

# Stronger Sales Growth

Through Smarter Assortment, Better Quantities,  
and 5x Faster Orders

A Practical Guide to Data-Backed CPG Sales Execution.



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## Executive Summary

**CPG sales teams face growing pressure.** They must grow revenue, improve assortments, and protect availability, all with less time and more SKU complexity. The gap isn't strategy. It's the moment when strategy becomes an order. When order decisions fall short, the impact is immediate: missed sales, assortment gaps, stockouts and overstocks, and inconsistent execution across outlets.

Sales teams know their customers. The real challenge is scale. Making the right decision, for the right outlet, every visit.

**Suggested Order closes this gap.** It turns existing data into clear, outlet level guidance inside the ordering workflow, delivering **better orders, faster visits, and stronger execution at scale.**

## Who is this playbook for?

This playbook is for CPG sales leaders and field teams focused on turning strategy into revenue at the outlet level.

Most organizations already have the right tools. What's missing is consistent adoption at scale. Data goes underused; decisions don't travel, and impact stays limited.

This playbook tackles those challenges head on, without changing how sales teams work.

## The problem: hidden gaps in CPG sales execution

The biggest losses in CPG sales execution don't come from poor strategy. They come from inconsistent decisions at the moment orders are created.

When assortment and quantity decisions vary by rep or visit, value is lost, showing up as:

- Missed sales and lower order values.
- Weaker assortment quality and SKU penetration.
- Persistent stockouts and overstock.
- Inconsistent execution across customers and territories.
- Limited ability to scale top-performer behavior.

This is not an effort problem. Sales teams are experienced and committed. The challenge is complexity: making the right decisions for every outlet, every visit, at scale.

## The gap: data exists, but decisions don't travel

Most CPG organizations already have systems in place (ERP, POS, forecasting, inventory, and promotional systems...). Yet execution remains inconsistent. Field adoption is uneven. Why?

- Data is fragmented across systems.
- Insights are aggregated, delayed, or retrospective.
- Guidance is hard to trust and act on.

As a result, reps lack clear, outlet-level direction, and often ignore or override guidance.

## The solution: Suggested Order as a decisioning layer

Suggested Order doesn't replace your systems. It connects them.

It sits on top of your existing landscape and translates data into clear, outlet level ordering guidance - inside the workflow sales teams already use. This shifts execution from:

- Reviewing data -> to acting on it
- Individual judgement -> scalable best practice

The outcome is simple: better orders, stronger execution, and measurable impact.

**Suggested Order**



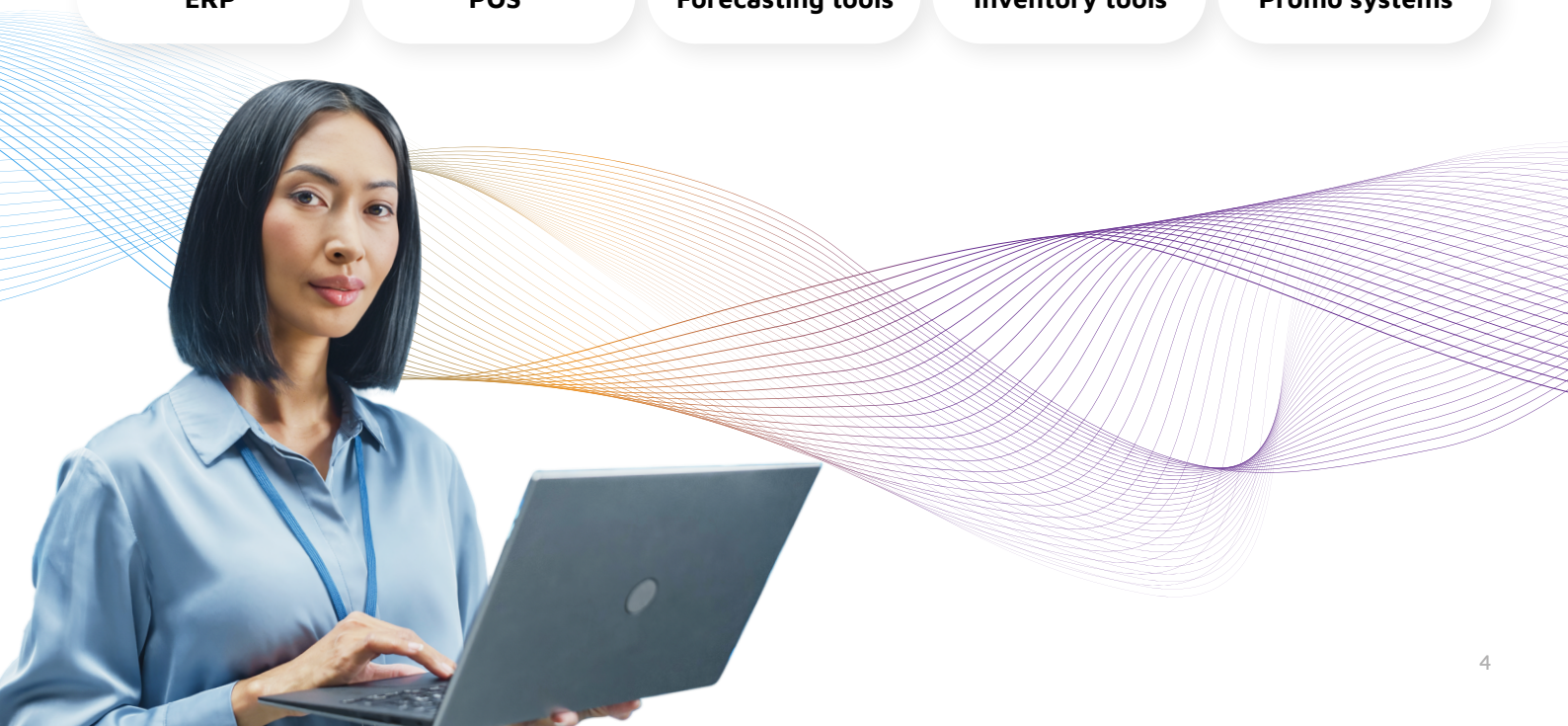
**ERP**

**POS**

**Forecasting tools**

**Inventory tools**

**Promo systems**



## What Suggested Order does

Suggested Order helps sales teams build better orders at outlet level, both what to sell and how much to sell.

It brings together enterprise data to prepare a draft order for each sales visit. One that reps can understand, trust, and use with confidence.

The Suggested Order model focuses on two decision areas: **Assortment** and **Quantity**.

## The Suggested Order system (the core model)

### Suggested Assortment: grow revenue through better SKU decisions

Suggested Assortment recommends the most relevant products for each outlet. Machine learning–driven models generate recommendations based on local demand, outlet characteristics, and commercial priorities.

This helps sales teams:

- Identify missing SKUs and expansion opportunities.
- Improve SKU penetration.
- Build assortments based on relevance, not habit.
- Explain recommendations to retailers with confidence.
- Prevent underselling of quantities.

**Enterprise and outlet-level signals**

**Business rules and guardrails**

**Advanced store profiling**



### **Better recommendations**

- Commercially sound
- Easy to explain

## Suggested Quantity: protects revenue with the right order volume

Suggested Quantity protects revenue by recommending how much to order for each product. It balances sales patterns, inventory signals, and commercial constraints to improve quantity accuracy, without extra effort or planning.

This helps sales teams:

- Reduce under-ordering and missed sales.
- Avoid over-ordering and waste.
- Spot upsell and cross-sell opportunities.
- Protect availability across territories.

**The result:** More accurate orders. Fewer stockouts. Revenue is protected.



### Suggested Order



#### Suggested Assortment

Sell the right products



#### Suggested Quantity

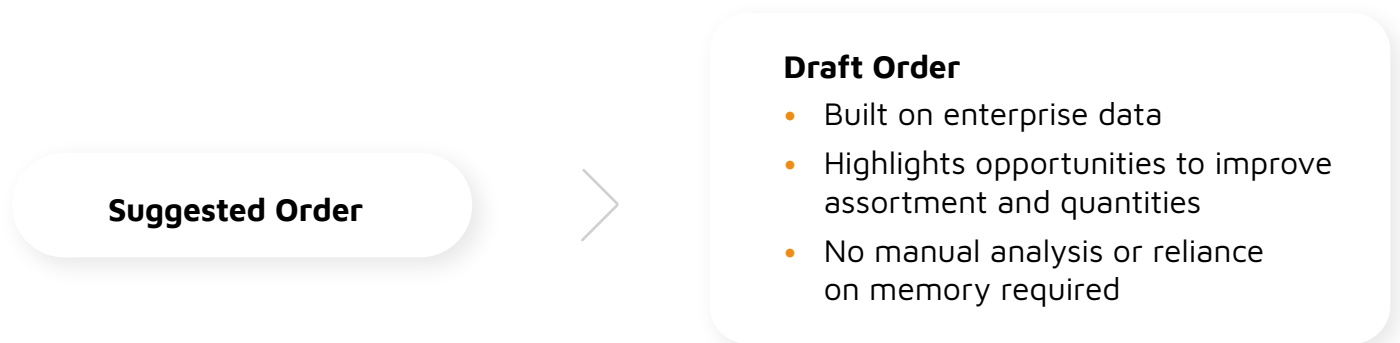
Get the quantities right

## How it works in the field



Suggested Order fits seamlessly into existing workflows, helping reps build better orders with outlet-level, data-driven guidance.

### 1. Pre-visit: save time with a data-backed plan



#### Draft Order

- Built on enterprise data
- Highlights opportunities to improve assortment and quantities
- No manual analysis or reliance on memory required

Before a visit, Suggested Order prepares a draft order tailored to the outlet. Reps can:

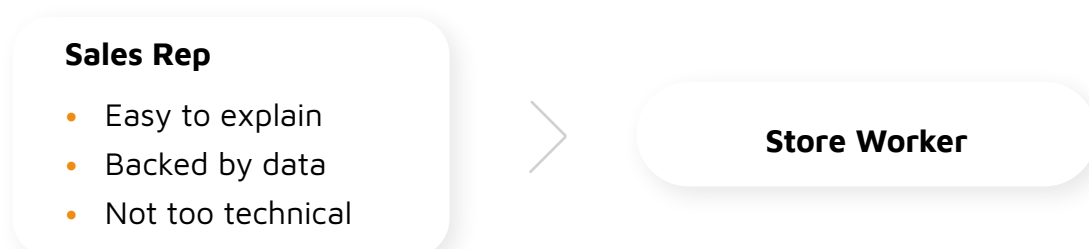
- Start with a data-backed order. Not a blank screen.
- See what's changed since the last order.
- Spot opportunities to grow the basket and improve availability.

**Result:** Reps arrive with a clear plan. Time is spent selling - not rebuilding orders.

### 2. In store: more confident conversations and stronger retailer relationships

Suggested Order guides better sales conversations. It turns complex data into clear, outlet-specific recommendations.

**Result:** more confident conversations, stronger retailer trust, less guess-based decisions.



#### Sales Rep

- Easy to explain
- Backed by data
- Not too technical

#### Store Worker

### 3. Post-visit: continuous improvement and measurable impact at scale

Suggested Order captures outcomes to refine future decisions, helping organizations to:

- Track field adoption and usage.
- Understand what sells, where, and why.
- Improve decision quality over time.

**Result:** Leaders can scale best-selling behaviors and measure impact, not just activity.

Accepted  
Recommendations

Suggested  
Order System

Rejected  
Recommendations



## The Three Pillars as an action plan

**Suggested Order creates value only when behavior changes.**

These pillars translate strategy into clear actions, ownership, and measures. Each pillar defines what to change, who must act, how success is measured, and what impact to expect.

### Pillar 1: Grow the basket (Assortment quality, cross-sell, up-sell)

#### What it drives:

- More relevant assortments at outlet level.
- Better SKU penetration and mix.
- Increased order value and quality.
- Stronger perceived value for retailers.

#### Leadership actions:

- Make basket growth a planned activity, not an in store improvisation.
- Position Suggested Assortment as a sales support enabler, not a control tool.
- Define priority SKUs by outlet type, not one generic list.
- Require pre-visit cross sell and up sell preparation.
- Reinforce decisions based on local outlet context.

#### Sales rep actions:

- Start every visit with Suggested Order.
- Use Suggested Assortment to identify gaps and expansion opportunities.
- Clearly explain product relevance to each outlet.
- Prioritize value-driving SKUs over volume.

#### KPIs to track:

- Assortment quantity per outlet.
- SKU penetration per outlet segment.
- Share of orders with cross sell/up sell additions.
- Average order value (AOV).

#### Expected impact:



**Up to 25%** improvement in assortment quantity.



**Higher visibility** of cross sell and up sell opportunities.



**Larger, higher** quality baskets.

**Outcome:** Orders reflect true outlet potential. Revenue grows through better mix, not pressure selling.

## Pillar 2: Protect availability (reduce stockouts & overstocks)

### What it drives:

- On shelf availability.
- Lost sales and service levels.
- Retailer trust.
- Revenue protection.

### Leadership actions:

- Treat quantity accuracy as a revenue lever, not an operational detail.
- Make data backed quantity recommendations the default starting point.
- Define and enforce clear ordering rules (minimums, listings, promos, constraints).
- Ensure Suggested Order is used during visit preparation, not only in store.
- Shift performance discussions from “order size” to availability and lost sales.
- Share early wins to build confidence and trust.

### Sales rep actions:

- Start every visit with Suggested Order quantities.
- Adjust quantities consciously, not by habit or estimation.
- Follow defined rules consistently.
- Focus on avoiding missed sales, not just reducing stock.

### KPIs to track:

- Stockout rates.
- Under selling vs. demand.
- Lost sales value.
- Compliance with quantity recommendations.

### Expected impact:



**Up to 20%**  
reduction in under selling.



**Fewer stockouts**  
and less reactive fixing.



**2x–6x ROI within  
12–24 months.**

**Outcome:** Quantity accurate orders.  
Better availability. Revenue is protected.

## Pillar 3: Win back selling time (Speed and standardization across markets)

### What it drives:

- Time spent per visit.
- Sales productivity.
- Consistency of execution.
- Scalability across teams and markets.

### Leadership actions:

- Make the draft order the default starting point.
- Actively drive adoption across all teams, not just pilots.
- Standardize order preparation best practices.
- Measure time saved, not just usage.
- Protect saved time and reinvest it in selling, not admin.

### Sales rep actions:

- Use the draft order instead of building from scratch.
- Spend less time preparing orders and more time selling.
- Follow a consistent preparation flow across visits.
- Focus conversations on value, not administration.

### KPIs to track:

- Time spent on order preparation.
- Number of visits made per day/week.
- Adoption rate of draft orders.
- Share of time spent selling vs. admin.

## Expected impact:



**Up to 5x**  
faster order preparation.



**Higher** sales productivity  
without hiring more reps.



**More customer visits**  
and better conversations.

**Outcome:** More selling time. Stronger execution. Consistency at scale.

## Proof in practice: how data-backed decisions scale in the real world

Suggested Order is built on a simple idea: better decisions drive better execution at scale.

The following examples show how CPG organizations have translated enterprise data into clear, outlet-level action, and the impact that follows.

### Case study 1: Leading multinational beverage corporation



#### Challenge:

A locally successful optimization tool needed to scale rapidly across markets. However, differences in data, processes, and platforms risked increasing complexity and cost, limiting global rollout.

#### Our solution:

##### Domain

Scalable demand and execution optimization, transforming existing data into clear, repeatable decisions that could be embedded in daily commercial execution across markets.

##### Design

An industrialized and standardized solution built for scale, including:

- Consolidation of fragmented data into a single, consistent foundation.
- Standardized models to ensure consistent decision logic across markets.
- Scalable architecture enables fast deployment without added complexity.

##### Adoption

Designed for global rollout with minimal disruption. Standard workflows and shared logic enabled teams in different markets to adopt the solution quickly and apply insights consistently in the field.

#### Impact:

**50%** reduction in platform costs.

**40%** faster processing at scale.

**One standard** solution deployed across 28 markets.

#### The result:

What worked locally was successfully repeated globally.

## Case study 2: Global snack company

### Challenge:

Identifying assortment opportunities and creating accurate SKU-level orders was slow and error-prone. Manual repetitive processes in fragmented trade led to inconsistencies, limiting scalability and growth.

### Our solution:

#### Domain

Automated assortment optimization and order quantity prediction at store and SKU level, enabling data-driven sales execution and maximizing revenue opportunities through precise suggested orders.

#### Design

A scalable analytical framework with 3 integrated modules:

- Micro-segmentation to cluster stores by behavior and potential
- Recommended SKUs tailored to each store
- Quantity prediction for optimal order quantity per SKU

#### Adoption

Designed for easy adoption with automation, standardized workflows, and minimal manual effort, helping sales teams streamline orders and apply insights daily.

### Impact:

**10%** sales increase.

**5x** reduction in time spent weekly on order creation.

**Improved** accuracy of orders.



## Where to start: a 90-day pilot approach

When rolling out Suggested Order, you don't need to tackle everything at once. Instead, start small. Focus clearly. Scale what works.

### Step 1: Start with one pillar (Weeks 1-4)

Focus on a single, high-impact execution area. For example, assortment quality or availability. Define a focused scope:

- One market, region, or sales team.
- A clearly defined outlet segment.
- A small set of SKUs or categories.

**Why this works:** it reduces complexity and creates fast, visible wins.

### Step 2: Measure business outcomes (Weeks 4-8)

Shift the focus from usage to results. Track only what matters:

- Changes in availability or assortment quality.
- Improvements in order value.
- Reduction in missed sales.

**Key principle:** Success is measured in commercial impact, not tool usage activity.

### Step 3: Drive adoption early (Weeks 1-12, ongoing...)

Value is unlocked only when behavior changes. Focus on:

- Starting every visit from the recommended draft order.
- Reinforcing consistent usage through sales leadership.
- Sharing early wins to build trust and momentum.

### Step 4: Scale what works (Weeks 8-12+)

Once results are clear, expand with confidence:

- Extend to new teams or regions.
- Add additional pillars (e.g. assortment, quantity optimization).
- Standardize best practices across markets.

By starting small, proving impact, and scaling what works, CPG organizations can move from isolated improvements to repeatable, global execution. Just like in the examples above.

# How sales leaders can talk to IT about Suggested Order

Suggested Order isn't about new tech. It's about getting more value from what you have. Frame IT discussions around alignment, not replacement. Be upfront. Use these talking points:

## What Suggested Order is not/does not

- Another forecasting or inventory tool.
- A way to bypass governance, data ownership, or IT controls.
- A request to build or replace the current platform.
- Does not produce more reports or aggregated insights.

## What Suggested Order does differently

- Bridges the gap between enterprise data and field execution.
- Respects existing architectures + workflows.
- Acts as a decisioning + translation layer.
- Turns data into guidance that sales teams can use and trust.
- Drives real, measurable business outcomes.

The shift is simple, but powerful. Data goes from simply being available to being applied during every visit.

## A shared framing for Sales and IT:

“No new data. No new platforms. Just turning what we already have into outlet-level decisions that drive adoption, consistency, and revenue.”

## Position Suggested Order as:

- A way to generate more revenue from existing data.
- A way to increase adoption without added complexity.
- A clear alignment between sales outcomes and IT priorities.

## Before vs. After

### What CPG teams have today

- Disconnected systems
- Aggregated insights
- Low adoption

### With Suggested Order

- Connected enterprise data
- Outlet-level recommendations
- Trusted, explainable decisions in the field

# What success looks like: from better orders to execution at scale

## Key success indicators:



### 5x faster

order creation, and reduced prep time.



### More time spent selling

and less on estimating.



### 2-5% sales uplift

from better availability and assortments.



### More confident

consistent sales conversations.



### Best practices

standardized and scaled across teams.



### Clear performance

visibility, improving over time.

**In short:** better orders drive better execution. And that execution scales.



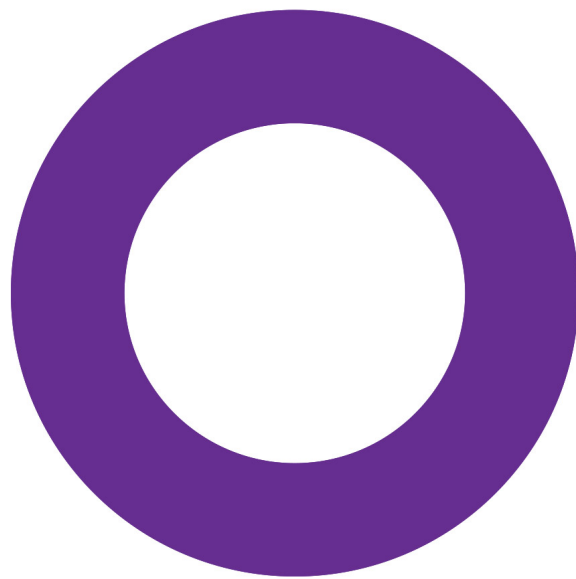
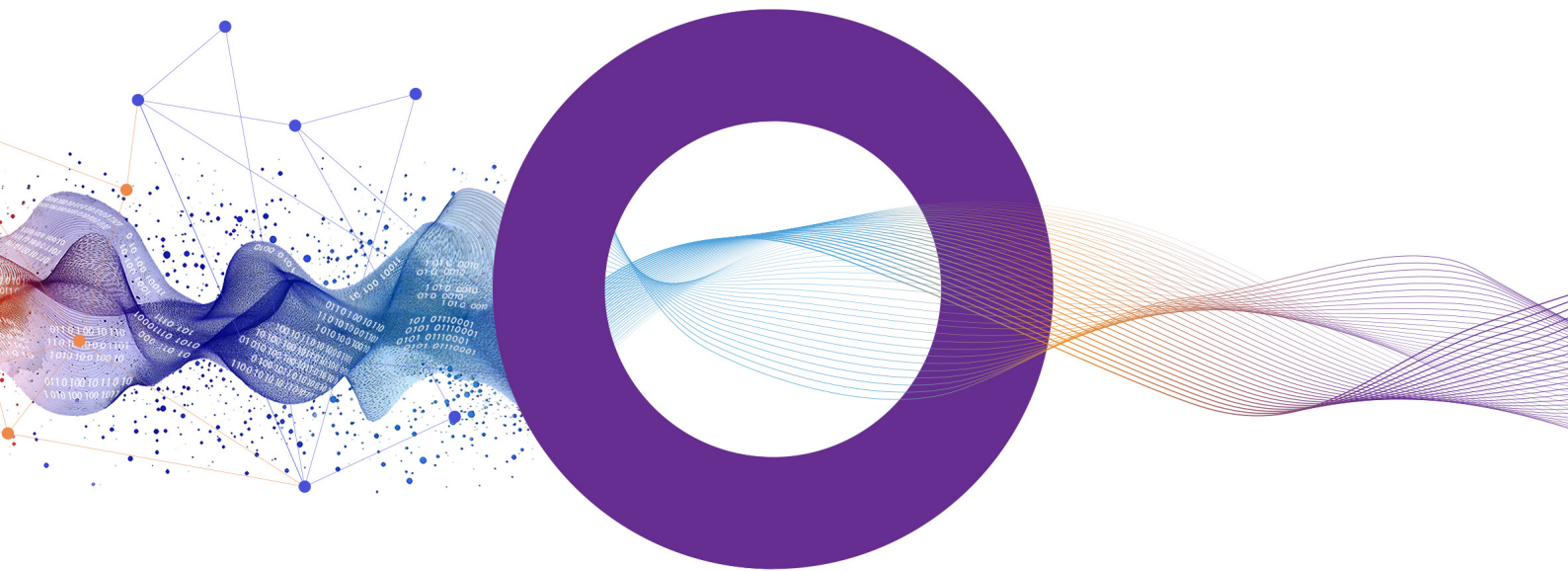
## Next steps

Stronger sales execution doesn't require more tools - just better decisions, made consistently.

**Start small, drive adoption, and scale for measurable growth.**

[Book a demo](#)





**Achieve More With Data & AI**