Insights Cloud
Precise, real-time, actionable insights for CPGs and retailers

www.pdisoftware.com
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PDI gives retailers and CPGs the data and insights they need to better compete and grow in the convenience retail industry. PDI Insights Cloud makes monitoring business trends, building loyalty, measuring promotions, having the right product assortment, and maximizing profits easy. By building more collaboration between retailers and CPGs using transaction, promotion, and customer data, customers can come to expect more valuable promotions that impact their wallet.
PDI Insights Cloud

Data-driven and AI-powered analytics to improve the effectiveness of your programs and promotions

Advanced analytics and enhanced reporting provide convenience retailers and CPG brands automated insights. Measure ROI and react to trends based on consumer behavior to help refine your program and promotions strategies.

Measure ROI
Advanced Analytics and Enhanced Reporting

React
Actionable Insights and Tactical Decision-Making

Refine
Program and Promotion Effectiveness
PDI Insights Cloud

Gain a competitive edge with on-demand insights that drive data-backed decisions to build customer loyalty and maximize profit.

Using unmatched automations and guided analytical applications, PDI Insights Cloud gives retailers and CPGs precise, real-time, actionable insights to drive ROI. These insights help CPGs react faster to trends so they can refine their merchandising, loyalty and promotion strategies. This empowers convenience retailers and CPG brands to optimize promotions and store assortment by giving them the rapid business intelligence guidance they need to measure and refine store-level merchandising and marketing decisions. PDI Insights Cloud provides access to transaction, price book and shopper data with easy integration, and instant results.

Software and expertise to support your programs and promotions strategies.
Optimize Store-Level Assortment, Merchandising and Marketing Initiatives

Powerful analytics that enable automated insights to make precise decisions and increase vendor collaboration.

Report Builder
Create multi-dimensional reports rapidly

Affinities
Identify correlations to optimize bundles

SQL Interface
User interface to write, save and share custom SQL queries

Activity Measurement
Enhanced analytics to mine shopper and basket data

Assortment
Measure basket value for item sales and incremental purchases bought

Dayparts
Identifies purchase behavior by time of day and day of week

PDI Insights Cloud Applications

Over $100B in receipt-level transaction data

100% T-LOG basket, time, customer, shipment, space, SKUs, PLUs, tender

Powerful analytics that enable automated insights to make precise decisions and increase vendor collaboration.
Create multi-dimensional reports rapidly

Grow your business with the ability to generate insights that go beyond descriptive or explanatory to help predict future behaviors. Use basket-level data to evolve from a product-specific focus to a customer-centric one, allowing for loyalty data to measure your customers’ behavior and make real-time decisions that directly impact the customer experience.

- Quantify lost revenue by zero exceptions and under-performance by store, category, item, and brand
- Measure the revenue lift, full store impact, and return on investment
- Identify the strongest affinities between products by month, time of day and day of week
- Assess how and what various customer segments shop for
- Guided insights in seconds for marketing, merchandising, and operations
The tools and expertise you need to measure effectiveness

- Use drag-and-drop features to reorganize columns - before or after reports run
- Manipulate columns to view data in a meaningful way for your specific business
- Drill-down to specific rows to further analyze sales data dimensions

Within seconds, analyze sales drivers, including average price, sales, units, number of baskets and average items per basket.
Affinities

Identify correlations to optimize bundles

Explore various product pairings in order to find bundling opportunities. Identify which items, brands, or categories are most frequently purchased in unison and have the most ‘unique’ relationships.

- Assess how and what various customer segments shop for during store visits
- Identify the strongest affinities between products by month, time of day and day of week
- Use insights to design and optimize marketing programs
- Anticipate trips and basket spend changes prior to implemented changes

Enhanced collaboration between CPGs and retailers to design and deliver the best promotions to your customers.
Use shopper behavior insights to create the best customer experience by offering competitive promos, bundles and products

Understand your shoppers without requiring loyalty data. Identify full chain basket behavior, including the type, need and spend of your shoppers, as well as what and when they buy, based on their overall behaviors and product choices.

- See average basket size as well as seasonality and peak sale times during the week
- Inform bundling decisions based on shopper purchases and preferences
- Analyze basket size and evaluate bundling efficiency

Bundle favorite staples with new products to successfully introduce them to the market. This adds variety to your offerings to help drive customer loyalty.
Enhanced analytics to mine shopper and basket data

Evaluate the effectiveness of your promotions by measuring growth and changes in customer behavior. This will help you discover the effect your promotions have on other items in and out of the same category.

Optimize campaign adjustments in real-time by measuring impact on basket size from in-store activities such as display changes, promotions and digital campaigns.
Optimize your loyalty and promotions strategy to drive measurable ROI by leveraging enhanced analytics that mine shopper and basket data, providing you with actionable insights.

Your customers' needs change by time of day, week, and month - so should your promotions

Give your customers the products they want at a competitive price by choosing the most relevant and effective promotions.

- Identify the promotions that change shopper behavior
- Examine take rate, source of volume, and impact on category to drive business impact
- Measure the revenue lift, full store impact, and return on investment
- Capitalize on the demand for fresh food with optimal promotional bundles
Measure basket value for item sales and incremental purchases bought

Products are constantly evolving to meet consumer needs and demands, but your shelf space remains the same. Ensure you are stocking the right products at the speed of the industry by optimizing your revenue and basket with the most competitive and relevant product variety. As trends continue to develop and change, providing the right variety is a key to success in your retail stores.

- Evaluate revenue and basket size for any item, brand or attribute
- Quantify incremental dollar change and volume sales for individual items and basket purchases
- Understand the incremental spend for an item, brand or category
- Identify volume thresholds to remove under-performing items
- Use real-time data and guided visualizations to diagnose key problem areas faster

“I was able to gain visibility into the products our customers were purchasing which helped me understand demand.”

- PDI Customer
Make complex distribution decisions quickly, based on revenue and basket value

Have the right store-level assortment and distribution while maximizing full-store impact based upon your customers' real-time shopping behavior.

- Determine product hierarchy results by selecting incremental type
- Analyze product distribution and maximize basket value
- Know which products, brands, categories, or departments bring in the most incremental revenue
- Understand the average customer's basket

Analyze product performance and examine which items add the most value to your stores. Visualize which of your individual items, brands or categories generate the most incremental value.
Dayparts

Identify purchase behavior by time and day of the week

Discover exactly when items are selling so you know what day of the week, and at what time, is best for your business to run promotions. Dayparts helps you stay prepared for and capitalize on peak business hours for any given product.

- Identify actions that drive shopper trips and basket spend
- Automate report scheduling
- Experience seamless insights sharing
- Guided insights in seconds for marketing, merchandising, and operations

Specify your insights to measure by time of day and day of the week.

OPDI
Identify peak and off-peak times for product sales to optimize inventory and prevent out-of-stock items.

Increase customer loyalty and profitability by understanding shopping behavior

- See a sales schedule by selecting a specific product and date range
- Toggle between total dollars and total units
- Use the heat map to understand when customers are most active during the week
- Visualize activity peaks and dips with the alternate line graph
Writing and sharing collaborative queries

SQL editor is an advanced function that lets you run your own queries and explore the data on your own terms. Seamlessly turn data into actionable insights to make decisions quickly, so you can focus your time on your customers and on growing your business. Build better automated, data-driven processes to enrich the customer experience and discover new behavioral patterns.

- Write your SQL query
- Toggle different editor views
- Pull data from the line item and product tables
- Create collaborative queries to share with others on the platform

Make informed decisions with automated SQL queries to create buying opportunities that grow your business.
Translating insights into tactical actions

Implementing changes at your stores with rapidly changing environments can be risky. Whether it is a new product, new display, or a different promotion or bundle, our business intelligence services help you make the right decision, fast. You’ll be able to anticipate, plan, make educated decisions, and minimize risks to your business. Gain deeper customer understanding with behavioral data that tells you what customers do, not what they say, to complement what you might learn through other sources.

Pre-Campaign Insights
Identify target categories, brands, items, time and location opportunities to maximize marketing spend

Post-Campaign Insights
Identify impact on item, brand, category, bundle, sales, measure redemptions, and ROI

Customer Segmentation
Identify audience segments to deliver personalized and contextually relevant communications

Outsource insight and analytic projects to PDI business intelligence professionals
Extend your team and your knowledge with BI as a Service

Whether testing new products, store layouts, or promotions or evaluating the impact of past actions to improve future decisions, learn about shoppers through robust analytics to get the answers you need, uniquely designed for your business.

- Customized analyses
- Test and learn prior to broad implementations
- Estimate potential impact of implementations
- Segment your customers and stores, and identify the reason for your customers’ trips
- Price optimization and elasticity

Cost-efficient insight packages for vendors, brokers and distributors with limited time or resources.
Enterprise Software Reimagined

PDI helps convenience store retailers, and petroleum wholesale marketers and carriers to thrive in a digital economy with enterprise management software. Over 1,500 customers operating more than 200,000 locations trust PDI to optimize their entire operations whether they are a single site, multi-site, or a franchisee operator. PDI’s enterprise software, wholesale and logistics management software solutions, and retail back office systems have been designed around the evolving needs of customers for more than 35 years. We reimagine enterprise management to help our customers transform their business and deliver exceptional experiences.