

Phase 1 - Identification & Alignment

LTO Promotion

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	1. Were the LTO/promotion goals and objectives shared?					
	2. Were the right communication needs identified? (content, timing, length, geography)					
	3. Was the communication timing requirements (e.g. when the data has to be available to other partners)) been clearly communicated?					
	4. Were the appropriate data providers, receivers, and users identified?					
Data Standards	5. Were the LTO/promotion data characteristics (type, items, length, timing, geography) clearly defined?					
	6. Was the data defined and organized in a way that makes it easy for your organization to utilize?					
Collaboration Process	7. Were the LTO/promotion goals and objectives defined and agreed to?					
	8. Was a formal process regarding the promotion/LTO management established prior to promotion LTO/promotion?					
	9. Was a defined approach / process for forecasting established?					

Phase 2 - Planning

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	10. Was the initial item forecast shared on the expected timeline?					
	11. Were the manufacturer and distributor requirements (e.g. lead time, capacity, item commitments, ingredient constraints) shared on the expected timelines?					
Data Standards	12. Did the format of the forecast data enable easy use by your organization?					
	13. Did the format of the supplier and distributor requirement data enable easy use by your organization?					
Collaboration Process	14. Were the production, distribution and inventory plans shared with all partners and discussed as needed?					
	15. Was the LTO/Promotion life cycle strategy (run out vs. risk of excess inventory) discussed?					

Phase 3 - Execution

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	16. Were item re-forecasts shared on the expected timeline?					
	17. Was there ongoing visibility and tracking against manufacturer and distributor requirements (e.g. lead time, capacity, item commitments, ingredient constraints)?					
	18. Were current sales POS, inventory balances/locations, and item movement opportunities/costs shared on the expected timelines?					
Data Standards	19. Was their consistency in the the application of the data standards throughout the execution of the LTO/promotion?					
Collaboration Process	20. Were updates to the production, distribution and inventory plans shared on the expected timelines?					



Phase 4 - Analysis & Optimization

Questions		Rarely / Never	Not Consistently	Most of the Time	Always	Remarks
Communication Map	21. Were overall results of LTO/Promotion vs. goals / objectives shared?					
	22. Were performance (actual vs. projected) shared for production, inventories, orders, and delivers?					
Data Standards	23. Were any changes / updates to the data standards implemented based on insights from the LTO/promotions?					
Collaboration Process	24. Were lessons learned and opportunities for improvement shared and discussed by all partners?					
	25. Was specific feedback provided to partners?					