

# Salesforce Trade Promotion Training

*COURSE CONTENT*

## GET IN TOUCH



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## About Multisoft

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Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

## About Course

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Multisoft Systems offers comprehensive Salesforce Trade Promotion Training designed to equip professionals with the skills needed to manage trade promotions efficiently within the Salesforce ecosystem. This course covers the full lifecycle of trade promotions — from strategic planning and budgeting to execution, monitoring, and post-event analysis.

## Module 1: Strategic Planning

- ✓ Review previous year's performance
- ✓ Define the strategy including target sales volume and revenue for the current fiscal year
- ✓ Determine priorities
- ✓ Set objectives
- ✓ Set top-down targets and budgets

## Module 2: Funds Management

- ✓ Allocate budget to cover promotion cost
- ✓ Sponsor promotions which are created to achieve the targets
- ✓ Organize the promotion funds

## Module 3: Account Planning

- ✓ Review account-related data including the baseline of products that are sold without any promotional activity
- ✓ Create account plans
- ✓ Identify products and categories for promotions
- ✓ Monitor account performance and plan promotions for the customer
- ✓ Use and store target data at the respective account level which can be accessed by the user in the Account Plan Profit and Loss (P&L) screen

## Module 4: Promotion Planning

- ✓ Create and plan specific promotions
- ✓ Review the volume, revenue, and cost of all planned promotions in the account plan
- ✓ Review the funds allocated to sponsor the cost of the promotion
- ✓ Negotiate promotion terms with retail partners

## Module 5: Promotion Execution

- ✓ Start promotions
- ✓ Execute tactics like price cuts, displays, and weekly flier placement at retail stores
- ✓ Track and monitor performance
- ✓ Pay retail partners for any tactics executed at their retail stores

## Module 6: Post-Event Analysis

- ✓ Review the actual sales volume and actual cost in the Promotion and Account Plan P&L Sheet
- ✓ Determine promotion success
- ✓ Extract data for the next round of account and promotion planning