

# ICP600

## SAP Trade Management Business Process

### COURSE OUTLINE

Course Version: 017  
Course Duration:



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# Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

*Example text*

Window title

*Example text*

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# Course Overview

## **TARGET AUDIENCE**

This course is intended for the following audiences:

- Data Manager
- Project Manager
- Application Consultant
- Development Consultant
- Data Consultant
- Business Analyst
- Business Process Architect
- Business Process Owner/Team Lead/Power User
- Developer
- Enterprise Architect
- Industry Specialist
- Solution Architect





## **Lesson 1: Explaining the Motivation and an Overview of Trade Management**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the industry challenges
- Explain the end-to-end business process
- Explain the different business roles

## **Lesson 2: Explaining Key Elements for Success**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the importance of the end state analytic needs when implementing SAP Trade Management
- Explain the importance of change management in the organization
- Explain the importance of various testing cycles during the implementation



## Lesson 1: Gaining an Overview about Sales Planning and Budgeting

### Lesson Objectives

After completing this lesson, you will be able to:

- Get an overview about Sales and Budgeting

## Lesson 2: Performing the Planning Preparation

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the planning structure used in the business process
- Explain the main activities in the planning preparation

## Lesson 3: Performing the Target Distribution

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the main activities of target distribution
- Define channels and categories
- Explain the commercial conditions
- Explain the top-down distribution of targets

## Lesson 4: Performing the Funds Setup

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the funding structure
- Explain dynamic funds and business advantages
- Explain fixed funds and its usage

## Lesson 5: Explaining Customer HQ Negotiation

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the main activities in Customer HQ negotiation

## **Lesson 6: Explaining Planning Management**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the main activities in initiating the customer business planning
- Explain the bottom-up planning activities
- Explain the approval process and version management

## **Lesson 7: Performing Focused Execution**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain how the forecast is calculated
- Explain the corrective actions for adjusting the sales plan

## Lesson 1: Explaining the Customer Planning Process

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the Customer Planning Process

## Lesson 2: Explaining the Planning Setup

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain buyer concept
- Explain the maintenance of buyer targets
- Explain the benefits of creating a planning product hierarchy

## Lesson 3: Explaining the Customer Strategy

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the main activities in building the account strategy
- Explain the customer mission, strategy and development plan

## Lesson 4: Explaining the Baseline Planning

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain usage and maintenance of assortments
- Explain the elements, usage and the maintenance of a baseline plan
- Explain the concept of TU and CU

## Lesson 5: Explaining the Promotion Planning

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain options to populate the customer promotion plan
- Explain how to evaluate customer plan against sales target, funds, KPIs
- Explain how to create and maintain alternative scenarios

## **Lesson 6: Explaining the Customer P&L Plan Approval**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the different types of approval
- Explain the activities generated when approving a plan

## **Lesson 7: Explaining the Operational Plan Execution**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain how the forecast is calculated, adjusted and handled in versions

## Lesson 1: Gaining an Overview About Promotion Planning

### Lesson Objectives

After completing this lesson, you will be able to:

- Gain an overview about promotion planning

## Lesson 2: Explaining Promotion Entry Points

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the methods used by the account manager to build up their promotional plan

## Lesson 3: Explaining Promotion Timing, Products and Tactics

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the essential elements of a promotion

## Lesson 4: Explaining Promotion Volume and Investment

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the planning of the overall promotional volume
- Explain the different trade investments and how to assign it to a promotion

## Lesson 5: Explaining Promotion Optimization

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the overall impact of the promotion on the plan
- Evaluate alternative approaches to run the promotion in order to find the best option

## **Lesson 6: Explaining Promotion Approval**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the promotional approval process
- Explain the impacted and the generated activities, when approving a promotion

## **Lesson 7: Explaining Promotion Monitoring**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the promotional monitoring processes, tools and metrics
- Explain the typical promotion course correcting activities and their impacts



## Lesson 1: Giving an Overview about Execution and Settlement

### Lesson Objectives

After completing this lesson, you will be able to:

- Give an overview of Execution and Settlement

## Lesson 2: Explaining the Order-to Cash Integration

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the generation of discount, contract settlement conditions or rebate conditions from a promotion
- Explain the integration of actual discounts with funds checkbook

## Lesson 3: Explaining the In-Store Preparation

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the necessary In-Store Preparation activities to ensure proper in-store promotion execution

## Lesson 4: Explaining In-Store Tracking

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the In-Store Tracking activities that provide the account manager with visibility into the customer execution of the agreed promotion

## Lesson 5: Explaining Accruals Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the accruals management process for building the accruals for all conditional investments that are based on the performance of the customer in order to prepare for deferred payments

- Explain the different accruals calculation methods and their required information

## **Lesson 6: Explaining Claims and Settlement**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the different proof of performance for validating a customer claim
- Explain the settlement process