

Developed a growth plan pivoting from historical mass media brand strategies by focusing on brand personalization leveraging digital media and loyalty



Scenario: A provider of retailer services was looking to accelerate impact and growth in retail through investment in alternative product offerings to capitalize on the growth across Omni-Channel and Media.

The Challenge: The pace of change across the retail landscape along with the shift in focus of retailers (accelerated by COVID-19) posed a risk to their core business growth, but acquisitions over time had put them in a position to entertain different avenues in retail. They were looking to develop a roadmap for the next 1-3 years that would position them in the forefront of Marketing and Media in Omni-Channel

Action steps and Results:

Formulated a differentiated strategy with key C-Suite executives by gaining a deep understanding of their current capabilities and competitive landscape by conducting a comprehensive assessment of products and offerings that had growth potential in the market but also fit with future investment strategies and their cultural ability to stretch beyond current offerings. The size of the prize was quantified for multiple options and led the thought process to understand barriers to implementation. The selection of a path forward and the creation of a roadmap was outlined and presented to the board for adoption and with board approval they embarked on a project to enable capabilities through a buy, build, rent approach over the next 12 months.

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Formulated a strategy for market entry and expansion of a young plant-based brand into retail



Scenario: A plant-based CPG was not able to gain traction within retail, they filled a niche in a mainstream dominated segment that was experiencing significant growth and increased development across Gen Z and Millennial customer segments

The Challenge: The CPG was not articulating the story with the appropriate insights and trends while retailers were too busy to spend time to entertain the expansion of plant-based into this segment. Penetration of smaller brands was low in this segment and bigger brands protected the space on shelf through investment and package innovation. This segment was under siege by pure play ecommerce players and as such retailers were not increasing space or placing too much consideration on niche opportunities

Action steps and Results:

Leveraging total store plant-based trends combined with the segment trends both of which had been accelerating over the last 5 years, we positioned the story to align with the retailers' priorities around customer, share and revenue growth. The CPG was able to pivot the storyline going forward to ensure that retailers received a short but relevant sale pitch that would drive interest. The CPG was able to get a commitment to be considered for an early cut-in prior to the scheduled category reset with a major national retailer as a result of the new approach.

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Performed a viability study to inform an acquisition of a revenue management solution



Scenario: Private Equity was looking to assess a revenue management software providers commercial positioning and growth potential across various sectors of the consumer-packaged good space to inform a pending acquisition.

The Challenge: The solution provider had positioned their growth proposition as expansion into Retail. The expansion was not fully understood by the client and needed an assessment of capabilities, transferability and adoption of core CPG revenue growth management principles and priorities into retail. The push from the provider was a heavy focus was on the SAAS revenue potential through expansion into retail and not necessarily the viability of the end user finding value in a RGM solution in retail environment.

Action steps and Results:

Participated in a series of sessions to understand capabilities of current offering and translated the technical aspects into an end user capability assessment. Identified that the narrower brand focus and the solution execution capabilities would not translate in the current form to retail. The scientific assessment of optimization was able to span both consumer packaged goods and retail but the expansion of the product universe and the application of trade funds and ultimately promotion and price optimization made it considerably more complex. The Private Equity client was able to determine commercial positioning and growth potential of the solution (in its current form) more accurately and determine a more accurate acquisition value. They funded the acquisition of the solution provider at fair market value not over valuing the acquisition price based on capabilities that did not translate to retail.

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Led strategy around acceleration of productivity gains for a retailer, through automation and optimization of promotions through technology



Scenario: A retailer was looking to accelerate impact and growth in omni-Channel through cost saving initiatives driven by automation and optimization of markdown spend.

The Challenge: One of the largest contributors to financial performance for this retailer was the incrementality of promotions. Merchants were unable to dedicate the resources necessary to ensure every promotion resulted in a positive ROI for the company. This was in part driven by the tens of thousands of promotions being managed annually. Merchants were spending more time on the administrative function of executing promotions and very little time setting a long-term strategy and optimizing the strategy to achieve category and store financial and customer growth goals.

Action steps and Results:

After an extensive discovery process the decision to build vs buy was evaluated and based on the urgency for results and the current scientific capabilities and IT resourcing an extensive RFP was conducted to enter into a SaaS agreement that would enable long term planning and collaboration while optimizing promotions for the entire store. The implementation process drove a longer-term planning cycle allowing for better alignment across the supply chain and reducing time taken to manage promotions on a weekly basis. Promotions and events were adjusted to drive a positive ROI on all promotional activity resulting in millions of dollars that were able to be reinvested back into the business.

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Developed a strategic collaboration process for a multi-billion-dollar CPG to maximize ROI with one of the leading retailers in the US.



Scenario: A CPG was looking to improve performance with a retailer and optimize trade spend, while establishing themselves as a strategic partner.

The Challenge: The accelerated pace of change in the CPG industry (Post COVID-19) led to a tremendous amount of complexity with the retailer and the CPG. This was compounded by a disconnect of strategic plans and organizational changes with both parties. Lines of communication that enabled strategic alignment and tactical execution broke down and threatened to impact collaborative growth moving forward.

Action steps and Results:

Developed a framework to assess organizational structure and capabilities and mapped these back to Retailer structure and strategic positioning, this Informed change management activity allowing the CPG to establish an organizational and strategic plan to navigate current and future changes.

Built out a roadmap to deliver growth through collaborative plans (strategic in nature) across Omnichannel, specifically focused on Digital Marketing, Trade Optimization and Strategic Pricing across Omnichannel.

These steps positioned the CPG as a strategic growth partner with the retailer allowing for deeper strategic collaboration that resulted in expanded distribution and a more efficient trade spend.

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