

How to use Promotion Benchmark report in effectmanager

This guide shows you how to use the Promotion Benchmark report in the effectmanager Report module.


This guide is only of relevance if you have the online Promotion reports module in effectmanager.



The Promotion Benchmark report provides you with a report in which you can compare two periods on KPI indicator selected in the filter.

You can benchmark on KPIs like Cost-Benefit, Gross Margin, Turnover etc.

All KPIs in this report are shown for the double profit line - you get a report with your and your customer's promotion finance.

 **Pro tip:** The Promotion Benchmark report is a great tool for internal and external reporting. If you export the report to Excel and remove your promotion finance from the reporting on the double profit line, you have a great overview to send or present to your customers showing them a benchmark report on selected KPIs.

Grouping the report will allow you to get in-debt knowledge about which promotion mechanisms are the best for which product groups, chains, or wholesalers.

Groupings can also be very useful if you use the Excel-export as a performance report for your customers. **But remember to delete your financial results from the report!!**

See the difference between the reports on the following pages. They all use the same filters; Wholesaler Coop, period 01/09-2019 to 31/12-2019, benchmark period 01/09-2018 to 31/12-2018, and value Gross Margin but with different groupings.

Reports <<

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Benchmark report

DagligBrugsen

Product Group

Coconut water, Coconut water, Mineral water +, Afmeldte produkter

Total (DagligBrugsen)

Filter >>

Save Clear all

> BASIC

Chain: DagligBrugsen

Category: Not set

Product: Not set

State: Not set

Value: Not set

Period: 09/01/2020 to 12/31/2020

Benchmark period: 09/01/2019 to 12/31/2019

Dynamic period: Not set

> DETAIL

> GROUPING

Level 1: Chain

Level 2: Not set

Level 3: Not set

Exclude: Wholesaler

Grouping on Chain

These filtering options will provide you with a benchmark report showing you the Gross Margin of each promotion segmented into a chain overview compared to the same period the previous year. With these filters, you can focus on the performance of each promotion per chain and see if the results of your promotion have improved.

Chain: COOP; Value: Gross Margin (amount); Period: 09/01/2020 to 12/31/2020; Benchmark period: 09/01/2019 to 12/31/2019; Level 1: Chain; Exclude: Wholesaler

| DagligBrugsen | | | | | | | | | | |
|---|---------------------------|--------------------------------------|--------------------------------------|--------------------|---|---|------------------------|--|--|---------------------|
| Product Group | Mechanism | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| Coconut water, Coconut water, Mineral water +, Afmeldte produkter | Buy 1.00 for Amount 10.00 | 1 | 0 | -1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total (DagligBrugsen) | | 1 | 0 | -1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| Fakta | | | | | | | | | | |
|---|---------------------------|--------------------------------------|--------------------------------------|--------------------|---|---|------------------------|--|--|---------------------|
| Product Group | Mechanism | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| Coconut water, Coconut water, Energy drink | Buy 1.00 for Amount 1.00 | 1 | 0 | -1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Coconut water, Coconut water, Mineral water + | Buy 2.00 for Amount 25.00 | 1 | 0 | -1 | -6,406.80 | 0.00 | 6,406.80 | 14,003.00 | 0.00 | -14,003.00 |
| Mineral water + | Buy 6.00 for Amount 35.00 | 0 | 1 | 1 | 0.00 | -10,000.00 | -10,000.00 | 0.00 | 10,000.00 | 10,000.00 |
| Mineral water +, Coconut water, Afmeldte produkter, Coconut water | Buy 1.00 for Amount 10.00 | 1 | 0 | -1 | 64,623.10 | 0.00 | -64,623.10 | -93,758.00 | 0.00 | 93,758.00 |
| Total (Fakta) | | 3 | 1 | -2 | 58,216.30 | -10,000.00 | -68,216.30 | -79,755.00 | 10,000.00 | 89,755.00 |

| Kivicky | | | | | | | | | | |
|-----------------|---------------------------|--------------------------------------|--------------------------------------|--------------------|---|---|------------------------|--|--|---------------------|
| Product Group | Mechanism | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| Coconut water | Buy 1.00 for Amount 10.00 | 1 | 0 | -1 | 47,193.00 | 0.00 | -47,193.00 | -47,193.00 | 0.00 | 47,193.00 |
| Coconut water | Buy 2.00 for Amount 30.00 | 1 | 0 | -1 | -56,077.20 | 0.00 | 56,077.20 | 61,868.00 | 0.00 | -61,868.00 |
| Coconut water | Buy 2.00 for Amount 35.00 | 2 | 0 | -2 | -5,250.00 | 0.00 | 5,250.00 | 89,250.00 | 0.00 | -89,250.00 |
| Coconut water | Buy 3.00 get 1.00 Free | 1 | 0 | -1 | -45,000.00 | 0.00 | 45,000.00 | 45,000.00 | 0.00 | -45,000.00 |
| Mineral water + | Buy 2.00 for Amount 35.00 | 1 | 0 | -1 | 2,250.00 | 0.00 | -2,250.00 | 33,750.00 | 0.00 | -33,750.00 |
| Mineral water + | Buy 6.00 for Amount 35.00 | 0 | 1 | 1 | 0.00 | -10,000.00 | -10,000.00 | 0.00 | 10,000.00 | 10,000.00 |
| Total (Kivicky) | | 6 | 1 | -5 | -56,884.20 | -10,000.00 | 46,884.20 | 182,675.00 | 10,000.00 | -172,675.00 |

Grouping on Mechanism

These filtering options will provide you with a benchmark report showing you the Gross Margin of each promotion segmented into an overview based on your promotion mechanisms. With these filters, you can compare how your promotion finance across chains compared to the same period the previous year.

This grouping is great for finding out if the performance of your promotions is better or worse than the previous period and helps you select a mechanism for future promotions.

Chain: COOP, Value: Gross Margin (amount); Period: 09/01/2020 to 12/31/2020; Benchmark period: 09/01/2019 to 12/31/2019; Level 1: Mechanism; Exclude: Wholesaler

| Buy 1.00 for Amount 1.00 | | | | | | | | | | |
|-----------------------------------|--|--------------------------------------|--------------------------------------|--------------------|---|---|------------------------|--|--|---------------------|
| Chain | Product Group | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| Fakta | Coconut water, Coconut water, Energy drink | 1 | 0 | -1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total (Buy 1.00 for Amount 1.00) | | 1 | 0 | -1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Buy 1.00 for Amount 10.00 | | | | | | | | | | |
| Chain | Product Group | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| DagligBrugsen | Coconut water, Coconut water, Mineral water +, Afmelde produkter | 1 | 0 | -1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Fakta | Mineral water +, Coconut water, Afmelde produkter, Coconut water | 1 | 0 | -1 | 64,623.10 | 0.00 | -64,623.10 | -93,758.00 | 0.00 | 93,758.00 |
| Kiickly | Coconut water | 1 | 0 | -1 | 47,193.00 | 0.00 | -47,193.00 | -47,193.00 | 0.00 | 47,193.00 |
| Total (Buy 1.00 for Amount 10.00) | | 3 | 0 | -3 | 111,816.10 | 0.00 | 111,816.10 | 140,951.00 | 0.00 | 140,951.00 |
| Buy 1.00 for Amount 15.00 | | | | | | | | | | |
| Chain | Product Group | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| SuperBrugsen | Coconut water | 1 | 0 | -1 | -50,000.00 | 0.00 | 50,000.00 | 50,000.00 | 0.00 | -50,000.00 |
| Total (Buy 1.00 for Amount 15.00) | | 1 | 0 | -1 | -50,000.00 | 0.00 | 50,000.00 | 50,000.00 | 0.00 | -50,000.00 |
| Buy 2.00 for Amount 25.00 | | | | | | | | | | |
| Chain | Product Group | Promotions 9/1/2019 12/31/2019 | Promotions 9/1/2020 12/31/2020 | Promotions Diff | Supplier Total 9/1/2019 12/31/2019 | Supplier Total 9/1/2020 12/31/2020 | Supplier Total Diff | Chain Total 9/1/2019 12/31/2019 | Chain Total 9/1/2020 12/31/2020 | Chain Total Diff |
| Fakta | Coconut water, Coconut water, Mineral water + | 1 | 0 | -1 | -6,406.80 | 0.00 | 6,406.80 | 14,003.00 | 0.00 | -14,003.00 |
| Total (Buy 2.00 for Amount 25.00) | | 1 | 0 | -1 | -6,406.80 | 0.00 | 6,406.80 | 14,003.00 | 0.00 | -14,003.00 |

All Promotion reports can be exported to Excel, PowerPoint, and PDF by pressing the icons at the bottom of the report. You also have the option to Schedule Reports for automatic send-out to yourself, your Key Account Managers or others.

If you need a guide that shows you how to schedule reports in effectmanager, please see our guide [How to schedule a task/report in effectmanager](#)

Below you can download examples of the Benchmark report from effectmanager. The examples use different filtering and grouping options.

[Benchmark report: Gross Margin Chain](#)

[Benchmark report: Cross Margin Mechanism](#)

[Benchmark report: Gross Margin Chain - Excel used for customers](#)