

## Peloton Consulting Group's Oracle Cloud EPM Planning Solution for Consumer Packaged Goods

CPGXcelerate is an industry-specific planning solution designed to bring best practices for financial and operational integration to Consumer Packaged Goods organizations in a way that maximizes time-to-value and ROI. Built on Oracle Cloud EPM technology and enhanced with AI and machine learning capabilities, this solution addresses common planning complexities faced by most CPG companies – from demand modeling and price-volume-mix analysis to trade promotions and customer profitability.

Unlike generic planning tools, CPGXcelerate speaks the language of consumer packaged goods, understanding common product structures, promotional dynamics, channel complexities, and the intricate relationships between consumer behavior and financial outcomes. Our solution integrates seamlessly with existing S&OP, ERP, and trade management systems to create a unified planning environment that enables data-driven decision-making across your CPG organization.

CPG Planning Challenges ~ Consumer packaged goods organizations face unique planning complexities that generic solutions cannot adequately address.



### Operational Complexity

- Disconnected planning processes too cumbersome to quickly model demand scenarios.
- Difficulty managing multi-channel operations with varying customer requirements and pricing structures.
- Limited visibility into profitability at the product, customer, and channel level.
- Challenges in incorporating consumer trends, seasonality, and promotional lift into financial plans.

### Market Dynamics Challenges

- Systems built yesterday do not reflect today's omnichannel reality, preventing accurate price-volume-mix analysis.
- Multi-variant plans reflecting consumer behavior and market dynamics are simply unachievable.
- Inability to model the financial impact of new product launches, pricing changes, or market expansion.
- Difficulty analyzing the effectiveness of trade promotions and marketing investments.

### Financial Planning Integration Issues

- Recurring pressure to optimize gross margins while remaining competitive on pricing.
- Fragmented planning processes that don't leverage CPG best practices.
- Time-intensive requirements gathering and implementation phases for generic solutions.
- Lack of industry-specific templates and business logic for CPG scenarios.
- Insufficient predictive capabilities for demand forecasting and promotional planning.

## Our Approach

### Pre-Built CPG Content

- Industry-specific templates covering all aspects of CPG planning from demand modeling to customer profitability.
- Pre-configured business logic for revenue, gross-to-net pricing, cost of goods sold, and price-volume-mix variances.
- Standardized delivery methodology that reduces implementation risk and accelerates time-to-value.
- Flexible architecture that can be deployed as is or customized as a foundation for tailored solutions.

### Comprehensive Planning Integration

- **Driver-Based Sales and Gross Margin Planning:** Multi-channel, product-based modeling for revenue and COGS at the SKU level, incorporating demand drivers, such as consumer trends, seasonality, and promotional lift.
- **Advanced Demand-Driven Modeling:** AI and ML-powered scenario modeling for new product launches, pricing changes, and market expansion strategies.
- **Trade Promotion Optimization:** Pre-configured analytics for promotional effectiveness and ROI analysis.
- **Financial Statement Integration:** Delivered integration between sales, production, and financial planning.

### Expert CPG Implementation

- Gap-fit analysis of pre-built logic to CPG-specific requirements.
- Model integration with existing S&OP systems and trade management platforms.
- Business logic configurations tailored to consumer behavior and market dynamics.
- Comprehensive user and admin training with ongoing support.
- Go-Live support with production deployment assistance.

## Technology Foundation

CPGXcelerate is built on Oracle's robust Cloud EPM platform, providing integrated financial planning, budgeting, and forecasting capabilities that drive accurate, data-driven decision-making across your CPG organization. The solution leverages Oracle's Intelligent Performance Management capabilities to deliver AI-powered predictive analytics, enabling proactive demand forecasting and promotional optimization.

Our comprehensive integration capabilities ensure seamless connectivity with your existing S&OP, ERP, and trade management systems, creating unified data flow across the entire CPG value chain. This integrated approach eliminates data silos and provides a single source of truth for all CPG planning activities.



## Benefits

### Accelerated Implementation

- **Reduced Cost:** CPG-specific logic is pre-built, allowing skilled resources to focus on adapting the model to organization-specific nuances rather than building from scratch.
- **Faster Requirements Phase:** Industry methodologies drive out requirements more efficiently, reducing capital costs and implementation timeline.
- **Rapid Deployment Option:** Option to rapidly adopt the accelerator as built, connect sources, and start planning. Teams are empowered to explore the capabilities of the software and evolve into the platform.

### Enhanced CPG Visibility

- **Operational Connectivity:** Demand planning, promotional planning, and financial planning work in integrated concert for improved decision-making and profitability optimization.
- **CPG Clarity:** Complete visibility into core assumptions that serve as the basis for demand and pricing plans, enabling better insights as market conditions evolve.
- **Scenario Modeling:** Ability to quickly model different planning scenarios and drive team consensus on go-to-market strategies.

### CPG Best Practices

- **Industry Expertise:** Introduction of proven CPG and Oracle planning methodologies unlocks new efficiencies and methods of thinking.
- **Comprehensive Coverage:** Integrated platform approach covering all key planning areas from demand and sales to trade promotions and customer profitability.
- **Continuous Evolution:** Framework allows CPG finance teams to continuously evolve into increased value-add roles for business partners.

### Proven CPG Results

- **Tailored Solutions:** Pre-configured solutions specifically designed for consumer-packaged goods industry nuances and complexities.
- **Proven Deployment:** Standardized delivery methodology with reduced implementation risk and increased time-to-value.
- **Expert Support:** Ongoing guidance from Peloton's CPG industry experts with deep technical and operational expertise.

## Key Capabilities

### Flexible CPG Planning

- Product, customer/channel, and corporate planning with multi-dimensional profitability analysis.
- Driver-based planning incorporating consumer trends, seasonality, and promotional dynamics.
- Multi-channel revenue optimization with price-volume-mix reporting.

### Product & Customer Profitability Analysis

- Plans extend to SKU and customer level, enabling market-facing decisions at an operational level.
- Position-based analysis builds profitability insights from the ground-up.
- Customer segmentation and channel performance analytics.

## Detailed Gross Margin Analysis

- Includes full gross-to-net pricing components with flexible standard cost line items.
- Plan and actuals analyzed across business dimensions using Oracle Profitability & Cost Management (PCM) module.
- Utilizes data from Sales & COGS plans to drive actionable analysis on margin optimization.

## Advanced Demand-Driven Modeling

- Consolidated financial plan flows into scenario modeling capability with AI and ML-powered predictive capabilities.
- Financial impact modeling for new product launches, pricing changes, and market expansion.
- Trade promotion effectiveness analysis and optimization.

## Pre-Built Analytics

- CPG-specific reports and dashboards for promotional analysis and customer profitability.
- Consumer trend monitoring and market performance tracking.
- Trade spend ROI calculations and promotional lift analysis.

## Why CPGXcelerate?

CPGXcelerate is an industry-specific planning tool, not a generic planning model. Peloton has developed this service to capture the leading practice methodologies for building the financial plan and connectivity across CPG processes. Utilizing our research and development to help implement modern cloud technology is an opportunity for competitive advantage.

- **Tailored for CPG:** Our pre-configured solutions understand and address the nuances of the consumer packaged goods industry. We speak the language and are grounded in the underlying complexities of planning in CPG.
- **Successful Deployment:** Pre-configured solutions and standardized delivery methodology reduces implementation risk and increases time-to-value. Available as a rapid-deployment solution or customizable foundation.
- **Comprehensive Planning:** Integrated platform approach covering all key planning areas, from demand and sales to trade promotions and customer profitability.
- **Expert Support:** Benefit from continuous guidance and support from Peloton's experienced consultants with technical and industry expertise.

## About Peloton Consulting Group

Peloton Consulting Group has the vision and connected global capabilities to help organizations envision, implement, and realize the benefits of digital transformation. Our team combines best practices, industry expertise, and technical know-how to make digital transformation a reality through EPM, ERP, SCM, HCM, CX, Analytics, and Data Management for the cloud. Through our connected capabilities, we bring people, processes, and technology together to help organizations go further, faster. That is the Peloton way.

Ready to accelerate your CPG excellence?

Contact us at: [pelotongroup.com/contact-us](https://pelotongroup.com/contact-us)