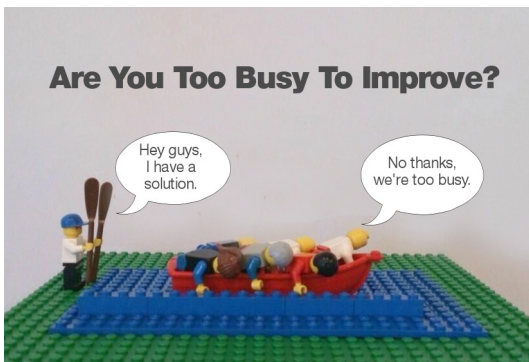


# Driving Sales and Trade Marketing Success in the Global Beverage Industry

How Enterprise Software  
Is Making a Difference





The time has arrived for the beverage alcohol industry to follow the well-worn path toward sales and marketing automation which has successfully resulted in increased efficiencies and profits for many other industries over recent years. With the increased adoption and use of technologies in our everyday lives, workers today are more willing and able to embrace new

tech solutions to vexing business challenges. The beverage alcohol industry is particularly “ripe” for technology boost. This paper examines the challenges facing beverage alcohol companies in managing their complex sales and trade marketing processes. It will make the case that technology now exists to fully automate these processes yielding significant operational and bottom line benefits for producers and suppliers of beer, wine and spirits.

## Challenges Facing Suppliers Using Manual Processes

### No Data Standardization

Despite advances in software solutions to automate business processes of all kinds, the majority of beverage alcohol suppliers (“suppliers”) do not yet have any such solution implemented. Most still rely on a system of rudimentary spreadsheets, passed back and forth between management and sales teams in the field. This process is inefficient and prone to data loss, corruption, and/or error. Despite the best efforts of all users, the lack of standardization means information from the field isn’t being entirely or accurately reported to management for accurate interpretation and well-informed planning.

### Poor Visibility into Performance

The lack of data standardization hampers suppliers’ ability to draw sound, evidence-based conclusions about where sales efforts excel and where they lag. This is particularly evident in the management of Leading Indicators - the activities that drive your sales. As a result, there are significant efficiencies being obscured and poor performances being masked. Opportunities to promote winning strategies (and abandon losing ones) are being missed with regularity. Worse, awareness of the lack of visibility into performance is diminished by the false sense of security that comes from over-reliance on anecdotal evidence and tribal knowledge. Focusing on top line analysis of lagging indicators (depletions) is the norm in the industry because there exists a major lack of visibility into the leading indicators around sound sales execution.

### Limited Awareness of the Problem

That false sense of security is often reinforced by the level of success a supplier may enjoy even in the absence of a sales automation solution. However, even profitable, top-producing suppliers leave significant money on the table if they don’t have complete visibility and control over their sales

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*“... technology now exists to fully automate these processes yielding significant operational and bottom line benefits for producers and suppliers of beer, wine and spirits.”*

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and marketing efforts. In a competitive industry like beverage alcohol, any opportunity to gain competitive advantage must be closely examined.

### Ambiguity Surrounding Suppliers' vs. Distributors' Responsibilities

Without any centralized means for recording activities and results, suppliers may be inclined to lean on their distributors, relying on distributors to perform tasks suppliers should be doing themselves. While distributors may be tacitly willing to aid in this fashion, no full accountability exists (or is even implied) in this arrangement, and it is a risk for suppliers to leave any portion of their business to the whims of third parties no matter how well intentioned. To realize the full potential of their brands, suppliers must adopt a hands on approach to field sales execution.

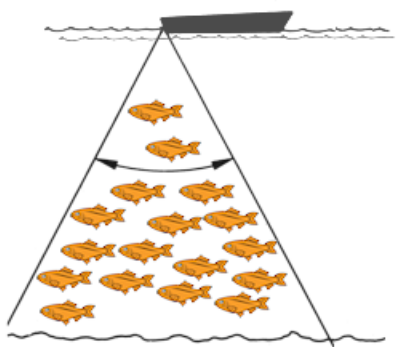
This is why suppliers are now beginning to take a critical look at enterprise sales software to optimize their own sales efforts and achieve solid competitive advantage. Yet, the prospect of applying a sweeping new technology solution to existing operations may be daunting for some. What follows is an examination of how leading, contemporary beverage alcohol sales software solutions derive value across four critical success factors – or “key sales levers” for this industry.

### Key Sales Levers for the Beverage Alcohol Industry

There are four key sales levers a company must successfully manipulate to successfully sell their products in the beverage alcohol industry in the U.S. These are:

- Key Account Identification
- Distribution Strategy
- Account Activation & Brand Visibility
- Trade Marketing Efficiency

The simple fishing analogy illustrations below depict the utility of each sales lever (with customers represented as fish).



**Key Account Identification** is all about figuring out what (or who) to fish for.

Efforts spent marketing and selling into low value accounts (accounts that don't elevate visibility to the target consumer or deliver significant volume) are not efficient. There are hundreds of thousands of potential accounts to sell in to, and it is easy for a sales person to get distracted. Identifying and focusing on the right accounts leads

to improved sales volumes. Moreover, sales reps will grow frustrated if their efforts don't return good sales results, which means it is critical for them to focus on “catching the right fish”.

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*“In a competitive industry like beverage alcohol, any opportunity to gain competitive advantage must be closely examined.”*

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**Distribution Strategy** is akin to fishing where the fish are.

Time is valuable so you only want to visit the most appropriate accounts to sell your products. Consumers buy products that are easy for them to get. If your product is not sold in the account they frequent, then you lose the sale. Gaining distribution in the right accounts is the key. To do so, suppliers must segment the account universe and target the right accounts for distribution of their products. Every product and representative should have distribution goals and Key Performance Indicators (KPI's) aligned with their key accounts and segments. One of the best KPI's is addressed by the "Percentage of Key Accounts Sold" metric.



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**Account Activation & Brand Visibility** is like selecting the right bait.

Just having distribution in an account is not going to get your product sales. Beverage alcohol is a very competitive landscape with many products available to consumers who are drawn to the products featured in the accounts they frequent. Your products will not realize their fair share

of sales unless they are promoted and have good visibility within the right accounts. In fact, securing the right promotion in an account can deliver far more than one's fair share of the business, delivering a tremendous advantage over even market leading brands. Having high visibility in a key account is the best advertising you can have. If a supplier is focused only on distribution, they will likely not sell as much as a supplier who engages in distribution supported by product feature efforts.

**Trade Marketing Efficiency** is reeling in a customer once the "fish" is hooked.

Given the amount of products competing for consumer attention and the finite pool of accounts, suppliers must hold onto customers once interest has been cultivated. Failure to follow up with relevant marketing to key accounts will result in accounts lost to other products which succeed in garnering customer attention. In order to maintain and build on success in an account, you must connect with customers regularly to earn and enjoy their loyalty.



**A Proven Comprehensive Sales & Marketing Approach**

In a broad sense, the argument in favor of software to automate business processes is the same as it is for tools designed for other industries. At every step of the process, a software solution delivers the infrastructure to support



a comprehensive approach to business challenges. This proven approach can



be characterized as Plan-Execute-Measure-Refine (“PEMR”):

A best-in-class technology provides a public or private cloudweb-based application enabling enterprise-wide process standardization, accessible by all users on desktop or mobile device regardless of location. In this way, all users work with a singular purpose and each role within the organization is provided with access to the information needed to plan actions, execute with accountability, measure results against educated benchmarks and then refine their plans based on empirical evidence.

More specific to the beverage alcohol industry, a best-in-class technology provides highly specialized functionality designed to apply the PEMR approach to industry-specific tasks associated with the four critical success factors for beverage alcohol as discussed in the earlier fishing analogy.

A solution like GreatVines, developed explicitly as a software platform to automate and manage sales and trade marketing for beverage alcohol suppliers, addresses each critical success factor. It delivers the tools and processes required to yield the greatest results in the most efficient and effective manner possible.

### Key Account Identification Solution from GreatVines

This facet of the application incorporates every account in the saleable universe from any of the industry data providers into a central, online repository, dramatically reducing the amount of time that sales reps spend manually adding accounts themselves.

Sales reps may plan by simply searching for the account(s) they want to view and assigning segmentation and key account ratings. The time saved may be used to plan appropriate objectives or standards for a supplier’s products in each segment, ensuring they are focused on the right accounts and the right activities.

The tool allows for measured and replicable execution with volume and activity goals and product specific objectives established by segment.

Reviewing the results post-execution is made simple via GreatVines’ state of the art reporting and dashboard features which are designed to highlight and analyze KPI’s and can be filtered to show results and opportunities in key

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accounts by segment.

With this data visibility, management can refine their original plans, and sales reps can hone in on the best opportunities.

#### GreatVines Key Account Identification Features:

- Customizable segmentation
- Key account identification
- Search and filter accounts by segment
- Reports & dashboards
  - Filtered by key account & segment
  - Results vs. goals
  - Scorecards
  - Accounts requiring attention
  - Won/lost account specific objectives

#### Distribution Management Strategy from GreatVines

GreatVines distribution management solution helps companies execute supply strategies by providing a friendly interface for users to plan, execute and measure their efforts with distributors. The robust feature set includes functionality to support both internal and distributor management functions as described here:

##### Internal Management Functions

- Account segmentation
- Key account identification & targeting
- Account sold goals
- Account calls (via mobile app)
- Calendar & scheduling
- Content delivery/presentation
- Account order commitments
- Surveys
- Reports & dashboards
  - Distribution scorecard vs. goals
  - Unsold account reports
  - Accounts sold/not sold reports
  - Depletion reports and dashboards
  - Shipment and inventory reports

##### Distributor Management Functions

- Distributor meetings
- Distributor programs, budgets & spends
- Logged call email recaps sent to distributor
- Account order commitment notifications and reports sent to distributor
- Sales rep CRM - direct email marketing
- Work with recaps & recap emails
- By rep account sold analysis
- Account sold and points of distribution goals

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*“... management can count on the fact that if sales personnel execute activities according to the plan, predictable volume will be achieved.”*

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- Distribution scorecards

## Account Activation & Brand Visibility Using GreatVines

GreatVines enables supplier companies to clearly state goals and KPIs against any strategic activities that drive sales, thus providing a roadmap for sales reps to execute. Each product can be assigned a unique composition and schedule of activities (by account segment) for planning, execution and measurement. Once a winning formula has been identified, management can count on the fact that if sales personnel execute activities according to the plan, predictable volume will be achieved.

GreatVines Account Activation & Visibility features include:

- Activity goals
- Account objectives
- Account calls
- Calendar and schedule
- Account contacts - direct email marketing
- Cocktail menus
- By the glass
- Tap handles
- Wine lists
- Well pours
- POS placements/merchandising
- Displays
- Retail ads & catalogs
- Staff trainings
- National account mandates
- Logged call email summaries to email distributors
- Surveys
- Survey scoring & tracking over time
- Objective creating from off target survey answers
- Complete activity reports & dashboards
- Actual activities vs. goals
- Scorecards
- Activities vs. sales by account

## Trade Marketing Efficiency with GreatVines

Perhaps the most capital intensive portion of the sales and marketing process other than human resources, Trade Marketing represents the greatest potential for inefficient spending. With a solution like GreatVines, suppliers can make sure every key account has at least one contact in the system with respective contact details including the role each contact plays within the account. This opens the door for proper strategic communications to be delivered to the key trade influencers.

The tool allows setting up custom email templates to send to account contacts after a visit or promotion. It also supports effective email marketing campaigns that communicate such messages as new drink recipes, positive press, educational materials or invitations to hosted trade events.

GreatVines solution enables the tracking of contact “click-throughs” and other

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responses to email marketing, measuring the adornment of your products by key influencers.

GreatVines' Trade Marketing Toolkit Features:

- Contacts & roles
- Goals for # of contacts
- Email marketing
- Deliverable content
- Reports & dashboards
- Program cost vs. sales

## Conclusion

As noted at the start of this paper, enterprise software has been applied successfully to many disparate industries. Beverage alcohol is a newer adopter of such tools and the market of providers is not as mature and entrenched as may be the case in other trades. It is fair to say that there is no one solution available that has earned the status as the industry standard for Beverage Alcohol sales and trade marketing automation. There are however a number of respected players in this growing niche; GreatVines well among them. Of all the solutions available, only GreatVines offers the comprehensive functionality required to execute the PEMR model and comprehensively manage leading and lagging indicators.

The success of GreatVines' solution is driven in part by its pedigree. GreatVines is built atop technical architecture provided by Salesforce, a market leader in sales and marketing automation for every industry. GreatVines success is also driven to a greater extent by visionary leadership from beverage alcohol industry veterans and cutting edge technology developers. This has succeeded in harnessing the enormous power of proven technology and – applying significant modifications addressing the unique and industry-specific challenges of Beverage Alcohol – fielded a highly competitive, market-leading offering.

Compared to the competing solutions for beverage alcohol sales and trade marketing management, GreatVines has earned a reputation for both effectiveness and easy usability while being the most comprehensive solution available. Most critically, unlike some competitors whose solutions are intended for the largest volume suppliers or the smallest boutique producers, GreatVines has developed a solution that can be scaled for any size producer.

The time is right to apply automation technology to sales and trade marketing management for Beverage Alcohol suppliers and the tools have achieved a profound level of maturity. Perform your due diligence in your search for technology to help build the competitive advantage your brand deserves.

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## About GreatVines

GreatVines is a privately held company with a strong team of implementation consultants, advanced software developers and subject matter experts.

GreatVines, LLC is based in Portland, Oregon, with team members in Los Angeles, Northern California (Napa) and New York. Since no software is required to install, GreatVines is able to work with producers and distributors worldwide!

GreatVines aims to provide superior software solutions for producers and distributors of wine, spirits and beer. The team's focus is constant innovation, leveraging the best technology available. As a Force.com ISV partner (Independent Software Vendor) of Salesforce.com (NYSE:CRM), GreatVines is able to leverage the technological strengths of the Force.com platform while applying its industry expertise to develop specific application features and functionality unique to the Beverage industry.

[www.greatvines.com](http://www.greatvines.com)

888.547.4505

