

THE POI RETAIL EXECUTION SUMMIT

Gaining Competitive Advantage with
Exceptional Retail Execution



Leveraging Insights from the Field to Drive Behavior that Increases Sales & Promotion Effectiveness

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VP, Customer & Partner Solutions

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Some analytics about analytics

Organizations adept at analytics enjoy

1.6 X

**More Revenue
Growth**

2 X

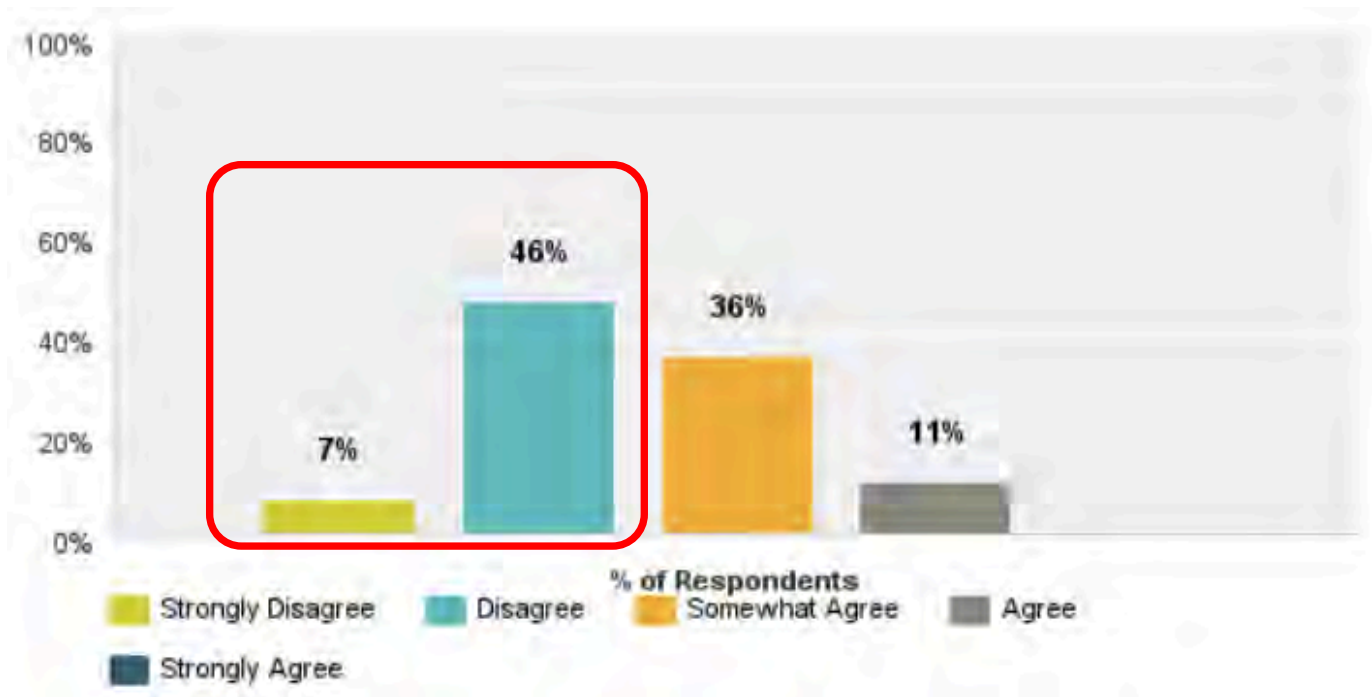
**More Profit
Growth**



Some analytics about analytics

52%

Disagree or Strongly disagree that their retail execution solution **provides the analytical capabilities required to make appropriate decisions at the store level**

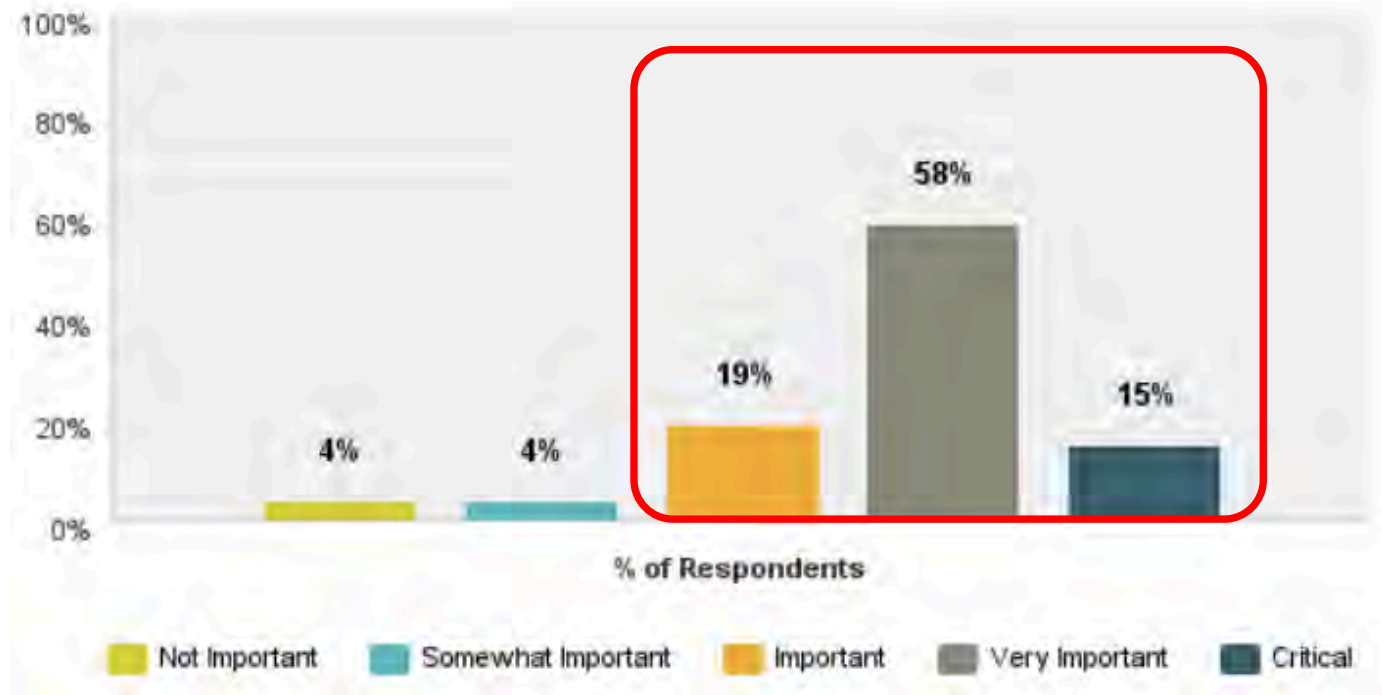




Some analytics about analytics

92%

Of CG companies find the ability of **analytics to show an aspect of the business in an insightful way** or KPI to be **Important to Critical**.

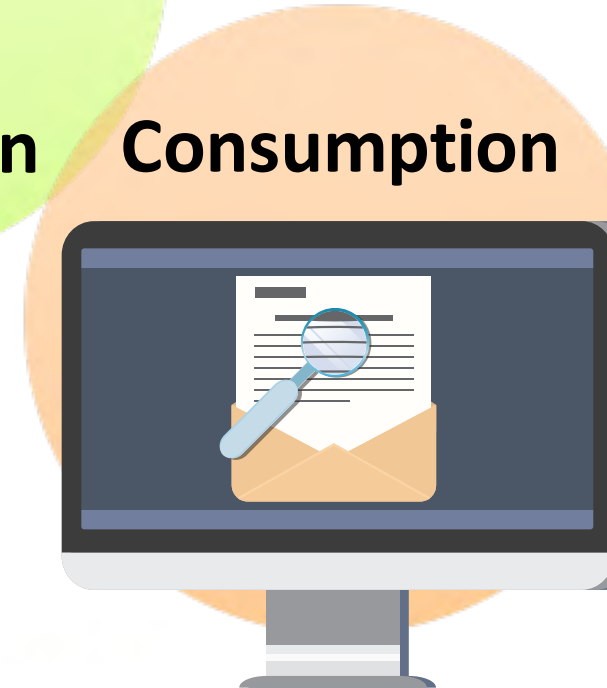
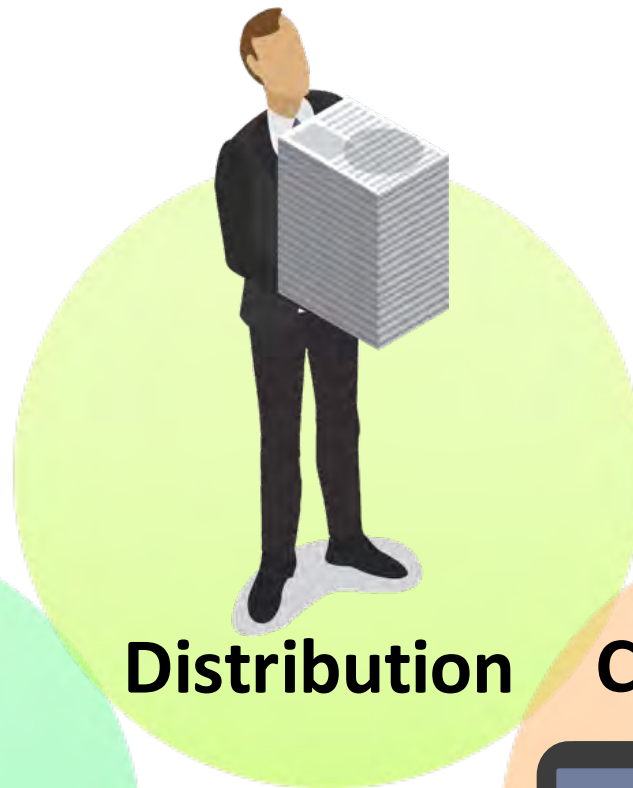
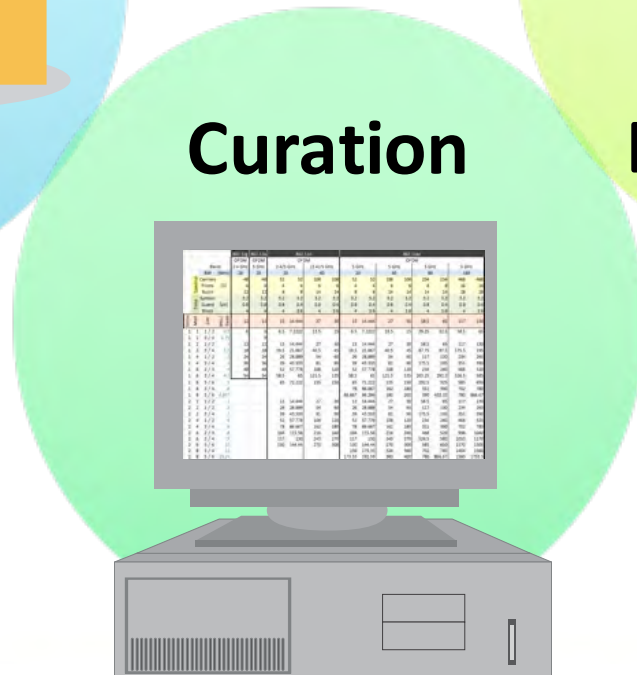




There's no shortage of data!



...but most data management practices are outdated.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.





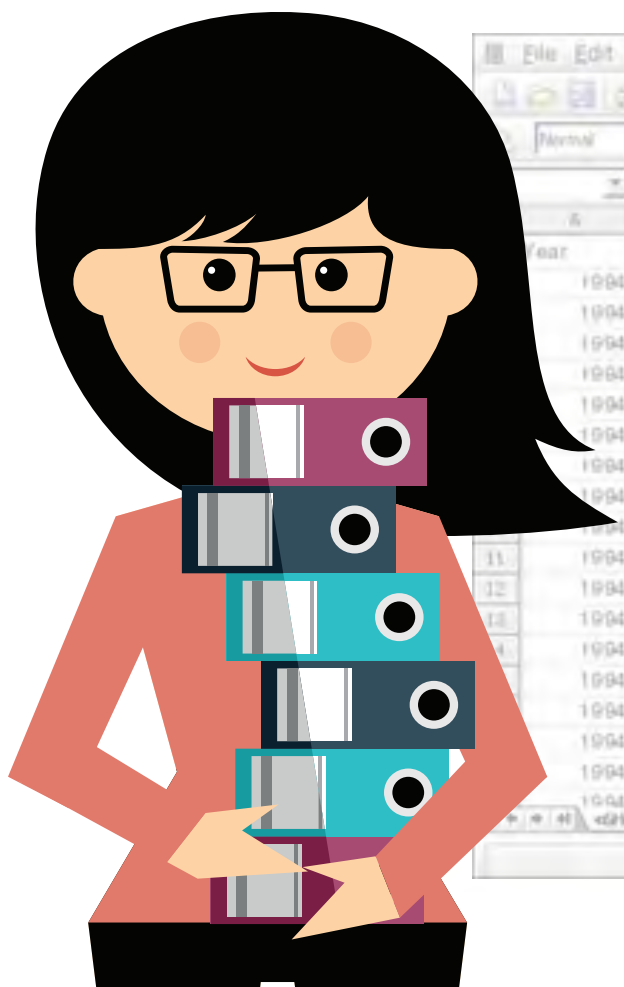
Curating data is a manual and time-consuming process.





Data is still distributed using

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



Year	Month	Day	US1	US2	US3	RG1	RG2	RG3	RG4	RG5
1994	10	1	0.28963	0.46517	0.23175	2.4	0	0	1.6	12
1994	10	1	0.28583	0.4625	0.228	3.2	1.6	0.8	2.4	11.2
1994	10	1	0.28538	0.45821	0.22596	6.4	4	3.2	5.6	8
1994	10	1	0.285	0.46363	0.22383	4.8	0	0.8	3.2	12.8
1994	10	2	0.285	0.48592	0.22258	4	0.8	0	0	4.8
1994	10	2	0.28704	0.48758	0.22708	0.8	0.8	2.4	4	4
1994	10	2	0.29942	0.48504	0.25571	19.2	8.8	24.8	34.4	69.6
1994	10	2	0.33192	0.50292	0.31425	3.2	2.4	0.8	5.6	4.8
1994	10	3	0.38304	0.55492	0.61567	4	4.8	13.6	24.8	4.8
1994	10	3	0.56145	0.69425	0.79221	2.4	6.4	14.4	19.2	6.4
1994	10	3	0.74096	0.73067	0.68913	0	0	0	16.8	0



✖ This image cannot currently be displayed.

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





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

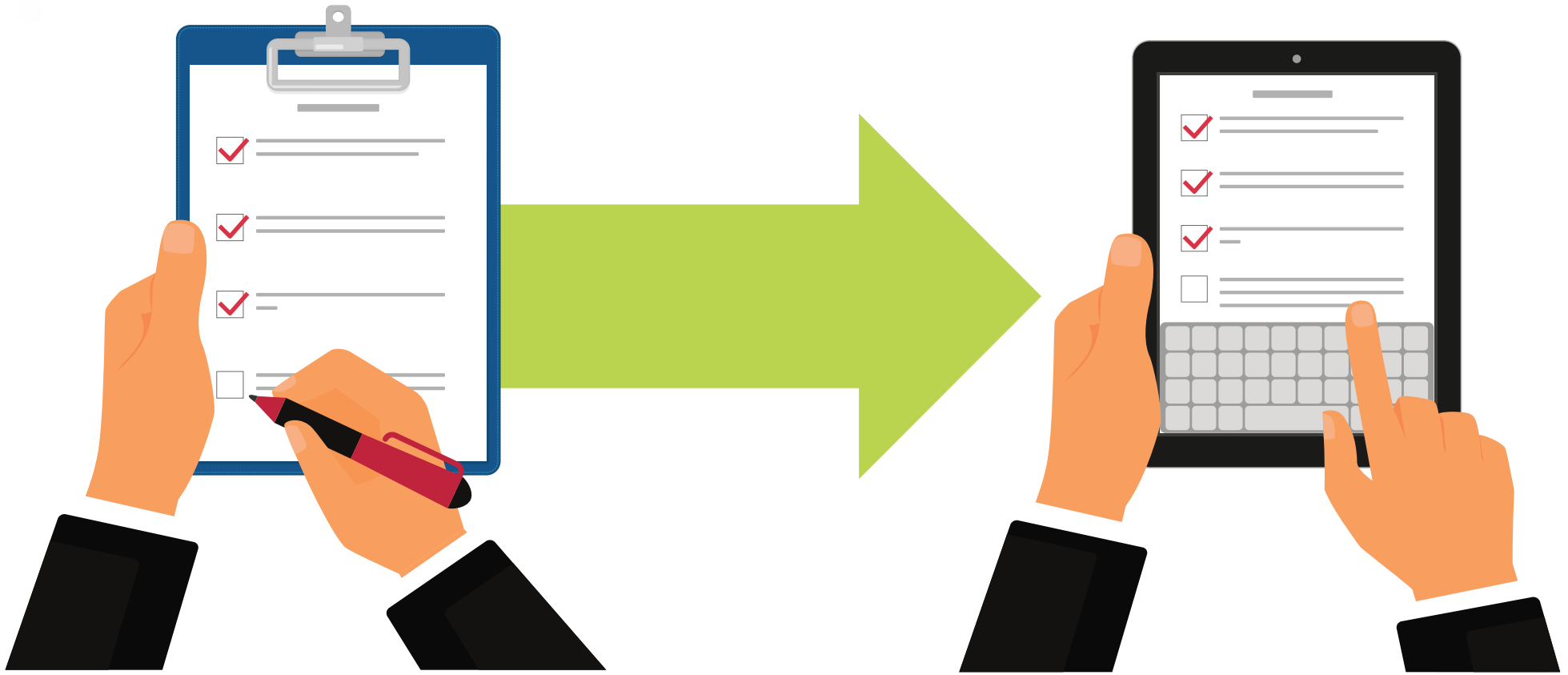
Lack of insight was leading to **out-of-stock** situations

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





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

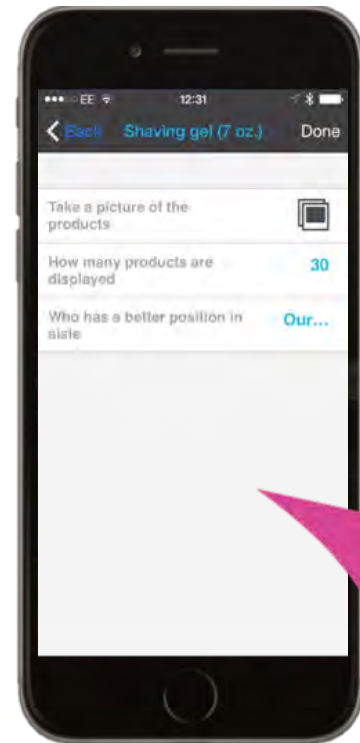
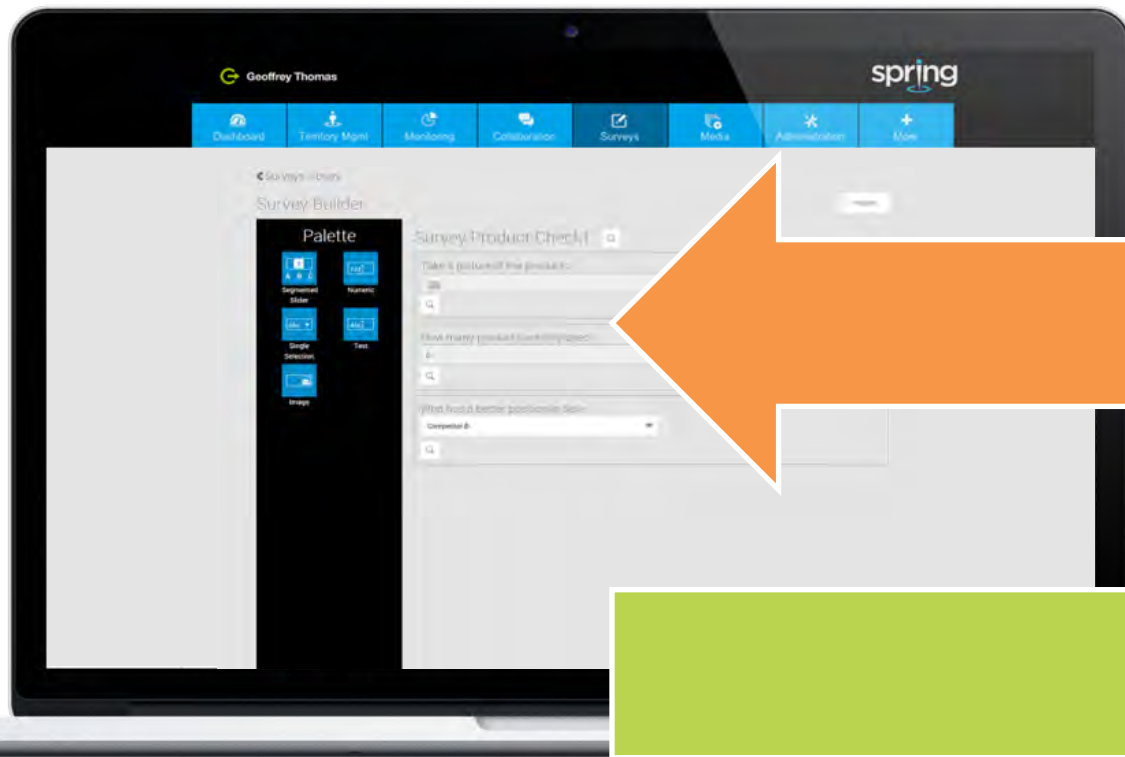


This eliminated data entry errors & lost paperwork and enabled them to enforce best practices.



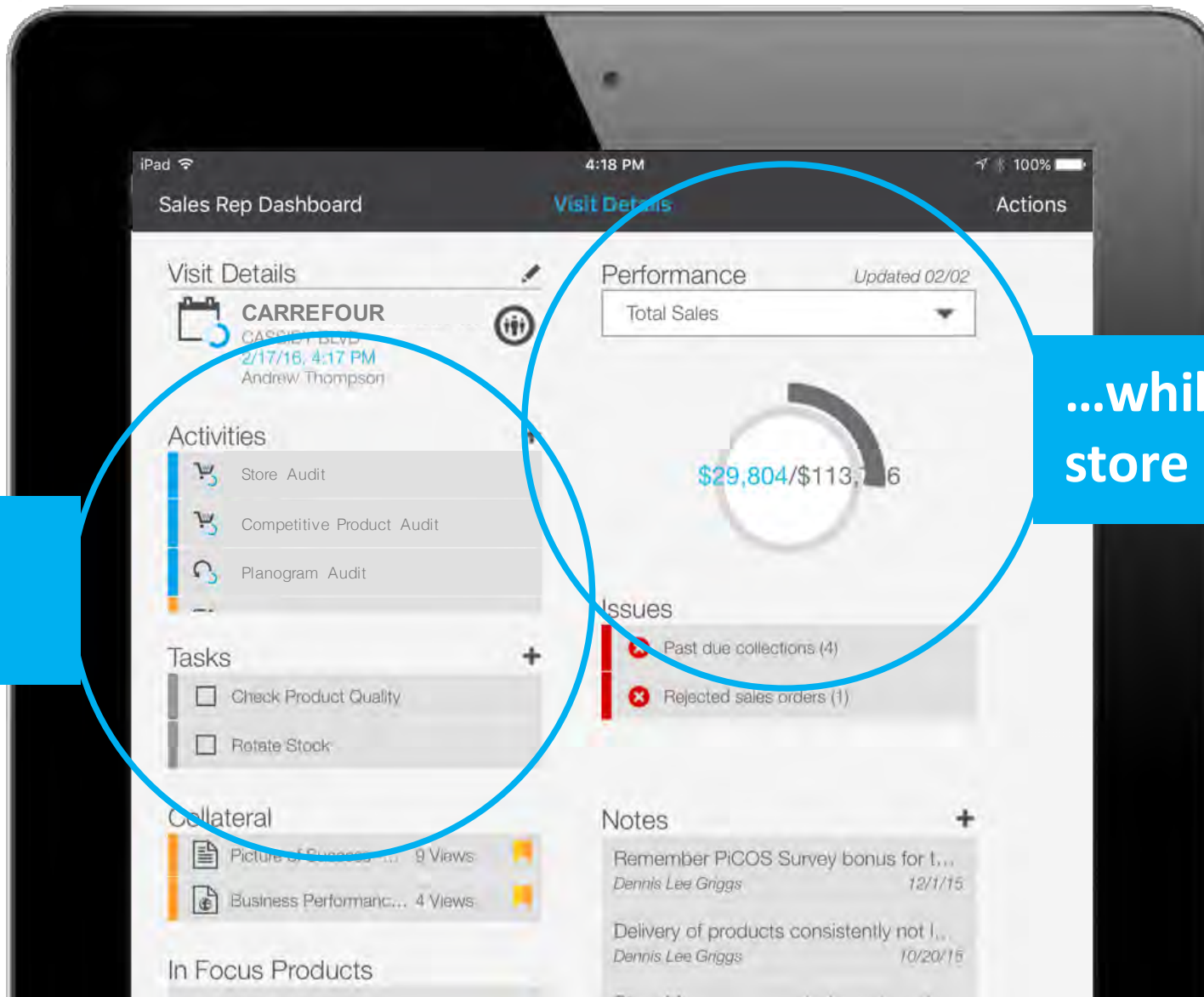


RB began collecting more robust data in the field, including **dynamic audit surveys** they could publish & start to get results on demand.





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



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

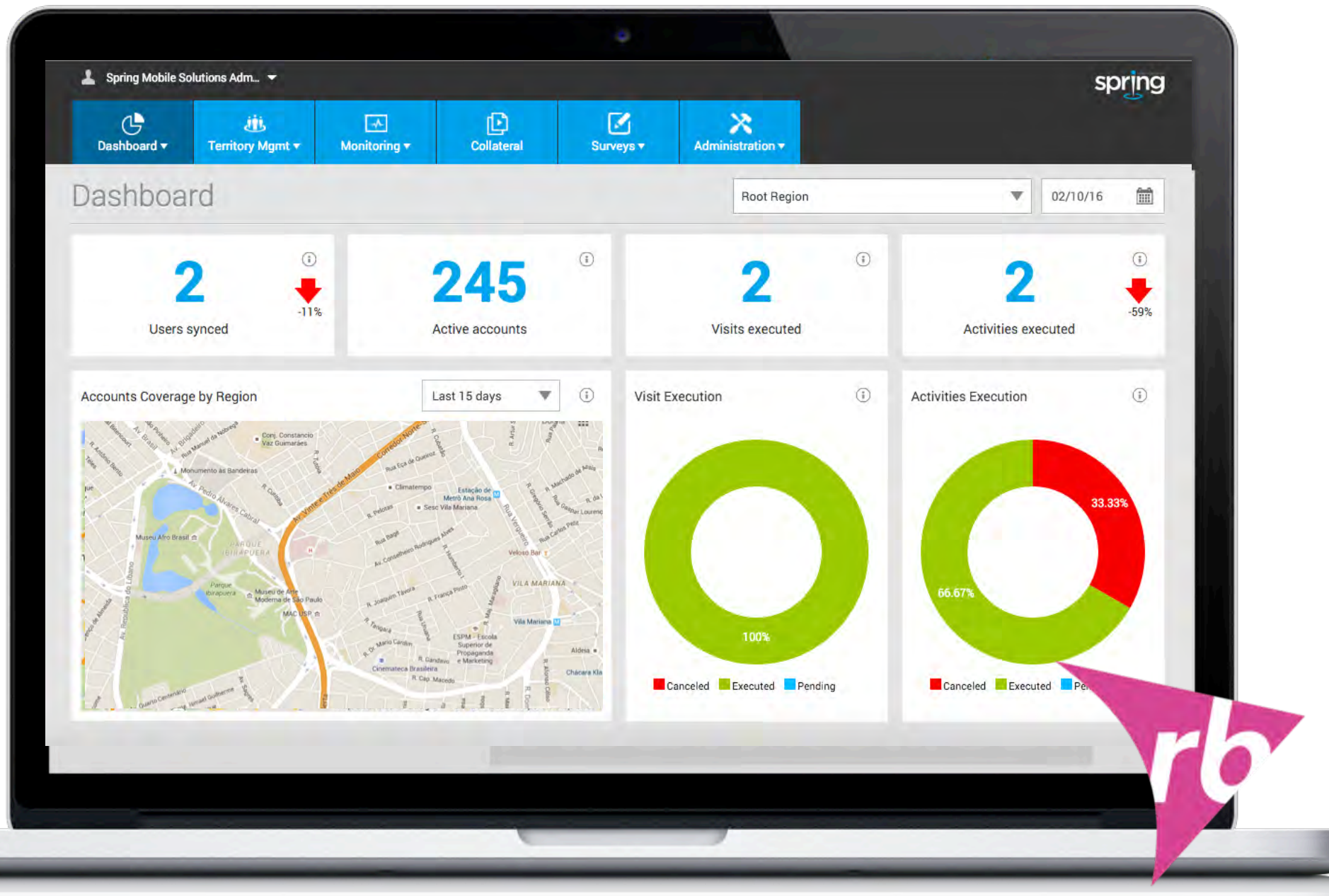
Productivity

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 & **optimizing 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.

Spring Mobile Solutions Admin... spring

Dashboard Territory Mgmt Monitoring Collateral Surveys Administration

Year: (Multiple values) Quarter: (All) Month: (All) Region: 601022

Region Sales Performance - Quarter Sales

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	6,351	38,728	
	Country Stop-Liburn-30047	4,261	7,338	1,146	4,897	6,195	26,637	
	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 Mounta-30087	3,233	21,169	5,824	7,343	6,433	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	15,889	59,266	
	LM South East-Duluth-30096	3,937	10,044	3,393	5,644	15,351	38,406	
	LM South East-Duluth-30097	1,402	6,306	3,553	10,173	6,218	30,653	
	LM South East-Loganville-30052		6,701	5,682	6,784	10,371	29,537	
	LM West-Duluth-30097	1,563	6,436	3,062	7,550	5,282	26,894	
	LM West-Norcross-30092	3,582	8,162	6,604	5,510	3,998	27,856	
	LM West-Tucker-30084	648	8,564	4,808	5,192	6,134	23,347	
Grand Total		36,998	189,697	78,602	126,643	141,474	573,403	

Quarter Sales Running Total

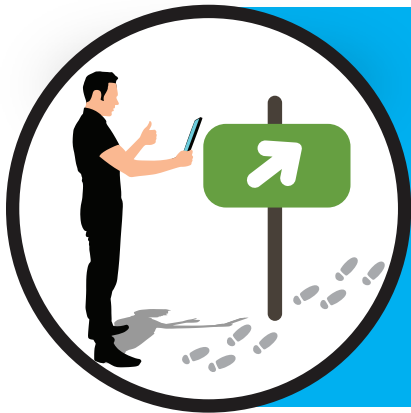
ALT Region	Account	2014		2015				Grand Total
		Q4	Q1	Q2	Q3	Q4		
601022	Country Stop-Lawrenceville-30044	3,734	17,106	21,207	32,378	38,728	38,728	
	Country Stop-Liburn-30047	4,261	11,599	12,745	17,642	26,637	26,637	
	Gas-n-Go-Duluth-30096	3,981	28,058	35,639	44,124	59,410	59,410	
	Gas-n-Go-Snellville-30078	1,576	12,022	18,526	20,757	33,964	33,964	
	Grumpys-Norcross-30093	5,067	42,306	50,422	70,552	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%

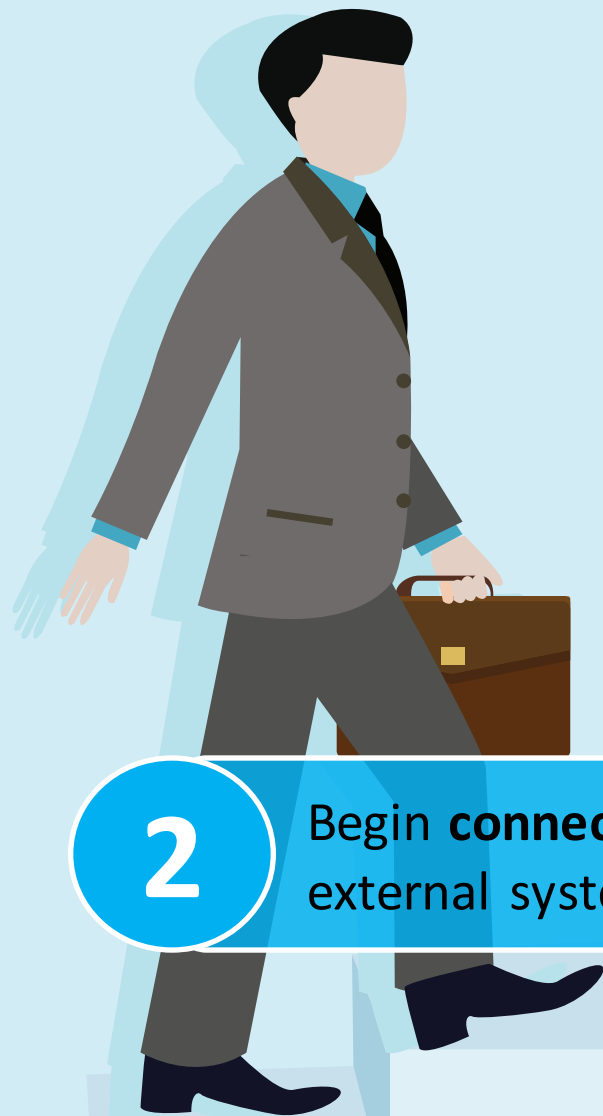
increase
in number of
Vision Stores

Promotion

Implementa-
tions are up
significantly



Moving forward...

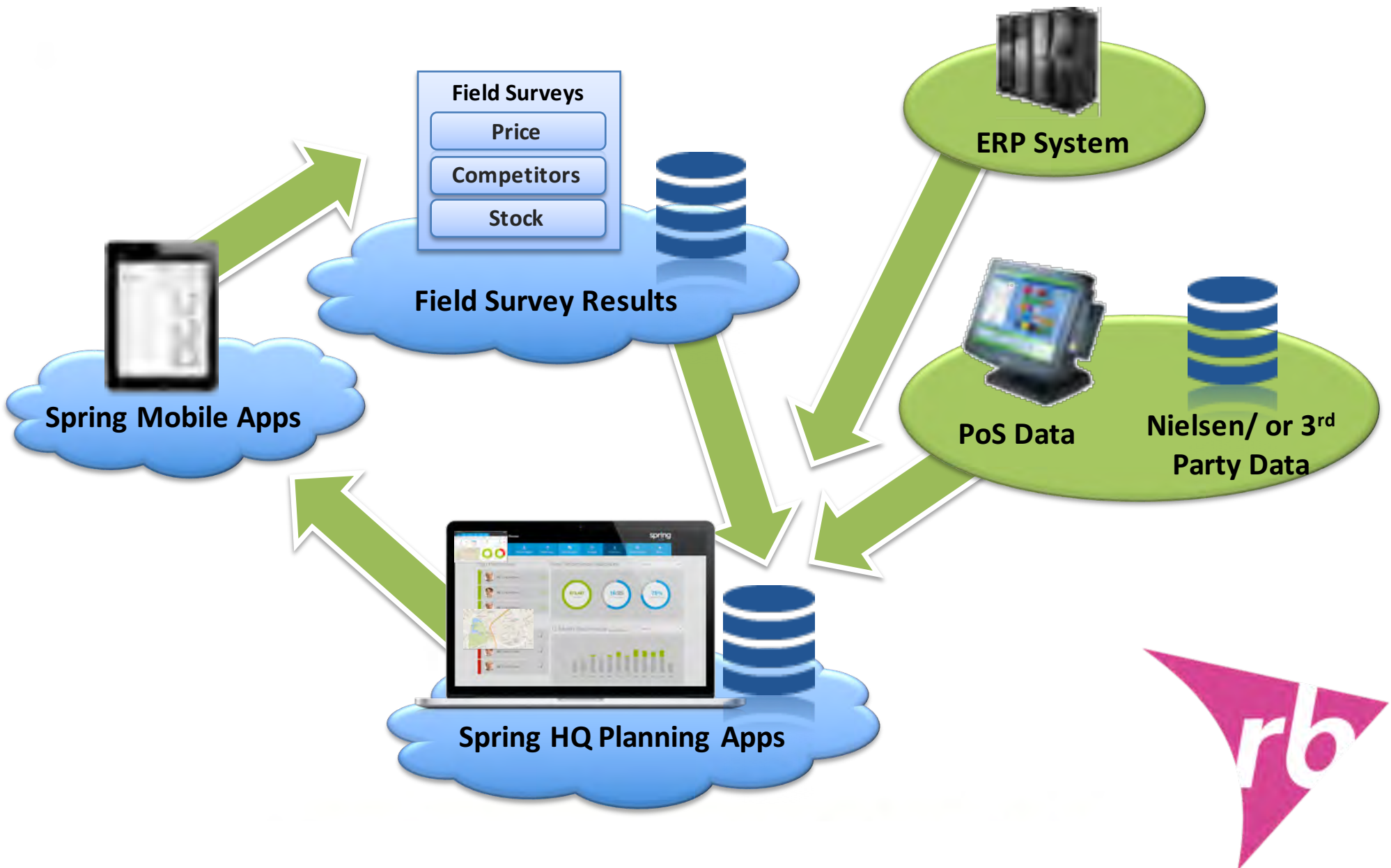


2

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...

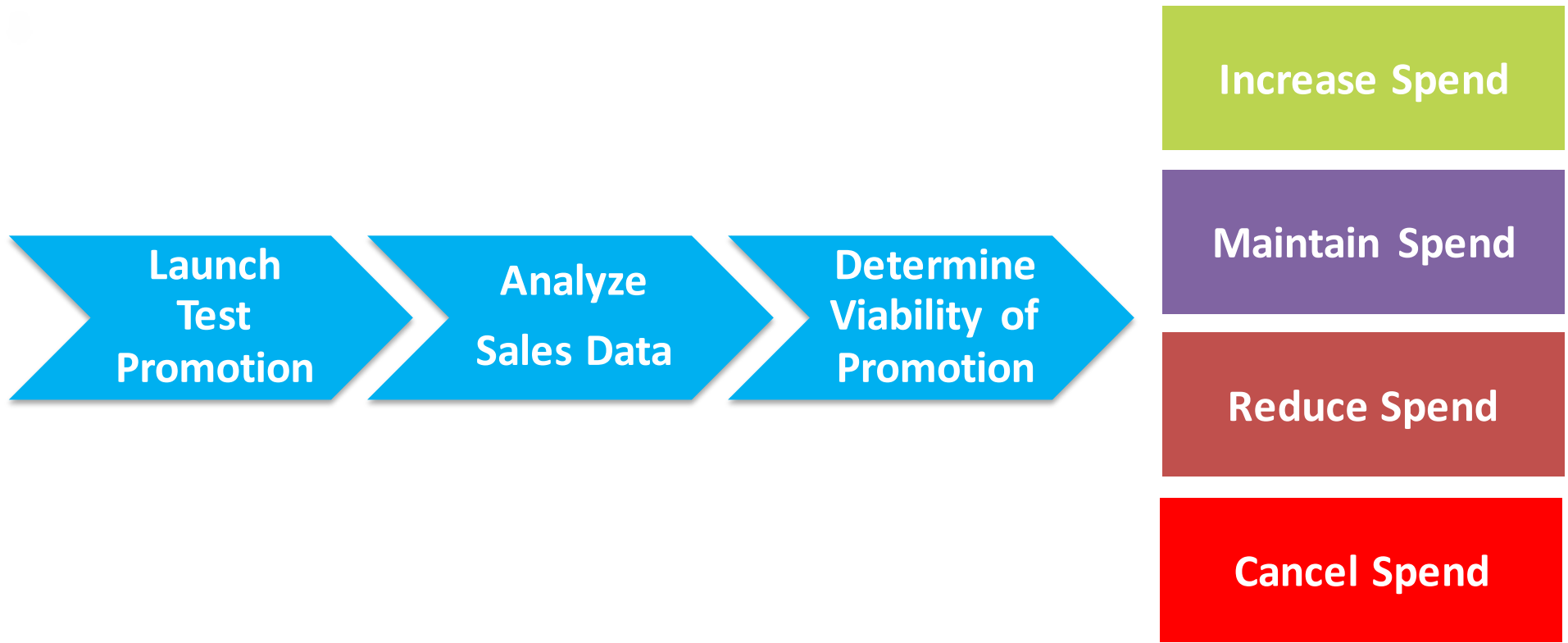
4

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





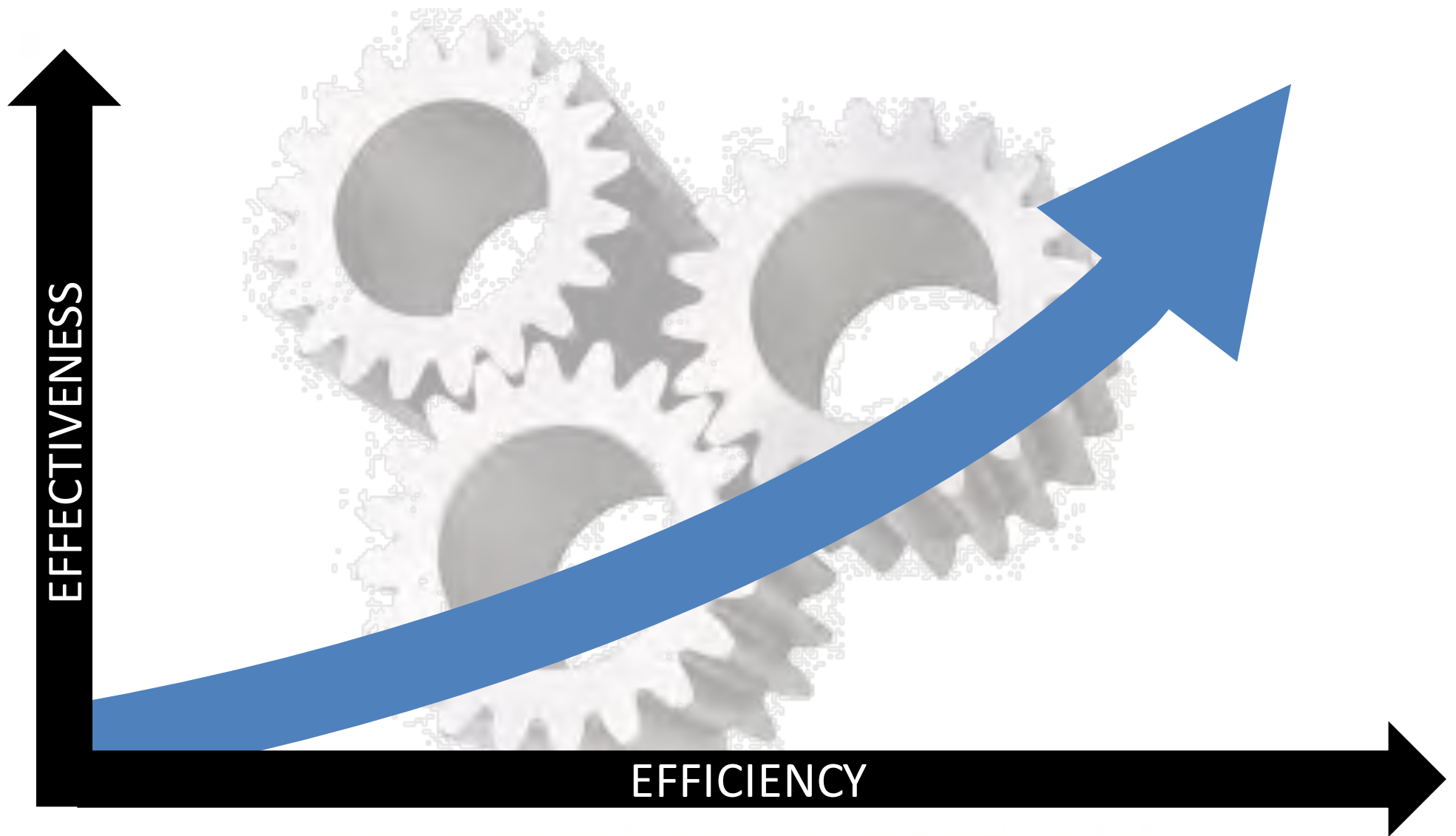
Usability is key

- 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





The end result is **best practices that evolve** as more is learned from the data



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



“Data without action is just trivia”

Q & A