



Promotion Optimization Institute, LLC

2023 Vendor Panorama for Consumer Goods Retail Sales Execution Capability & Solution Advancements



TELUS[®]

Consumer Goods

TELUS Consumer Goods

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Profile: TELUS acquired AFS Exceedra in November 2020 with the ambition to create a better flow of information across the entire food value chain and become a complete RGM Partner for Retail and Foodservice. The TELUS Consumer Goods suite of tools is designed to help CPG companies optimize the impact of their trade promotion spend, retail execution, and supply chain management. This research will cover the Retail Execution Enterprise (REE) and POP6 solutions.

Geographic Presence: North America (45%), Latin America (12%), Europe (23%), Asia/Pacific (20%), Middle East (<1%).

Total Consumer Goods Users (seats): 243,000.

Tiers Represented: All.

Solution Offerings: Retail Sales, Retail Merchandising, DSD, Van Sales, Distributor Management (DMS).

Industries: All major CPG industries.

Configuration/Customization: TELUS Consumer Goods solutions are highly configurable and extensible in the standard offering and feature integration capabilities to publish and subscribe to data from virtually any source. Customer-specific customizations are not currently supported, but TELUS will absorb most customer-requested development as part of the standard solution where required.

Technology Architecture/Delivery Options: The solutions are delivered as multi-tenant SaaS.

Service Partners: Accenture, Infosys, Systems Group (Russia), Logicode (Romania), Pivotal Polska (Poland), Senior Software (Romania), MD Profy (Serbia), IQ (Hungary), ScanMex (Mexico), KronIT (Mexico), IDETKA (Colombia), AlixPartners (NA).

Technology Partners: Key technology partners include Microsoft, Google, Rackspace, Honeywell, and Zebra. TELUS has a significant strategic relationship with Google.

User Experience:

Field Users: Field users enjoy a simplified, guided approach to help execute assigned tasks using either the TELUS Retail Execution Enterprise solution (REE) for sales, merchandising, and DSD or POP6, which is designed for sales and merchandising functions for Tier 2/3 customers or for Tier 1 that prefer a full SaaS approach with an accelerated implementation approach and no customizations. Both solutions feature interconnected master data and analytics and provide an excellent user experience. The REE mobile solution has an intuitive look and feel and is easy to navigate. Field users leverage Rapid Image Recognition capabilities to provide analytics on planogram compliance and share of shelf while also generating task activities for current and future visits. Embedded machine learning continually improves accuracy and also provides an estimated accuracy report. Rapid Image Recognition was recently enhanced to immediately stitch together multiple photos in real-time on the mobile device. A new area of functionality is the Sales Recommendation Engine, named Emerald, which leverages AI/ML to generate sales/product recommendations based on any number of criteria to generate higher sales and volume. It highlights prioritized opportunity areas for field sellers when planning their visits, during visit execution, and while taking orders. An example is highlighting the impact of replacing a slow mover with an undersold product — helping the store manager understand the overall impact on their sales.

Field rep dashboards provide the current status to corporate set KPIs. Contests can be set up to further drive engagement and adoption. REE enables clients to prioritize activity items based on how much value they represent to the business, helping reps understand what to get done first and score the most gamification points in the process. TELUS has recently extended these gamification features to the broader organization by providing visibility of in-game live dashboards and score results to engage the enterprise.

REE is capable of supporting complex pricing (leveraging seamless integration with TPM and ERP systems), complex DSD, and complex ordering situations, assuring full promotion quantities are ordered, and offering cross-selling opportunities.

TELUS continues to focus on the end-user experience, driving optimization, simpler execution workflows, cleaner screens, and making the solution much more amicable. They recently replaced the “traditional” main menu-driven interface with a new “Today” screen complemented by four easily switchable primary screens that give the user fast and easy access to all critical functions.

Coaching remains a priority for TELUS, recognizing many of the mobile users may be in a high turnover role. REE allows managers to monitor and evaluate each step of a retail call. Managers can also set activities for future visits and assign training videos as appropriate.

The POP6 mobile field force automation system is a rich data capture and reporting tool geared mainly towards Tier 2/3 customers. Note that many Tier 1 customers also find POP6 appealing for its ease of use, speed to implement, and as a differentiator for emerging markets. POP6 has built-in video tutorials and user guides, which are well-suited for onboarding new employees. The simple menu launch screen places all key info at a single touch, including products, outlets, and both a

personal and team calendar. The KPI dashboard is effective and understandable, even on a mobile phone. Users can review their performance after completing activities during a visit and areas for improvement are highlighted for corrective action.

POP6 makes it easy for HQ staff to connect with and communicate key info and documents with field reps as messages and marketing collateral can be designated to a subset of stores and POP6 will deliver it to the field reps servicing those stores. The latest version of POP6 now shares the same code base across Android and iOS, which will significantly speed up development.

Customers: Exceedra has advanced their eCommerce/B2B capabilities which include self-service ordering for retailers. This solution is fully integrated into the retail execution process serving to further drive efficiencies and effectiveness at retail.

Back Office (HQ): TELUS allows retail support functions to effectively manage and coordinate activities to enable what TELUS has labeled “Margin Growth Realization” (MGR). Margin Growth Realization requires coordination between RGM strategies and retail execution to drive “perfect store” execution in order to maximize margins. HQ roles have a clear and timely view of KPI performance and retail execution outcomes. They can also quickly and easily build custom KPI monitors to track performance and execution. Power BI capabilities now provide flexibility to view KPI data in the most effective and productive way. Note that back-office users do not need a Power BI license to enjoy these capabilities. Those in HQ roles also have a spectator view to retail gamification metrics (KPIs), which provide a fun way to effectively monitor product, promotion, and field team performance.

Analytics: With Tabs Analytics as part of the TELUS Consumer Goods solution suite, TELUS has analytics capabilities that enable enhanced retail activity optimization, authored reporting, and visualization. Machine Learning algorithms automatically define an automated visit plan based on multiple factors beyond geography. Analytics also drive the in-store process, informing the user what to do on a store visit and automating the delivery of relevant data (sales trends, exceptions, messages) to the mobile device.

TELUS can now embed operational and analytical reports in Power BI. This provides clients with all the benefits of Power BI, including a large variety of dashboard options, chart types, and powerful paginated table reporting. Clients can create their own dashboards using predefined metrics. Role-level security provides the ability to enable access to reports and data for specific user groups. TELUS analytics also includes a new automated health-check monitor for web services to ensure complete and high-quality data.

Data Approach: TELUS provides an extensive data lake environment, consolidating and transforming both internal and external data sources. Their Data Harmonization and Promotion and Sales Analytics capabilities are powered through the ingestion of internal, syndicated, retail execution, and Third-Party data sources. This approach to data and integration serves to connect the organization across all planning and execution functions, including the extended end-to-end sales process, promotion planning, and supply-chain processes.

Enterprise Integration: TELUS has created a data continuum between TPM and Retail Execution that enables a significant level of granularity and precision of the analysis of promotional execution and customer strategies. Promotion models and pricing coming from TPM and ERP are integrated as part of the retail solution. All promotions, mechanics, details, conditions, discounts, and exceptions are automatically ported into Retail Execution, where they become actionable items that

are measurable down to the level of the store and product at any given point in time. Moreover, all qualitative and quantitative data captured in REE flows back into TPM for promo post-event analysis

Strengths & Key Differentiators: TELUS has a proven ability to manage large volumes of data, apply ML and AI capabilities, and connect with their TPx platform or other TPx and ERP solutions. They are skilled in data harmonization, which is critical to developing seamless eCommerce capabilities. Advances in their Rapid Image Recognition provide further efficiencies at retail for both their REE and POP6 solutions. Their coaching capabilities help clients get the most from their field sales teams, even those with high turnover. In addition, their backend field manager application assists with the processes around territory management, route planning and optimization, and best practice sharing. TELUS offers L1 and L2 support for their products, thus offering a turnkey solution to clients who seek this service.

Opportunities: As virtual and self-service retail calls become more common, TELUS has the opportunity to enhance their existing B2B capabilities. Extending analytics and other mobile efficiencies like image recognition will serve to support the margin growth realization mission while strengthening retail partnerships.

Vendor Trends & Outlook: The TELUS Consumer Goods portfolio now includes Blacksmith Applications (food service) and TABS (analytics & insights). This enables TELUS to offer a deep and broad range of both solutions and services. TELUS has demonstrated a commitment to the end-user experience and many recent enhancements are the result of their Client Co-creation program. The TELUS Consumer Goods portfolio also provides new opportunities across the food chain, including sustainability and food safety. All these capabilities position TELUS to continue to be a trusted partner for the food industry and CPG customers.

Adjacent Offerings: Foodservice, rebate management, ERP, supply chain, warehouse management, data management, analytics & insights, CRM, TPM, and integrated B2C and B2B order management (eCommerce).

Evaluate TELUS When: You seek a partner with deep end-to-end sales, distribution, and analytics capabilities and experience. Also, when training and help desk support are key requirements. If you are also evaluating an accelerated implementation approach involving multiple countries that share a common business logic.

RetX Best-in-Class Distinctions: Analytical Insights, Coaching, Connected Enterprise, Predictive and Prescriptive Analytics (AI/ML), and Retail Merchandising.

