

# POI Global Promotion Optimization Summit



*Big Data*  
*Pricing TPO*  
*Retail Execution*  
*Mobility TPM*

## The State of Mobile Analytics for End-to-End Success

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VP, Customer & Partner Solutions  
Spring Mobile Solutions



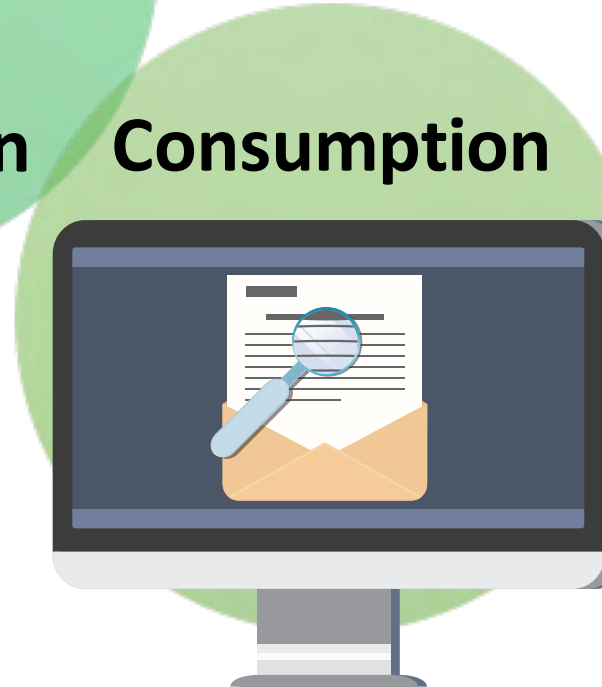
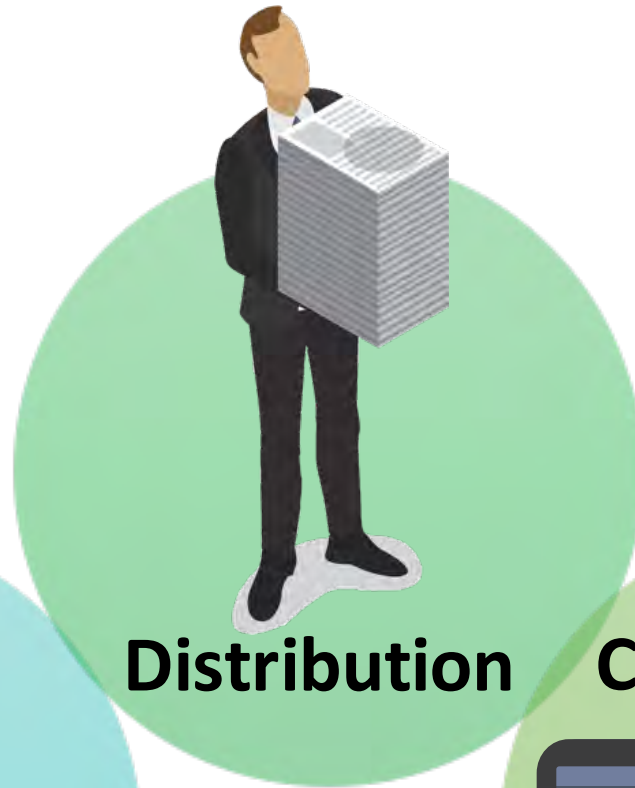
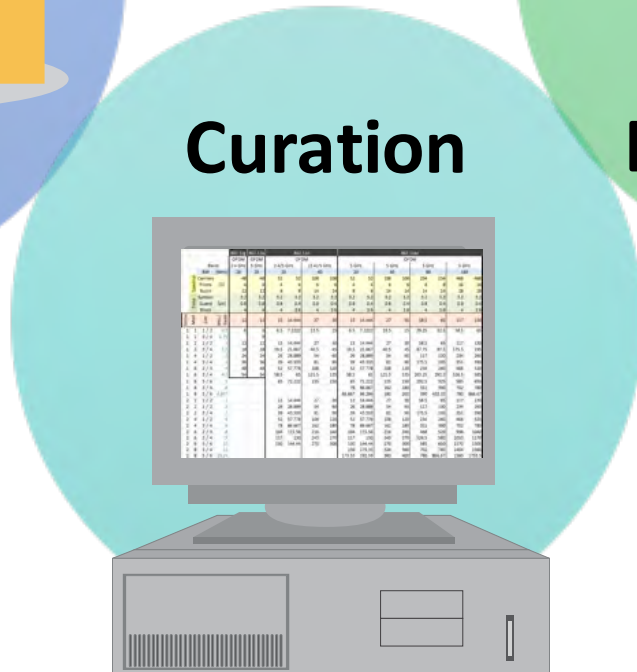


# There's no shortage of data!





...but most data management practices are outdated.





Current **field data collection** methods aren't as efficient as possible and don't provide access to valuable data & reports.







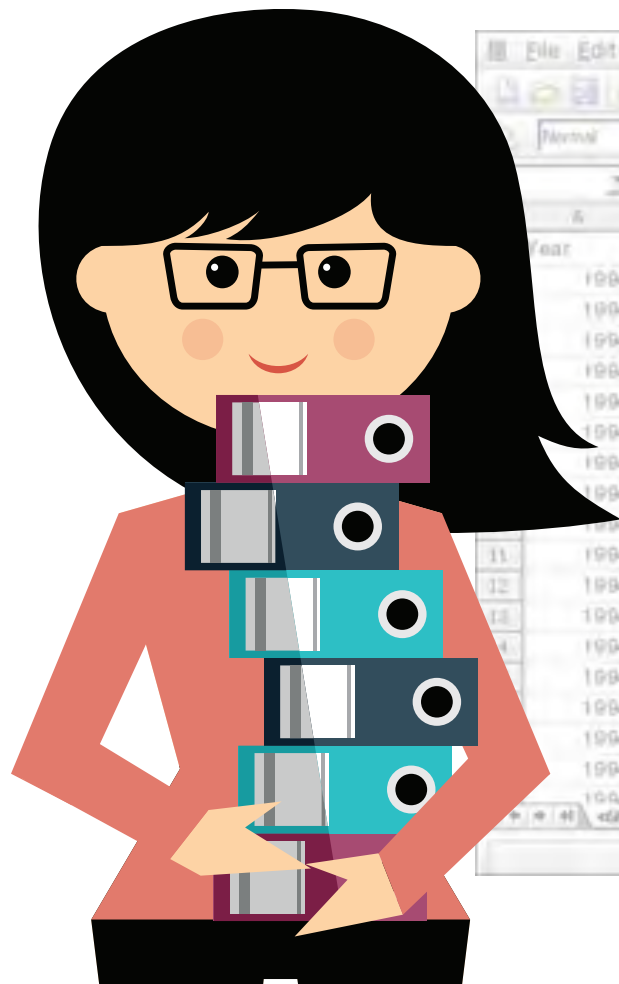
**Curating data** is a manual and time-consuming process.





# Data is still distributed using

**out-dated methods** such as spreadsheets via email and shared servers. Only limited data is available using BI tools.

A screenshot of a spreadsheet application window. The window title is 'File Edit View Format Insert Table Object Tools Window Help'. The spreadsheet contains a table with columns labeled 'Year', 'Month', 'Day', 'US1', 'US2', 'US3', 'RG1', 'RG2', 'RG3', 'RG4', and 'RG5'. The data rows show values for the year 1994 across various months and days. A large blue envelope icon is overlaid on the bottom right of the spreadsheet, and a smaller white envelope icon with a blue arrow is overlaid on the bottom right of the entire image.

**Consuming the data** is challenging, with managers spending hours searching for and compiling required information to make sense of it.





...resulting in wasted time & money.





So what do we do about it?

- There's no quick fix.
- **It's all about making your data easy to use and understand!**





So what do we do about it?

Create a roadmap  
and take small  
steps...





# CASE STUDY

## Renato Piai

IS Product Manager Big Data & Analytics



Deployed Spring's mobileRetail solution in Brazil

Migrated from a completely paper-based process

Implemented in 16 weeks

900+ users and growing

324 thousand visits/year







RB started with a **long-term vision** and **defined a phased approach**.



**1**

**Automate** the process, **enrich the data** being collected & **begin to leverage data**

**2**

Begin **connecting** retail execution data to external systems & expand field communications

**3**

**Actionable Insights** - Automatically take action based on data

**4**

**Test & Learn** - Use data to test, learn & improve

**5**

**Predict issues** and **proactively** take action

The RB logo, consisting of the lowercase letters 'rb' in white, set against a pink, triangular background that points downwards.



## STEP 1: Fix the fundamental issues

**No timely communications** between management and the field

**Low productivity** due to manual, pen-and-paper processes

**Inefficient data consolidation processes** being performed in spreadsheets

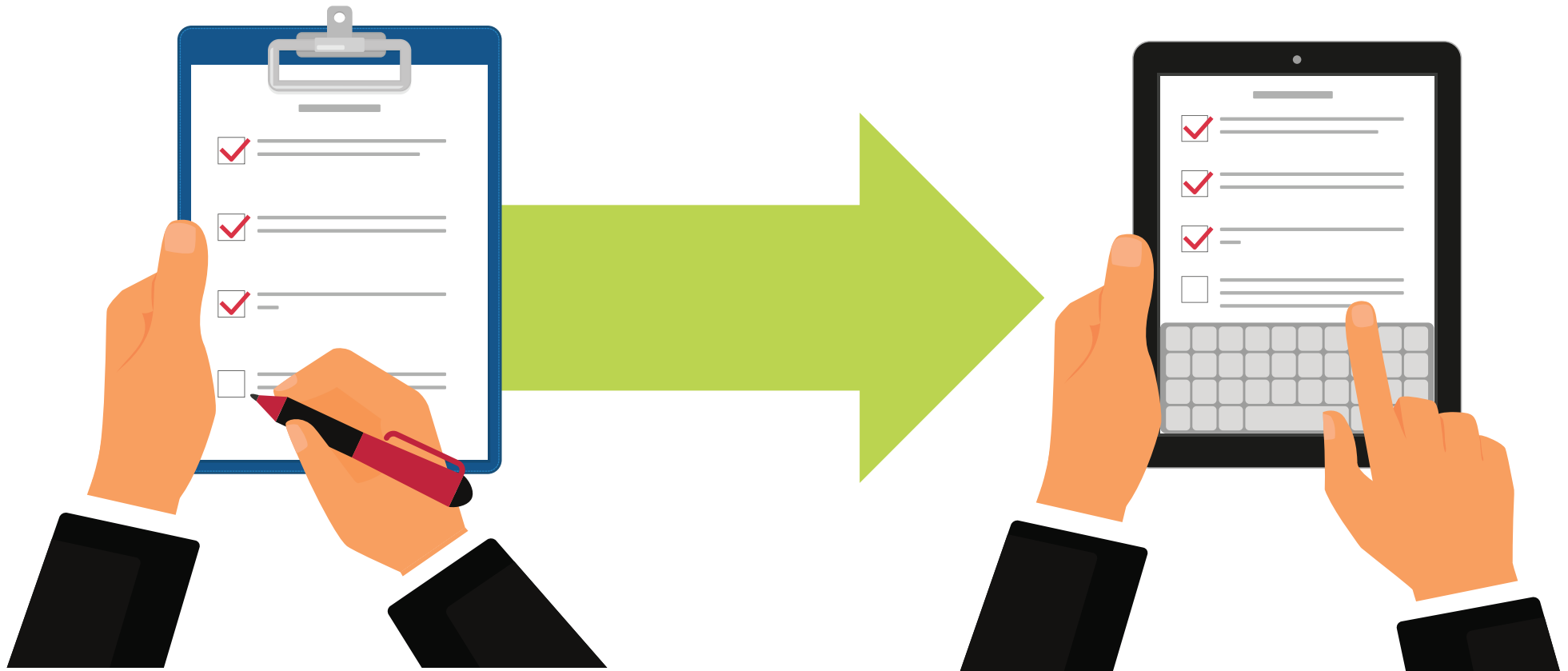
**Lack of insight** was leading to **out-of-stock** situations

Only **limited data** was being collected in the field on a weekly basis

The logo for 'rb' is located in the bottom right corner. It consists of the letters 'r' and 'b' in a white, lowercase, sans-serif font, set against a dark red, stylized background that resembles a triangle or a flag.



RB implemented Spring's mobile **Retail** application to **replace their paper process.**



This **eliminated data entry errors** & lost paperwork and enabled them to **enforce best practices.**





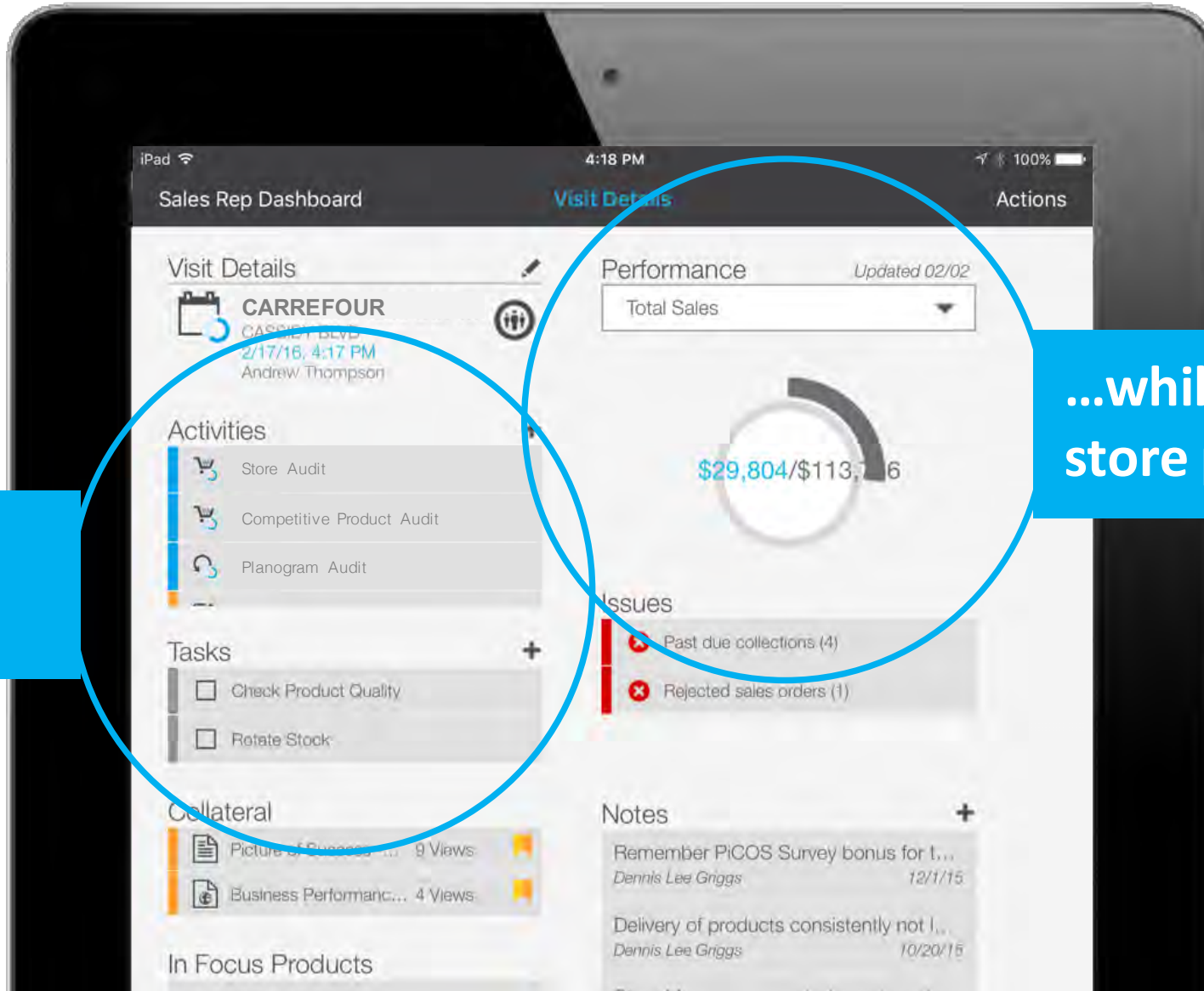


RB began collecting more robust data in the field, including **dynamic audit surveys** they could publish & start to get results on demand.





Instead of doing just one task per outlet, they can now **do more thorough and meaningful merchandising...**



...while having access to store performance data.





RB replaced two data consolidators with one data analyst to **improve strategic decisions & increase their number of Vision Stores.**

Implemented contests with a target

Reps can't achieve commissions without achieving their goals

Top 3 reps get extra bonuses

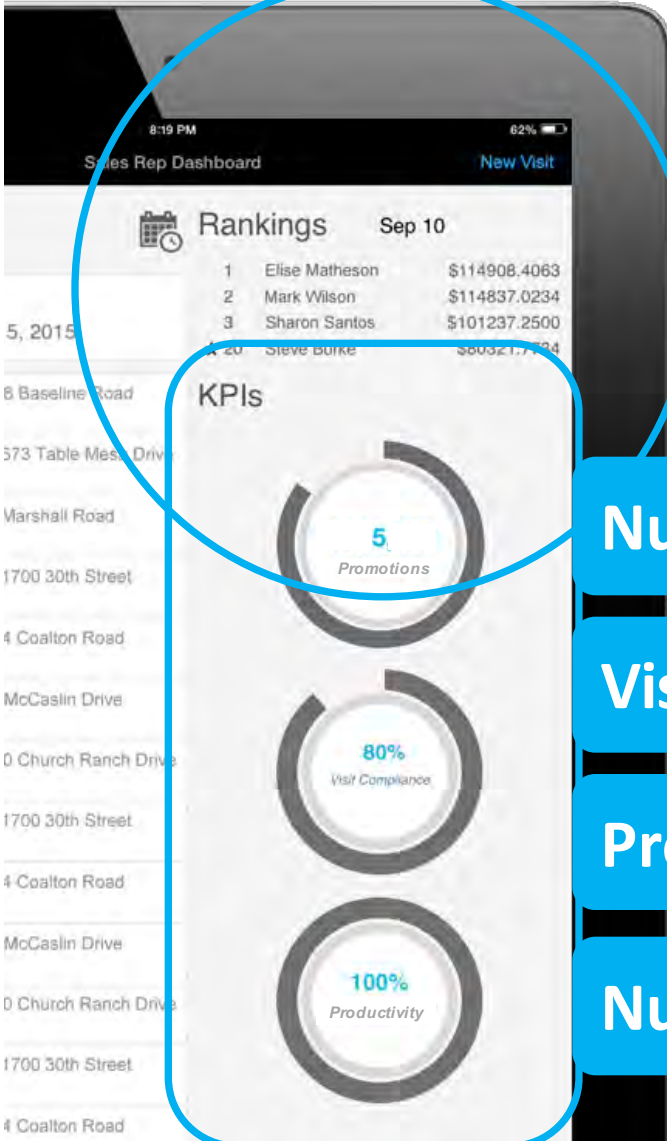
Data is now automatically stored in data cubes

The logo for 'rb' is located in the bottom right corner. It consists of the lowercase letters 'rb' in a white, sans-serif font, set against a dark red, triangular background that points towards the top right.





RB leveraged data to provide field merchandisers with **real-time status of their personal KPIs**, driving perfect store compliance.



Reps always know whether they have achieved 'Top 3' status for their bonus

Number of Promotions Implemented

Visit Compliance

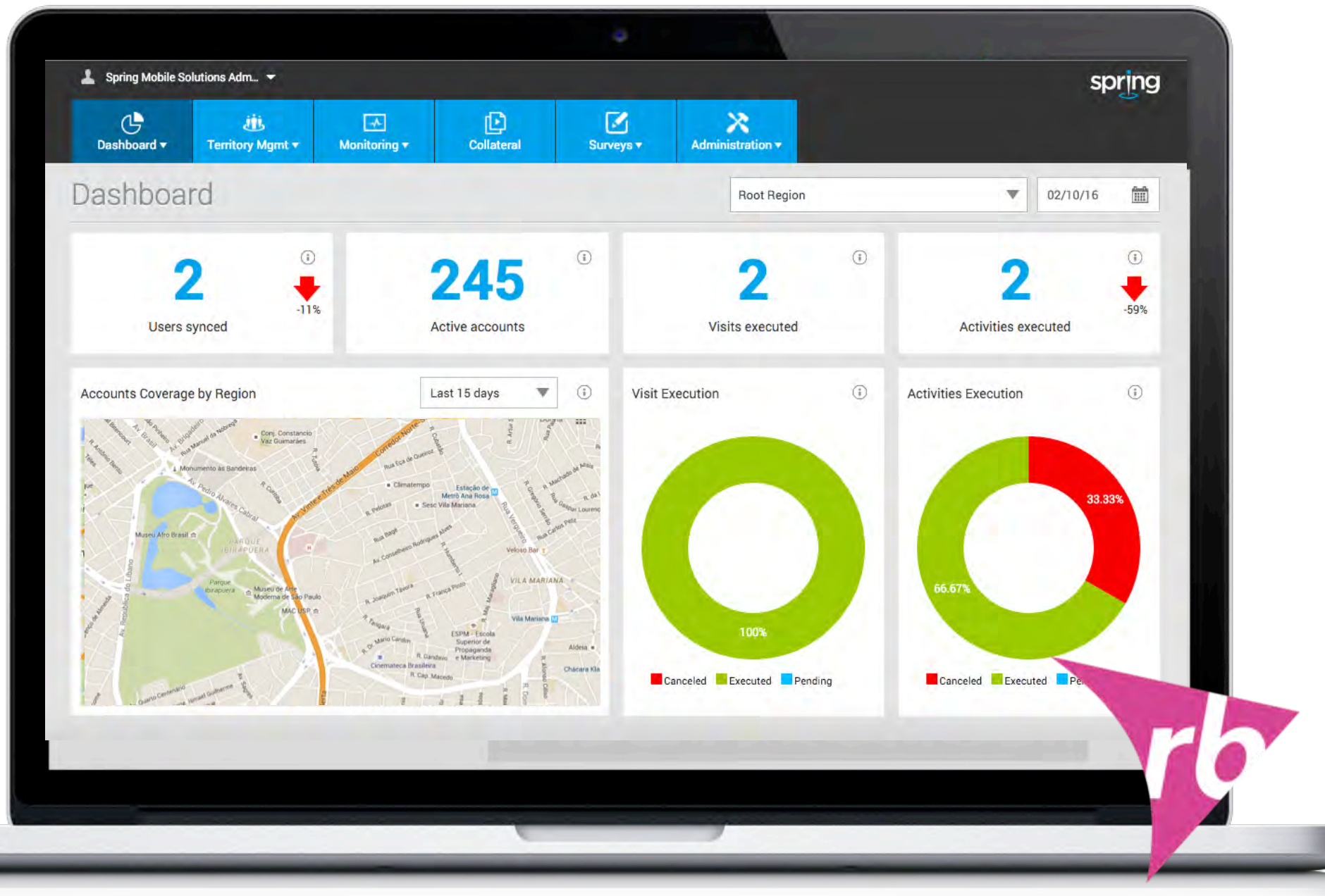
Productivity

Number of Vision Stores





Managers got dashboards to gain insight into their teams' daily activities.





“We gained visibility into data required to **optimize operations** and **identify growth opportunities.**”

When critical stores have performance issues, they can now shift resources so top-performing merchandisers are servicing those stores.

They can identify which merchandisers should be coaching low performers.







Data and insights have been enhanced down to the SKU level, so analysts have the insight needed to **proactively avoid out-of-stock situations.**





Reps have **increased number of store visits** significantly by **eliminating manual data entry** at the end of the day and **optimizing their time in the stores.**

**STORE VISITS**





Managers can now access pre-configured reports from within the HQ Portal, so **data is easy to find and understand.**

The screenshot displays the Spring Mobile Solutions Admin HQ Portal interface. At the top, there is a navigation bar with tabs for Dashboard, Territory Mgmt, Monitoring, Collateral, Surveys, and Administration. Below the navigation bar, there are filters for Year, Quarter, Month, and Region. The main content area shows two reports: 'Region Sales Performance - Quarter Sales' and 'Quarter Sales Running Total'. Both reports display data for the year 2014 and 2015, broken down by quarter (Q1, Q2, Q3, Q4) and a Grand Total. The data is presented in a table format with alternating red and green background colors for the quarterly data cells.

ALT Region	Account	2014		2015				Grand Total
		Q4	Q1	Q2	Q3	Q4		
601022	Country Stop-Lawrenceville-30044	3,734	13,372	4,101	11,171	6,951	38,728	
	Country Stop-Lilburn-30047	4,261	7,398	1,146	4,897	8,195	26,837	
	Gas-n-Go-Duluth-30096	3,981	24,977	6,882	8,284	15,286	59,410	
	Gas-n-Go-Snellville-30078	1,576	10,447	6,505	11,256	4,177	33,964	
	Grumpys-Norcross-30093	5,067	37,238	8,116	20,129	22,496	93,047	
	Grumpys-Stone Mountain-30087	3,233	21,169	5,624	7,343	9,433	47,002	
	LM North East-Lawrenceville-30043	4,005	8,618	7,897	9,690	8,253	38,454	
	LM North East-Suwanee-30024		19,322	11,029	13,026	15,880	59,266	
	LM South East-Duluth-30096	3,937	10,044	3,393	5,644	15,391	38,406	
	LM South East-Duluth-30097	1,402	8,906	3,593	10,173	9,218	30,653	
	LM South East-Loganville-30052		6,701	5,682	6,784	10,371	29,537	
	LM West-Duluth-30097	1,563	9,438	3,062	7,550	5,282	26,894	
	LM West-Norcross-30092	3,582	8,162	6,604	5,510	3,098	27,856	
	LM West-Tucker-30084	648	8,564	4,808	5,192	6,134	23,347	
Grand Total		36,988	189,697	78,602	126,643	141,474	573,403	

ALT Region	Account	2014		2015				Grand Total
		Q4	Q1	Q2	Q3	Q4		
601022	Country Stop-Lawrenceville-30044	3,734	17,106	21,207	32,378	38,728	38,728	
	Country Stop-Lilburn-30047	4,261	11,599	12,745	17,642	26,837	26,837	
	Gas-n-Go-Duluth-30096	3,981	28,956	35,839	44,124	59,410	59,410	
	Gas-n-Go-Snellville-30078	1,576	12,022	16,528	29,787	33,964	33,964	
	Grumpys-Norcross-30093	5,067	42,306	50,422	70,582	93,047	93,047	



# STEP 1: Results



“RB is rapidly **closing the competitive gap**”



“We have the **ability to make more strategic decisions** and **focus on growth**”



“We now have the **benchmarks we need to track growth**”







# STEP 1: Results

**30%**

increase  
in **Customer  
Coverage**

**25%**

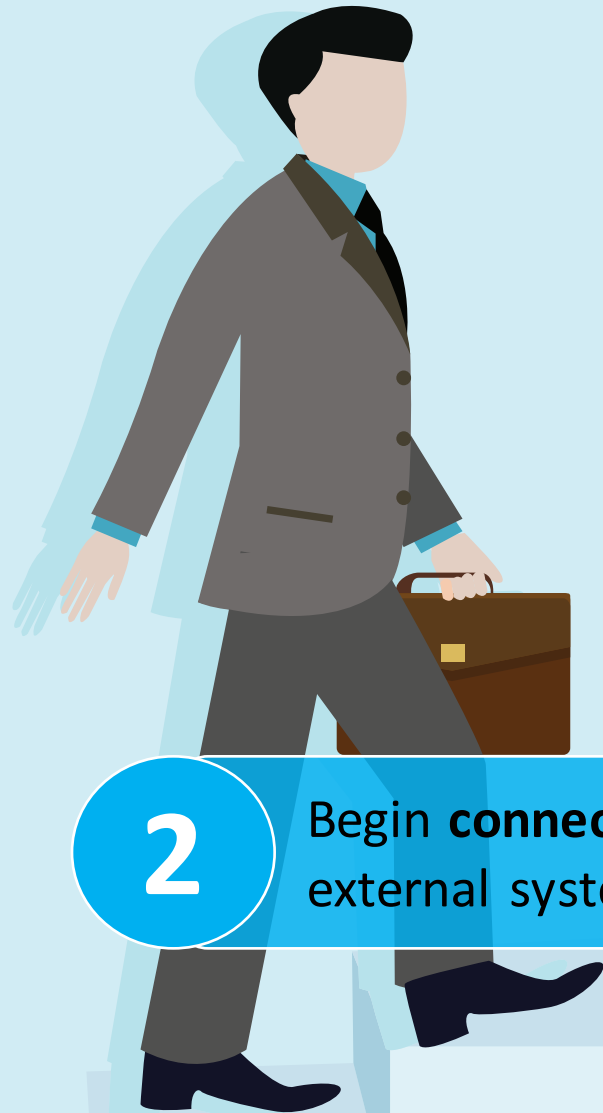
increase  
in number of  
**Vision Stores**

**Promotion**

Implementa-  
tions are up  
significantly



# Moving forward...



2

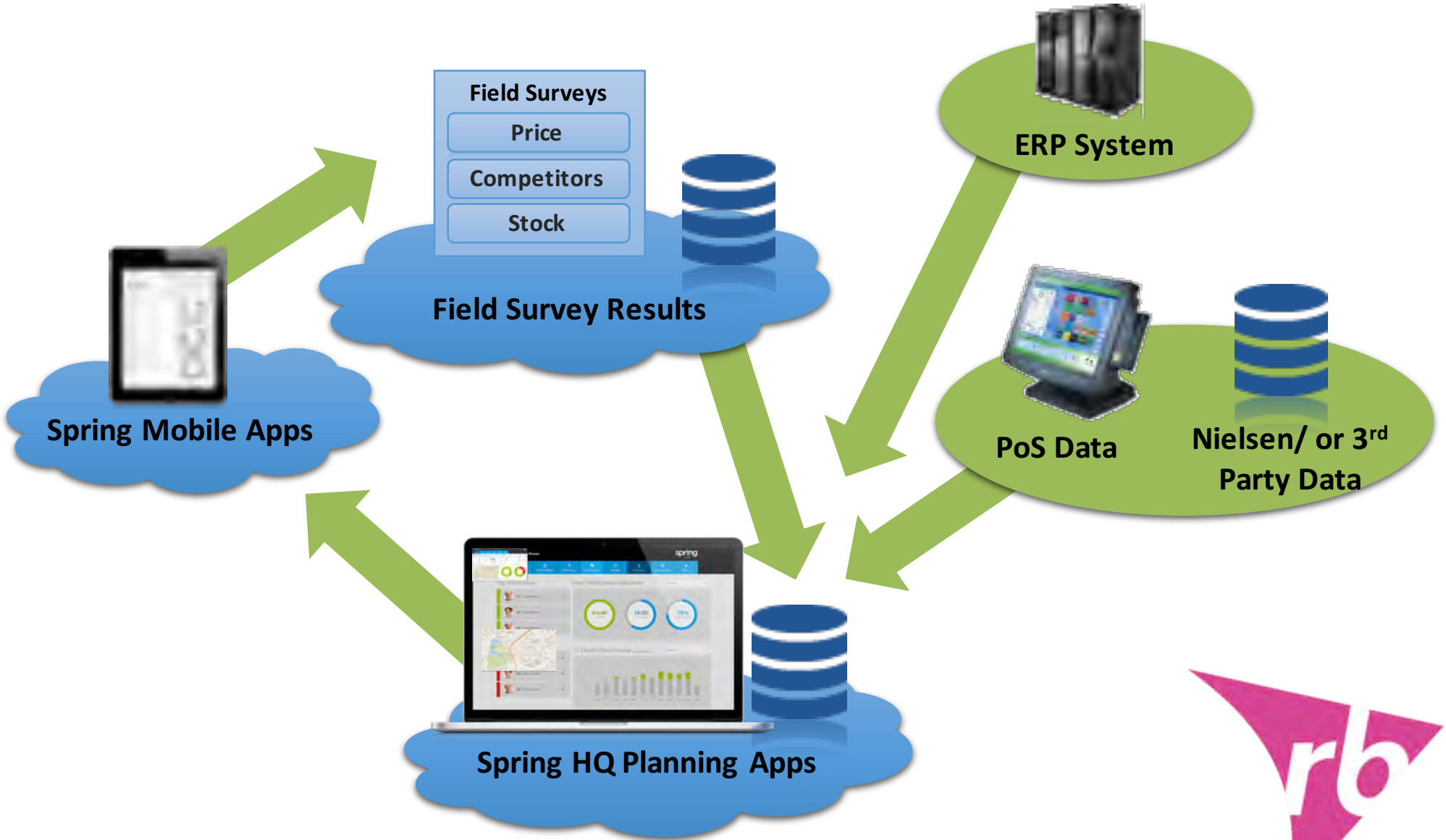
Begin **connecting** retail execution data to external systems & expand field communications



rb



# STEP 2: Connect Retail Execution data with external systems.





## STEP 2: Expand communications with the field.





# Moving forward...



3

**Actionable Insights** - Automatically take action based on data



rb

# STEP 3: Actionable Insights - Automatically take action based on insights.





## STEP 3: Actionable Insights - Automatically take action based on insights.

### Start Simple

'If we have product in the store, but it's not moving, then reps need to take action.'



### Add Complexity & Automate More

'If competitor's price is  $< X$  and sales have slowed, then lower price.'



# Moving forward...

4

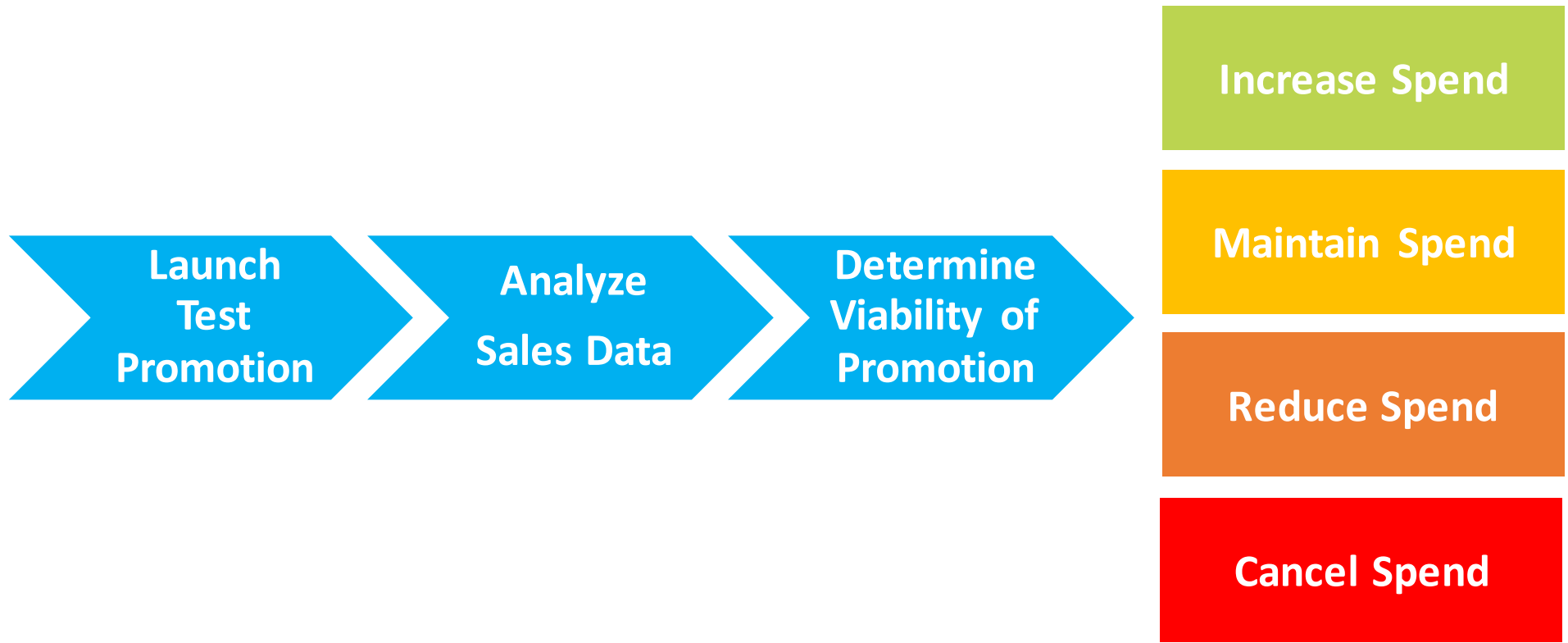
**Test & Learn** - Use data to test, learn & improve

rb





## STEP 4: Test & Learn - Run promotions and use data to analyze, learn, & improve.



“We are always planning programs that will boost sales, but have no ability to test them before we roll out on a large scale.”



# Moving forward...

5

**Predict issues and proactively take action**





**STEP 5: Predict issues** and proactively take action.



“Once we learn from Steps 4 & 5, we can find patterns and act before things go bad.”



# CONCLUSIONS



# There is no shortage of data

- The challenge is finding it and making sense of it!
- The right user needs access to the right data at the right time
- People who need the data shouldn't have to work hard to get what they need...put it at their fingertips







# Usability is key

- Data must be:
  - Easy to access (keep it simple!)
  - Easy to understand
  - Placed within the context of activities, instead of requiring users to hunt for it and make sense of it
  - Eventually used to automatically assign activities in the field



# You can't do it all at once!

- Take baby steps
- Develop a vision
- Define a roadmap of how to get there
- Build on the vision one step at a time





# Q & A