

Perfect Store Model



Retail Gamification



Continuous Improvement



Executive Summary

- CPG companies struggle to execute at retail (Brick & Mortar)
 - *Executing strategic activities drives sustainable sales volume*
 - *80% are “not satisfied” with their ability to execute in store (POI)*
- GreatVines is launching **RUNRETAIL** to fill this gap
 - *Uniquely positioned with Proven Retail Sales Execution methodology*
 - *Native Salesforce solution delivered via Salesforce Appexchange*
- *Have a product and reference client*
 - *Eager to begin working with retail cpg teams at SF*
 - *Selling without licenses, not competing (Geopointe model)*

Business Need

Performing well at Retail Sales Execution is mission critical to CPG company success.

Companies need a solution to strategically Plan, Execute and Measure RSX with precision and scale to maximize sales and profits.

"It doesn't matter how good your product is, how well you execute at retail will ultimately determine your success."

"The most successful brands are the ones that best execute their strategic retail activities with precision and scale."

"In order to build or steal market share, companies must execute better than their competition at retail."

Problem

**80% of CPG companies are “not satisfied”
with their ability to execute.***

- Difficulty gathering and analyzing in store market observations
- Poor roadmap for field sales to execute against
- Limited ROI analysis of KPI execution vs sales
- Inefficient and non-strategic application of resources
- Sales and marketing not aligned against strategic execution imperatives

Why?

- Lack of affordable, turnkey/easily implemented solutions
- ERP and custom builds are expensive, unwieldy and lack key functionality/methodology

Resulting in...

- Sub-optimal performance and sales
- Rewarding field sales for the wrong things (leading v lagging indicators)
- Wasted IT, sales administration & field sales resources

Solution

RUNRETAIL

Execute your Strategy at Retail with Precision and Scale



- **Proven Methodology**

- Built specifically for Retail Sales Execution
- Gamification/Scoring Model drives adoption and motivation

- **Built on the Salesforce Platform**

- Marketed as add-on app on Salesforce AppExchange
- Complementary to the Salesforce suite of products

Tablet/Browser Examples

Hideout Lounge Account Details  

gle **Facebook**

DBA:
The Hideout

Type:
On-Premise

Primary Contact:
Ron Fleming

3

n: Territory:
IN

Accounts **Calendar** **Dashboard**

Account Visit

New Photo

Survey

Sales Order

Objectives 

NEXT 90 DAYS

Get Griffin Bay Gin on backbar and menu (Gr...

Contacts 

Ally McBeal (Bartender)

Cindy Sorenson (Owner)

Ron Fleming (Chief Buyer)

David Johnson (General Manager)

My Tasks 

OVERDUE

Account Review

Hideout Lounge - Everyday On-prem Survey   

Backbar **Menu** **Wine List** **Beer**

Quality of Drinks  **--None--**  Total # Drinks on Menu 

CLOUD RUM SILVER

Menu Listings Approved Recipe? ☐ Yes ☐ No Feature Price

Bottlemart Ranging

Winter Reds **Summer Whites**

Hideout Lounge - Everyday On-prem Survey  **Backbar** **Menu** **Wine List** **Beer**

Quality of Drinks  **--None--**  Total # Drinks on Menu

CLOUD RUM SILVER

GRIFFIN BAY GIN

Approved Recipe? ☐ Yes ☒ No

Custom Signature Cocktails

Classic Cocktails

Basic Mixed Drinks

Beer & Wine Focus

Abbey Liquors - Off-premise CA Display    

Vodka **Display** **Account Info**

Cloud Rum Does Jack Daniels have any neon signs?

Griffin Bay Does Jack Daniels have any neon signs?

Absolut Does Jack Daniels have any neon signs?

Grey Goose Does Jack Daniels have any neon signs?

750 ml **1 liter**

Feature Price **In Cold Box** **Feature Price** **In Cold Box**

ARGENTINE MALBEC ☐ Yes ☐ No ☐ Yes ☐ No

CLOUD RUM SILVER ☐ Yes ☐ No ☐ Yes ☐ No

GRIFFIN BAY GIN ☐ Yes ☐ No ☐ Yes ☐ No

GRIFFIN BAY TEQUILA ☐ Yes ☐ No ☐ Yes ☐ No

Home **Accounts** **Calendar** **Dashboard**

Embedded Custom Application

Phone Examples

AVILA'S - Survey Summary Finish Survey

Points scored

55 110

Objectives completed (0)

The following questions were not on target. Please create objectives as appropriate.

Summary Email Yes No

Menu - Score: 55/109

Question Text	On Cocktail Menu?
Sales Driver	Menu
Full Product Description	Cloud Rum Silver
Target Answer	Yes
Points	25
Objectives	New

Analyze Score and Target Answers

Objective - Edit

Account
 ✕ 📷 ➡

Brand
 ✕

Owner
 ✕

Label
 ✕

Accomplish by

Priority
 ▼

Description

Cancel Delete Save ✓

Create Objectives to Improve Scores

New Photo



⚙️ Take A Photo

📷 Choose Existing

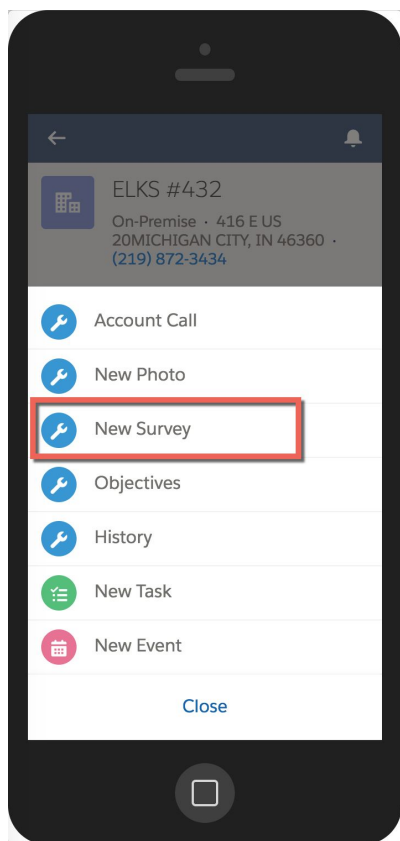
Brand
 ✕

Type
 ▼

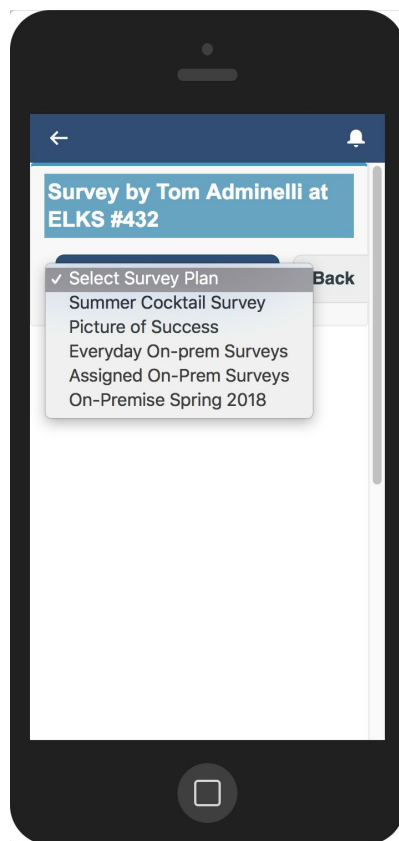
Cancel Save

Capture Photos to Validate Improvement

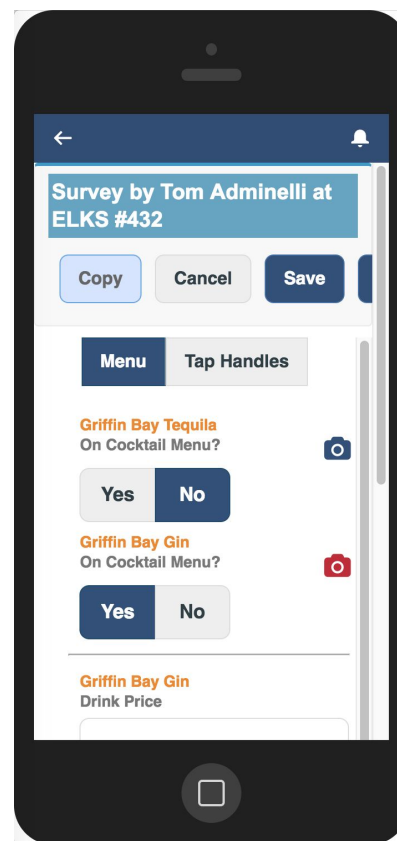
Salesforce Mobile Example



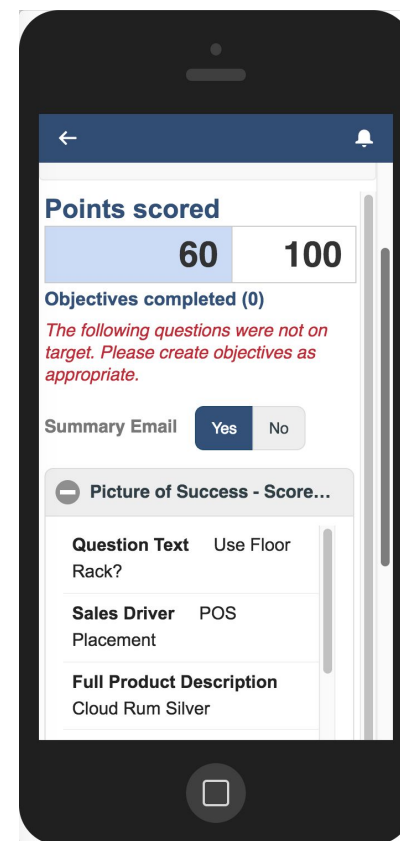
**Account Quick
Actions**



**Surveys by
Type/Segment**

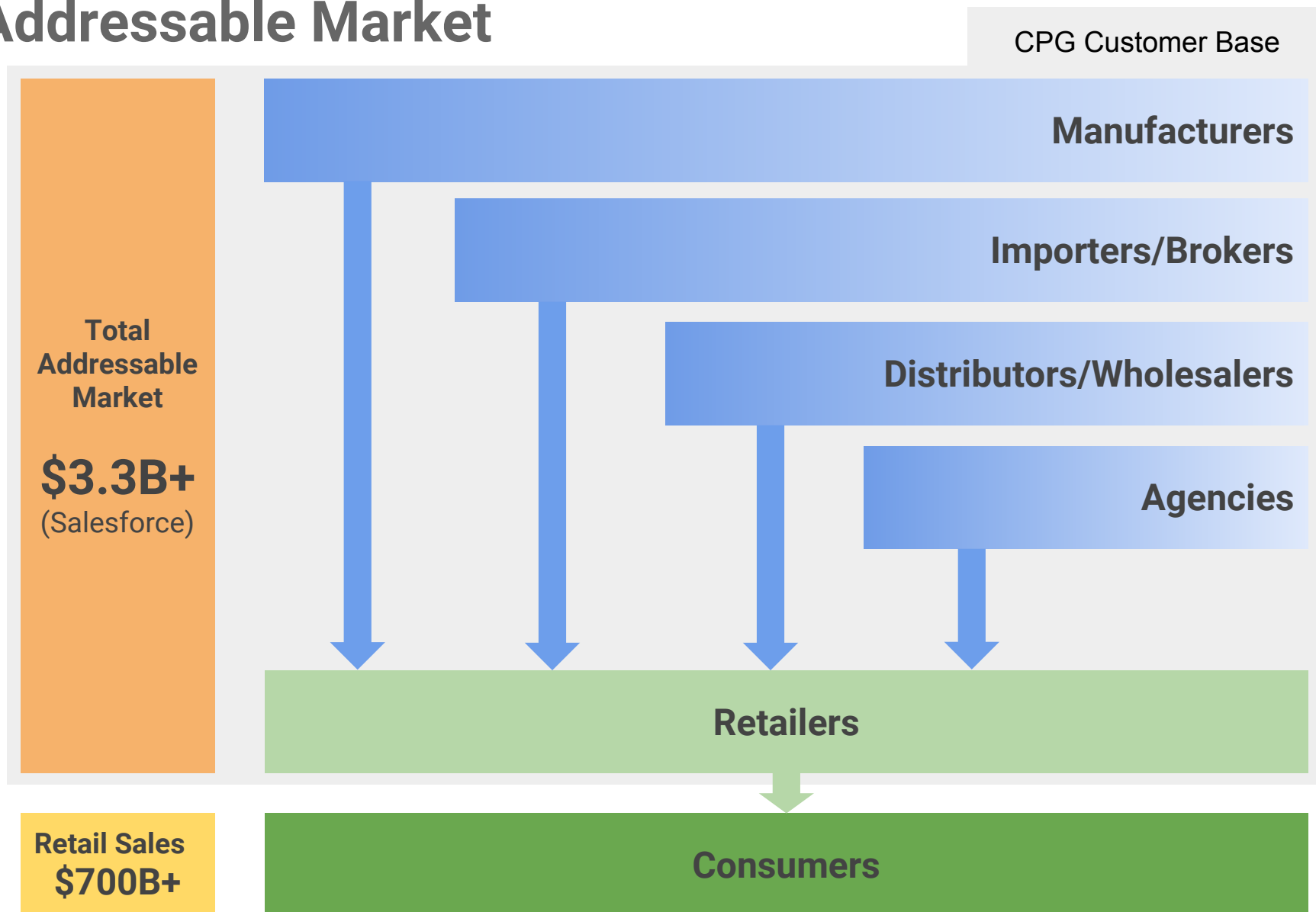


**Simple but
Powerful Surveys**



**Analyze Survey
Scores**

Addressable Market



Business Need

CPG companies need a solution to plan, execute and measure their sales activities at retail to maximize their performance and resources.

Vendor Panorama for Retail Execution and Monitoring in Consumer Goods



Introduction

Regardless of the route to market, consumer goods companies and their distribution partners must be able to execute at the individual store level because if the product is not available, merchandized correctly, and promoted effectively, the consumer will likely purchase from a competitor. Despite efforts to improve in-store execution over many decades, success remains rather elusive. Consumer goods companies themselves continue to tell us that they are not satisfied with their ability to execute at the store level. In the 2016 Promotion Optimization Institute TPx and Retail Execution Survey, we found that only 20% of respondents said that they were satisfied with their ability to execute at the store level, with another 48% saying that they were only somewhat satisfied. In 2017, however, the percentage that are satisfied dropped by 1 percentage point while those that are somewhat satisfied dropped by 3. This is not necessarily alarming, but we are always working towards improvement as an industry, though we have not yet watched it broaden significantly.

Non Salesforce Competitor Example

GoSpotCheck

Total Funding Amount

\$47.5M



Mobile Data Collection

Turn time-consuming surveys and audits into instant, actionable information.



Field-First CRM

Keep up-to-date account information that is accessible on-the-go.



Photo Capture & Analytics

Get a glimpse into the market. Capture photos to provide powerful context.



Field Team Management

Provide mobile team management tools for your modern team.



Content Distribution

Share knowledge within your team. Easily send the right info to the right people.



Alerts & Follow-Ups

Improve your field execution with automated updates & follow up actions.



Reporting

Develop a 30,000-foot view of your business with streamlined charts & graphs.



API/Integration Ready

Integrate data sources by using our flexible API —designed to play well with others.



Product Tour

Explore key features of the platform through a self-guided tour.

How do we know our RSX solution works?

RSX is a core module within the current GreatVines - Beverage Selling Solution

7 of the 10 largest global spirits suppliers are leveraging GreatVines RSX module to drive their retail execution strategy

The 2nd largest wine & spirits wholesaler in the US (Republic National Distributing) uses GreatVines RSX module across their entire 5,000+ person sales team

On average, licenses per customer have grown over 300% from initial sale, driven in large part by ROI from the RSX module

A 3 year Bain Consulting project used GreatVines RSX module to align 50 top liquor brand KPIs with Distributor retail sales execution across key markets, resulting in significant growth vs control accounts in every market