




Promotion Optimization Institute, LLC

2022 Vendor Panorama for Retail Sales Execution and Monitoring in Consumer Goods

SoftServe Business Systems – SalesWorks Enterprise

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business systems

Profile: SoftServe Business Systems (SSBS) has developed a digital ecosystem for all FMCG sales processes, including Sales Force Automation, Distribution Management System, Trade Promotion Management, Integrated Business Planning, and Business Analytics. The suite of solutions is known as SalesWorks Eco-System and includes capabilities for Data Management, Distributor Management (DMS), Mobile SFA, Trade Promotions, Business Intelligence, Integrated Business Planning as well as modules to support AI-enabled shelf recognition, gamification, eCommerce, and Telesales for B2B sales and self-service capabilities.

Geographic presence: Europe (85%), AsiaPac (14%), and North America (Mexico) (1%).

Total consumer goods users (seats): 50,000.

Tiers represented: All.

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

Industries: All FMCG, except Durables and semi-durables.

Configuration/Customization: In addition to flexible configuration options, SalesWorks does allow for customized Plug-in modules when a desired business need cannot be met. Plug-ins are designed to add a specific feature to the solution without having to edit the main source code.

Technology architecture/delivery options: On-premise, hosted/private cloud, Multitenant SaaS.

Service partners: None.

Technology partners: Microsoft, Cisco, Dell, HP. Also, for Hosting: Kyivstar, Xelent, Dataline, Hetzner. And Azure, OKTA, Pidentity for identity capabilities.

User experience: The SalesWorks mobile app is easy to navigate and provides quick access to key information, including planned calls/routes, stock, shipments, POS, and sales plans. There is closed-loop linkage with the SSBS trade promotions tool for promotional plan information, scheduling, and inflight monitoring. The SalesWorks Eco-System is built on data, and SSBS has strategically applied AI and ML to deliver AI-driven retail execution. SalesWorks applies artificial intelligence to the retail POS and SFA input to guide reps on store calls and daily routes. The AI Shelf Recognition works both online and offline and will determine item presence (and out of stock), share of shelf, planogram compliance, and current price (from shelf tags). AI takes this info and drives it right into the call process, providing direction on actions to take. Depending on required actions, this can be communicated through additional tasks in the call process, or with a pop-up right on the photo image directing the rep on actions to take. This is all part of the SSBS Smart Helper capability, providing automatic recommendations of steps to take to attain a Perfect Store.

SalesWorks also include AI-based suggested orders to guide the rep to ordering the proper items and quantities. AI and advanced analytics assist sales agents on how to improve overall portfolio performance by adding new SKUs which have the highest volume opportunities for a specific store.

The SalesWorks webtool provides the back-office worker with the tools and visibility to manage routes and retail activities. Activities (tasks) and suggested orders can be pushed to SFA, a key feature for sales reps and merchandisers. SmartManager provides a single tool for managers to execute all key managerial functions, including planning, execution, motivation, coaching, and control. Field teams are further motivated by a gamification app that has proven to boost tracked KPIs and increase employee engagement.

SalesWorks Eco-System extends the user experience beyond field sales and HQ users. The B2B eCommerce and B2B Telesales modules are geared towards effectively and efficiently addressing CPG challenges. Known as e-Assistant, the B2B eCommerce solution is a web application where retailers can place and track an order online, activate trade promotions, participate in loyalty and motivational programs, and give feedback in real time. E-assistant is fully integrated with the SSBS ecosystem, so complex pricing, discounts, promotions, and loyalty incentives can be fully personalized and defined per retailer location. E-assistant can provide assortment and stock recommendations, as well as cross-sell/up-sell recommendations.

The Telesales module is also fully integrated in the ecosystem to allow for a true hybrid approach to retail coverage and execution. Retail execution functions can be addressed by any combination of field reps, virtual telesales agents, and by the retailer themselves with e-Assistant. All activities and interactions are visible to all parties.

Data Approach: SoftServe has established data management as a foundation to their platform. This is critical to support their large Distributor (DMS) user base as well as provide the fuel for their AI-driven approach to retail execution. Their Data Quality Management (DQM) module is committed to providing customers with clean and accurate data and includes algorithms to check for data quality and mapping/harmonization, including deduplication of POS. Centralizing the data across their ecosystem enables real-time visibility and AI-enabled processes for field teams, HQ teams, and customers (via B2B e-Assistant).

Analytics: Built with data as a core foundation to the SSBS platform, analytics is one of SSBS' strong points. SoftServe prides themselves on data accuracy and has applied ML algorithms to deliver. Both OEM analytics and In-house solutions are used depending on a client's needs and requirements. OLAP cubes provide the foundation and flexibility for creating reports and dashboards. SSBS is able to integrate data from multiple data sources and then leverage that data to provide analytics and insights across the ecosystem.

Vendor trend: SoftServe has a proven record of establishing a vision based on innovation and then delivering. They began with data and data quality as the foundation and have built around that with AI and advanced algorithms to support a flexible approach to retail execution.

Strengths: SoftServe's ability to integrate with Distributors and a client's systems is a core strength. The SalesWorks solution supports integration and instant data exchange with multiple distributors and logistics providers. A complex algorithm ensures high quality of data and eliminates errors and duplications. Their forward-thinking for B2B integration and communications with their B2B eCommerce and B2B Telesales modules provide flexibility and efficiencies to retail coverage. SoftServe has also developed a unique Gamification module to provide a solution to increase productivity and engagement, and bring fun into a routine job for frontline employees.

Challenges: SoftServe has an established base of clients in the Eastern European market. Their challenge is to expand their reach globally while continuing with their path to innovation and assisting current and prospective clients to fully leverage their offering.

Adjacent offerings: SoftServe offers a variety of distinct capabilities that can be implemented independent of their SalesWorks Eco-System suite of solutions. These include:

- **Distributor Management System (DMS)** – A service that provides data management, execution, and analytics/reporting for distributor managed sales.
- **TPM - PromoTool** – A tool designed to improve ROI of multiple promotional activities, provide better planning, accurate forecast, and ongoing tracking of results.
- **IBP - Integrated Business Planning** – A tool enabling creation of sales forecasts and plans in collaboration with different functions.
- **BI Tool** – A set of pre-defined reports and interactive dashboards visualizing the most critical business & financial KPI's.
- **AI Shelf Recognition powered with IR technology** – Artificial Intelligence and computer vision automate shelf audit and collection of assortment, pricing, and competitor product information.
- **B2B eCommerce** – A self-service portal for retailers enabling them to place and track orders and payments.
- **B2B Telesales** – A tool enabling order collection and processing over the phone.
- **Gamification** – Guides the behaviors of team members with the help of positive reinforcement, a “winner effect,” and other behavioral mechanics.
- **Smart Manager** – A single tool for managers to plan, execute, motivate, coach, and control field teams.
- **Data Quality Manager** – A tool allowing automatic data transfer from multiple sources and consolidating it in one single system with data verification algorithms in place.
- **ML/AI** – Advanced algorithms to support planning, visit steps, recommendations, and optimization.

Key differentiators: SoftServe's approach to employee engagement and motivation is a differentiator. This is evident not just from their gamification module or flexible loyalty program in e-Assistant, but also from their effective use of AI and predictive analytics, which guides field users to navigate the store call. Also noteworthy is their flexible approach to retail execution, allowing and integrating multiple coverage options (visit, telesales, self-service) to drive efficiencies. SoftServe has excellent client relations, and they also have a commitment to their own employees that is exemplary.

Outlook & prognosis: SoftServe has continued to build on their established client base, offering additional capabilities with their module approach with focus on AI-driven Retail Execution. Their forward-thinking and flexible view on retail execution positions them to expand both their capabilities and reach in the industry.

Evaluate SSBS SalesWorks when: You need a partner with a flexible platform for working in a diverse environment (distributors, merchandisers, internal field sales teams) with the capabilities to serve and motivate all users. The potential for plug-in customization also makes them a consideration for unique business requirements that may not fit standard offerings. You are looking for more automated sales execution where processes are supported with ML/AI.

Avoid SSBS SalesWorks if: You just need a basic merchandiser solution.

Distinctions: Distributor Management, Gamification, Social Selling, Virtual Calls/Telesales.

About the Authors



Pam Brown. As Chief Commercial Officer, Pam creates and executes POI strategy, research, and advisory, plus elevates practices and CPG and Retailer relationships.

Prior to joining POI, Pam was the Director of IT Governance for Del Monte Foods where she led IT Governance and the PMO. In her previous role as the Director of Sales Operations, she led: Sales Strategy & Operations, Sales Systems, and BI Analytics. She drove collaborative solutions and change across the organization based on corporate strategy and with the support of cross-functional partnerships.

Pam began her career at Unilever where she quickly progressed through numerous Retail Sales Execution and headquarter sales positions of increasing responsibility. She then joined Kayser-Roth and became the Western Division Sales Director for all Retail CPG business west of the Mississippi. Pam has 30 years of Sales & Systems experience and demonstrates a passion for creating a competitive advantage through high-performing teams. Pam earned her BA in Business Administration from the University of California at Riverside.

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A special thank you to **Michael Marzano** who is a POI Affiliate and supports the POI Manufacturer In-Store Retail Sales Execution report with Pam Brown. He participated in the RetX Vendor Panorama demo process and helped to support the report creation you have enjoyed. Mike's CPG experience spans the complete end-to-end fulfillment process from manufacturing to the last mile at retail. He has led projects driving improvements and efficiencies across S&OP, Territory Planning, Retail Sales Execution, Category Management, and Supply-Chain initiatives at CPG leaders, including Mondelēz International, Cadbury, and Kraft Foods. Mike has experience and expertise in Sales Force Automation, POS and Syndicated Data, On Shelf Availability, and Space and Assortment Planning. His experience in eCommerce and B2B selling covers multiple service models, including DSD, broker, Virtual/Telesales, and Food Service. Mike has excelled at coordinating cross-functional resources, including vendors and customers, to execute projects that deliver results.



About the Promotion Optimization Institute

POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving holistic enterprise planning and the promotion and distribution of consumer goods. Members of POI share cross-functional best practices in both structured and informal settings. Additionally, members benefit through our industry alliances, the Certified Collaborative Marketer (CCM)[™] program, and industry-leading summits around the globe. POI aims to instill a financial and metrics-based discipline not typically found with other trade groups. The goal of our innovative approach is collaborative promotion optimization. The focus is on the customer/shopper through sales, marketing, and merchandising strategies. Executive advisory boards keep us apprised of industry needs and help us provide desired outcomes for members, sponsors, and academia. For more information: Visit www.poinstitute.com or contact.

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