projected Sales Lift	\$67,208	\$10,636	\$670,378		\$1,745,808	\$560,082	\$392,768	\$22,487	\$25,258	\$62,627	\$313,106	\$4,504,513	\$8
Merchandise Allowance			\$17,778			\$12,240	\$5,760						
Slotting Fees													
Co-op Advertising	\$5,000												
Rebates									\$1,950	\$9,100	\$1,950		
Market Development Funds													
Volume Incentives					\$567								
Coupons					\$18,522								
Sampling						\$14,000	\$6,756						
Other											\$2,217	\$14,783	
Total Promotions	\$5,000	\$17,778	\$14,567	\$12,240	\$12,516	\$1,950	\$11,317	\$16,733	\$23,794	\$157,959	\$421,47		
Promotional Impact	\$62,208	\$10,636	\$653,208		\$1,731,241	\$547,842	\$380,252	\$22,487	\$25,258	\$60,677	\$901,869	\$4,487,787	\$8

Current owner: Danielle Coughlin

The **Vendor Compliance** tab is used to manage the vendor’s compliance with agreed-upon vendor funds and payment dates, and is comprised of three dimensions: Marketing and Vendor Hierarchy, Vendor Compliance, and Placeholder. Warnings are provided if the vendor is out of compliance; and that information can be used to determine the validity of future promotions with this vendor.

Repeat Promotion	Vendor Funds Compliance?	Completed?	Warning	Comments
Repeat Promotion 01	Yes	Yes		
Repeat Promotion 02	No	No	Explanation of non-compliance required	
Repeat Promotion 03	No	Yes	Explanation of non-compliance required	Funds will be added to like promotion in the future.
Repeat Promotion 04	No	No	Explanation of non-compliance required	
Repeat Promotion 05	No	No	Explanation of non-compliance required	
Repeat Promotion 06	No	No	Explanation of non-compliance required	
Repeat Promotion 07	Yes	Yes	Explanation of non-compliance required	
Repeat Promotion 08	No	No	Explanation of non-compliance required	
Repeat Promotion 09	No	Yes	Explanation of non-compliance required	
Repeat Promotion 10	Yes	Yes		
Repeat Promotion 11	No	No	Explanation of non-compliance required	
Repeat Promotion 12				
Repeat Promotion 13				
Repeat Promotion 14				
Repeat Promotion 15				
Repeat Promotion 16				
Repeat Promotion 17				
Repeat Promotion 18				
Repeat Promotion 19				
Repeat Promotion 20				
Repeat Promotion 21				
Repeat Promotion 22				
Repeat Promotion 23				
Repeat Promotion 24				
Repeat Promotion 25				
Repeat Promotion 26				
Repeat Promotion 27				
Repeat Promotion 28				
Repeat Promotion 29				
Repeat Promotion 30				
Repeat Promotion 31				
Repeat Promotion 32				
Repeat Promotion 33				
Repeat Promotion 34				
Repeat Promotion 35				

The **Vendor Assumptions** tab provides users with information about the vendor used in the **Vendor Compliance** tab and contains two dimensions: Marketing and Vendor Hierarchy and Vendor Assumptions.

Vendor Status	Category Captain	Payment Terms
Sony	Compliant	Yes 30 days

Finally, the **Historical Promotions** tab is structured like the one shown in the Marketing Promotions view, and contains the information that can be analyzed for potential repeat promotions. It is linked to the **Vendor Deal** tab when users create a repeat promotion for this vendor.

In summary, this *Blueprint* is designed to help chains optimize the effectiveness and return for both retailer- and vendor-funded promotional activities. Cognos retail solutions are designed to integrate all operational silos—including operations, marketing, merchandising and finance—to ensure that all parts of the organization are planning to a single set of financial goals and business objectives.

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The Cognos Innovation Center was established in North America, Europe, and Asia-Pacific to advance the understanding of proven planning and performance management techniques, technologies, and practices. The Innovation Center is dedicated to transforming routine performance management practices into “next practices” that help cut costs, streamline processes, boost productivity, enable rapid response to opportunity, and increase management visibility.

Staffed globally by experts in performance management, planning, business intelligence, financial consolidation, strategy management, and technology, the Innovation Center partners with more than 2000 Cognos customers, academics, industry leaders, and others seeking to accelerate adoption, reduce risk, and maximize the impact of technology-enabled performance management practices.