DUKE ANALYTICS

ASK · VERIFY · ACT · EN

Promotion decision brief

A practical worksheet to prepare the decision to renew, change or stop a promotion before examining it with the DUKE Analytics team. Complete it with sales or marketing leadership and the finance lead.

Worksheet for discussion. It performs no automatic calculation. Completing it does not configure, approve or execute any action, and it does not establish that an integration is available for your setup.

01 Objective and scope

· What result should the promotion produce: clear stock, recruit customers, other?
· Which items, channels and period are concerned?
· Which decision must be taken: renew, change or stop?

02 Baseline

· Baseline price per unit, excluding taxes and on a comparable basis.
· Units sold in the baseline period, and what is counted: orders, shipments or invoices.
· Product cost per unit used.

03 Option considered

· Price considered.
· Volume considered, or threshold to reach as calculated and checked by the team.
· Duration and scope of the option.

04 Excluded costs and limits

· Which costs are excluded: campaign, delivery, payment, service, other?
· How are cancellations, returns and stacked discounts treated?
· Which limits remain: unproven demand, non-causal before/after comparison?

05 Approver and owner

· Who approves the option chosen?
· Who implements it, in which tool and with which permissions?
· Who handles exceptions?

06 Measure and review date

· Which measure will judge the result, over which period?
· How will confirmation of the action be kept separate from the commercial result?
· On which date is the review scheduled?