



PLANNING FOR ~~trouble~~

SUCCESS

& the intersection of sales people, processes, & technology

Promotion Optimization Institute • Spring Summit 2019 • Chicago, IL

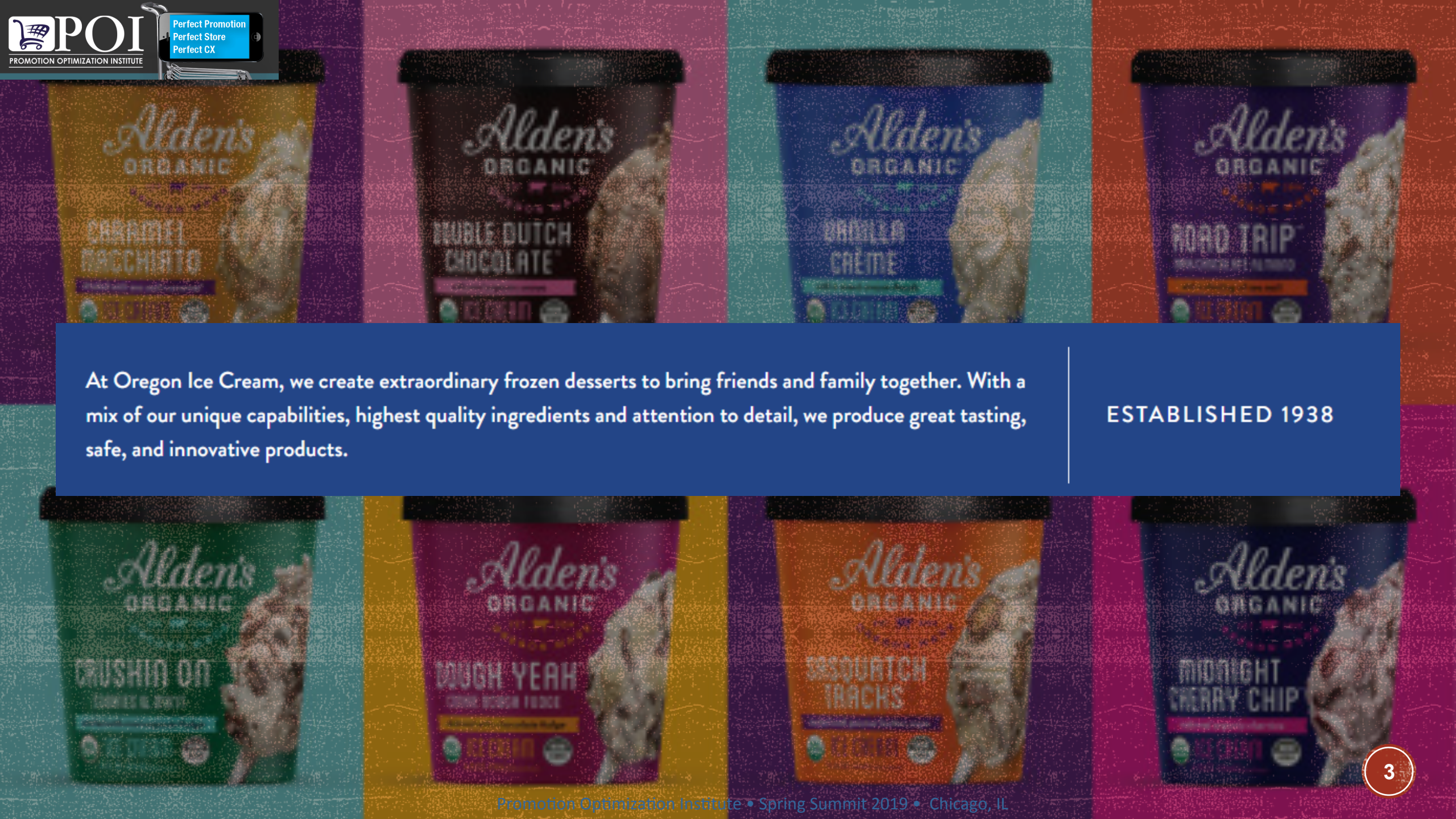
Promotion Optimization Institute • Spring Summit 2019 • Chicago, IL



JOELLE SIMMONS

- **Vice President of Sales, Oregon Ice Cream**
- **Aquarius**
- **Do I Have Experience? Yup!**
 - **Frito-Lay, Kettle Brand Potato Chips, Sahale Snacks**





At Oregon Ice Cream, we create extraordinary frozen desserts to bring friends and family together. With a mix of our unique capabilities, highest quality ingredients and attention to detail, we produce great tasting, safe, and innovative products.

ESTABLISHED 1938



**PROUDLY AND
PROGRESSIVELY OREGON**



**BRING A PLAYFUL TWIST
TO FAMILIAR FAVES**



**"ALL IN" ON ORGANIC
BECAUSE WE CARE**



**TRUE-TO-FLAVOR
REAL TASTE**

NEW PACKAGING

TODAY



Simple and clean

TOMORROW



Deliciously bold in the case

MORE MODERN MARKETING

TODAY



Traditional family and nostalgia marketing

TOMORROW



*Modern fam;
Authentic and fun-loving with more spunk*

NEW INNOVATION

TODAY



Emphasis on classic favorites

TOMORROW



*Familiar favorites with an
ADDED PLAYFUL TWIST*

EXPLORE



Everyday Indulgence

SHARE



Sharing
Occasions

SNACK

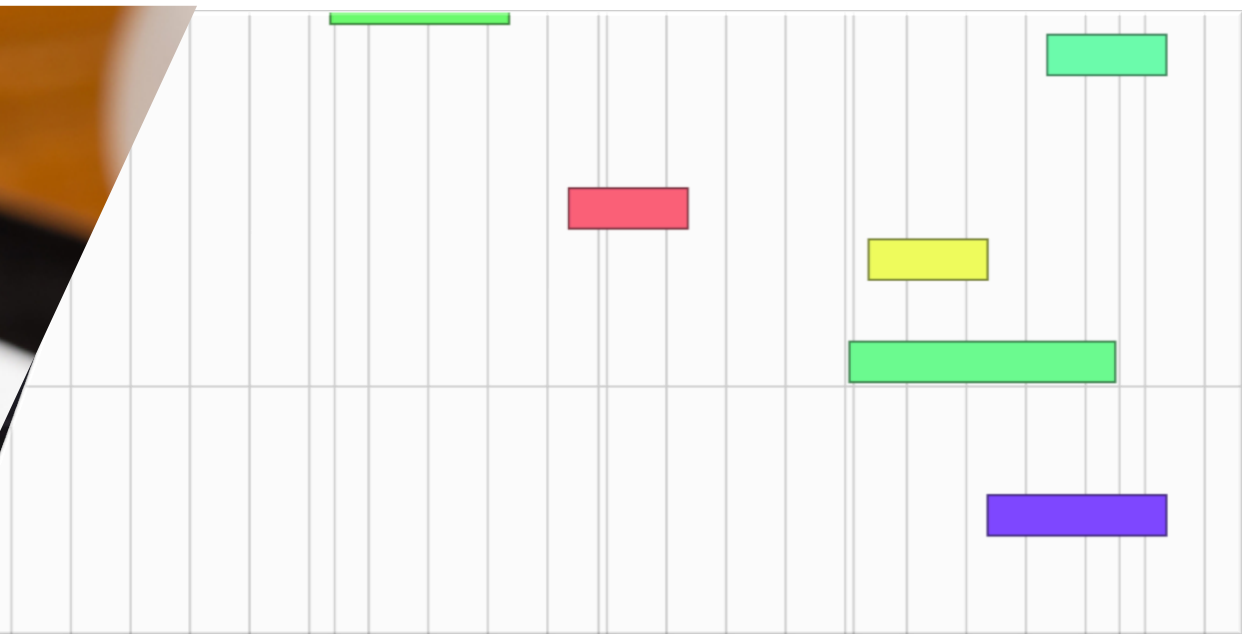


Portion Control

NOW ALDEN'S HAS IT ALL!

ONE PORTFOLIO THAT DRIVES GROWTH ACROSS ALL PRODUCT SEGMENTS





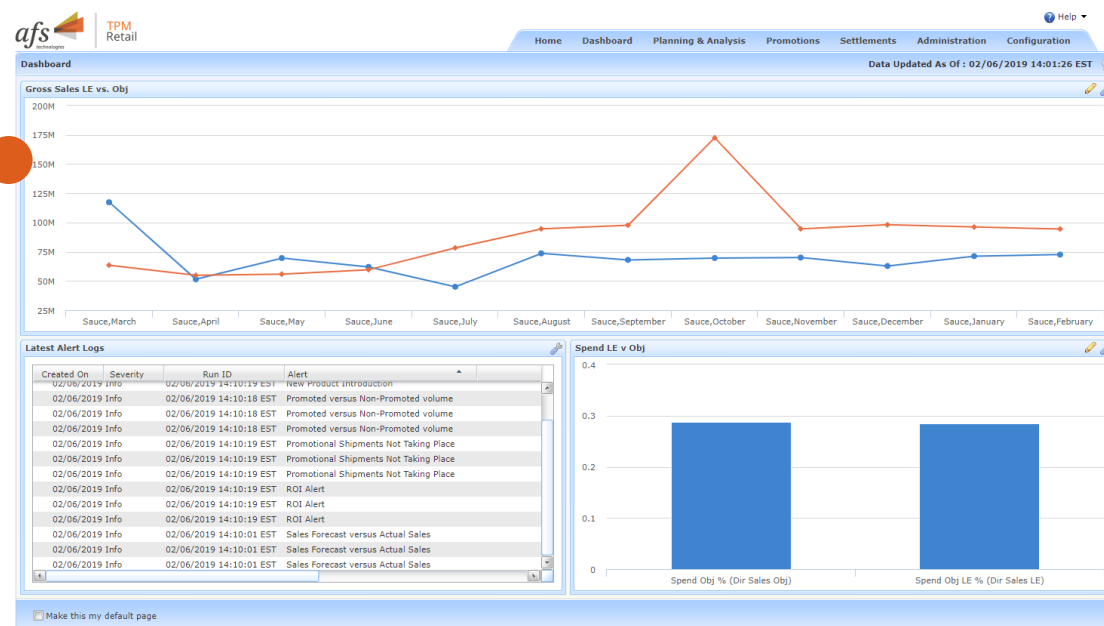
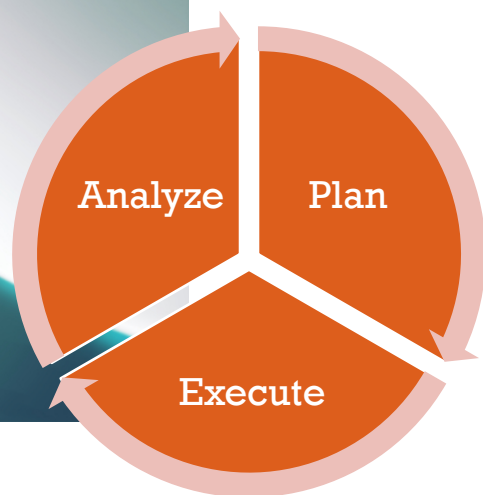


Tenure

Selling Skill

Interpersonal Skill

Analytic Skill



TPM

TPO

RE



TED

Trouble Enlightenment Discussion



HIDDEN BRAIN

A CONVERSATION ABOUT LIFE'S UNSEEN PATTERNS

The Trick To Surviving A High-Stakes, High-Pressure Job? Try A Checklist

October 30, 2017 - 9:00 PM ET

Surgeon Atul Gawande still remembers the operation years ago that went catastrophically wrong. He was removing a tumor from the adrenal gland of a patient he refers to as Mr. Hagerman.



HIDDEN BRAIN

Gawande had performed this procedure dozens of times before. But this case was particularly tricky. Mr. Hagerman's tumor was behind his liver, nestled tightly against an important blood vessel known as the vena cava. Gawande was almost done when all of a sudden, he nicked the blood vessel.

"I ended up creating a hole in the vena cava, which meant that he then pretty quickly lost his entire blood volume into his abdomen. Complete blackout on the screen...and utter chaos," he recalls.

It was a **happy ending**, and, at first blush, a textbook case of medical heroics. A doctor makes a mistake, but he fixes it, taking a heart into his bare hands and squeezing life back into his patient's body.

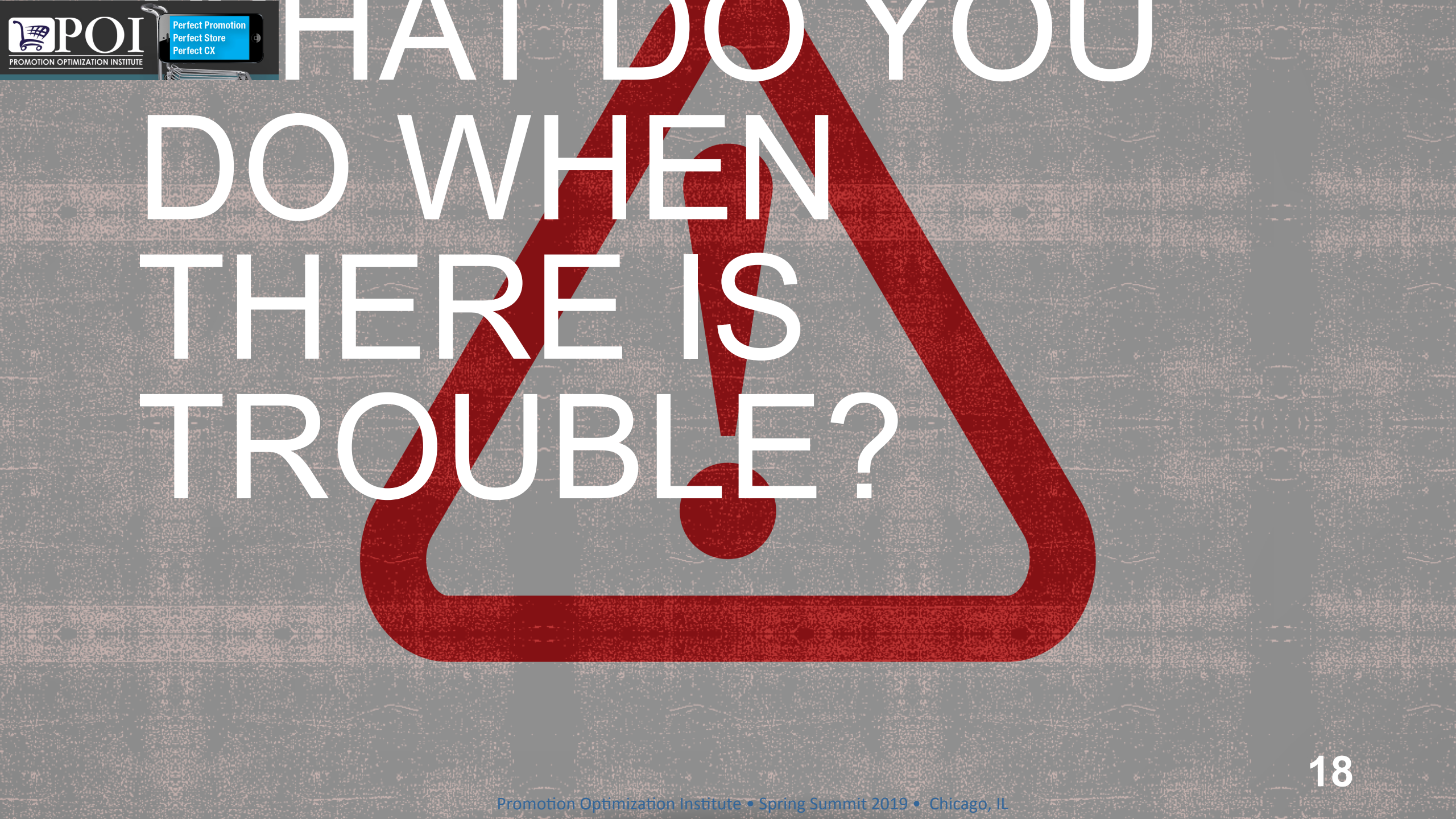
But skill and brainpower were not the reason Mr. Hagerman survived. Gawande says what actually saved his patient's life was a plan the surgical team had made before they began the surgery. This plan wasn't grand or complicated. In fact, it was a humble checklist.

"And what happened was...when we ran the checklist, when we got to the part where we said, 'What's the goal of the operation and tell me anything unexpected about this,' I mentioned to the anesthesiologist that this tumor was pretty tightly against the vena cava. The anesthesiologist then prepared to get more blood into the room, just in case."



SELLING PROCESS

- ✓ CREATE GREAT STRATEGY
- ✓ BUILD BUSINESS PLAN TO DELIVER SALES TARGET
- ✓ PERSUADE CUSTOMERS TO BUY YOUR PRODUCTS
- ✓ PERSUADE CUSTOMERS TO PRICE & PROMOTE PROPERLY
- ✓ PRODUCE PRODUCTS ON SCHEDULE
- ✓ SHIP ORDERS OUT ON SCHEDULE
- ✓ COLLECT REVENUE/PAY BILLS



WHAT DO YOU DO WHEN THERE IS TROUBLE?





EMERGEN CY PREPARE DNESS PLAN



IN REAL LIFE: EXAMPLES OF DESIGNING PLAN B ... AND PLAN C!

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CREATING YOUR PLAN

People/
Process

Technology

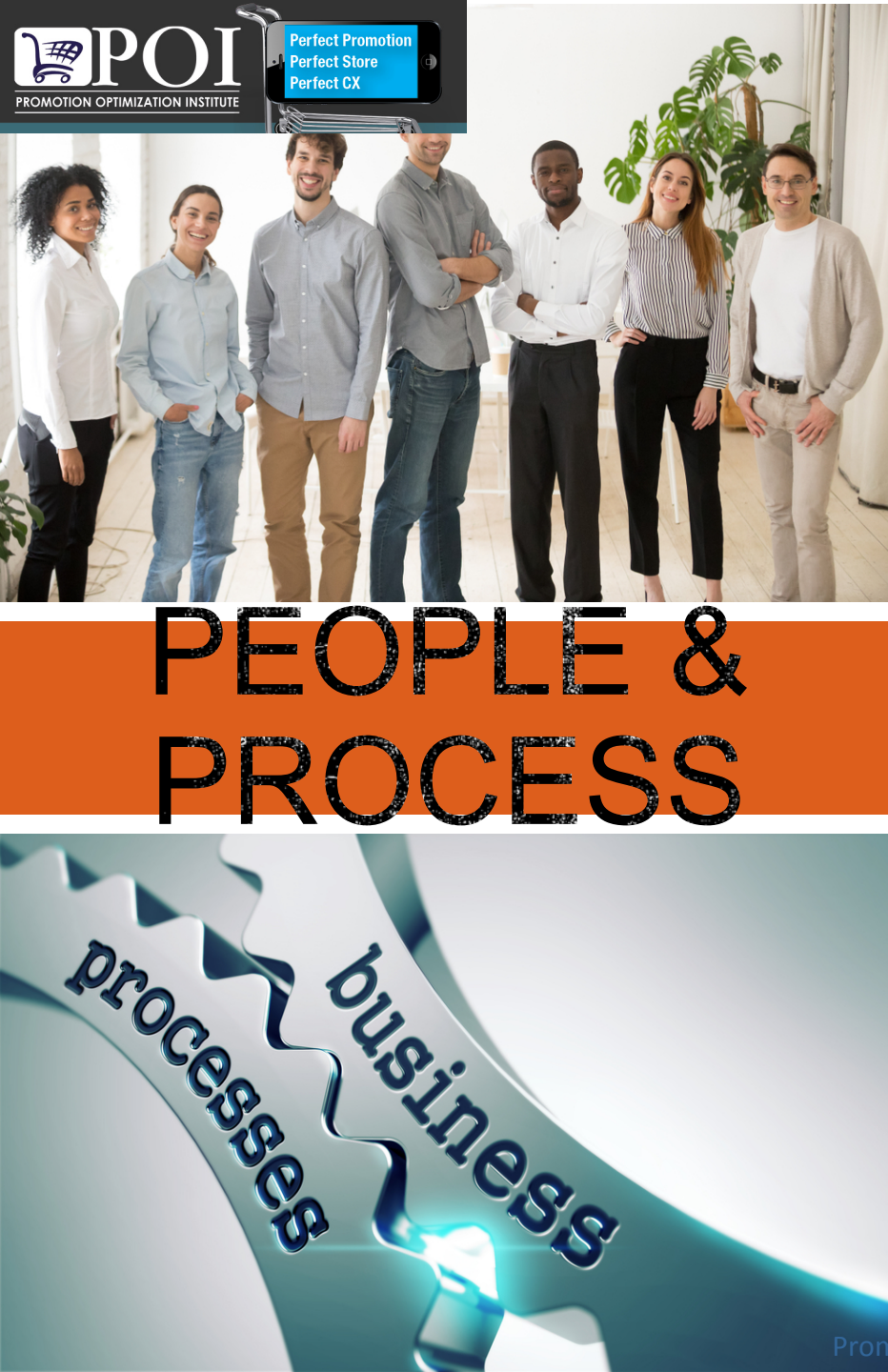


PEOPLE & PROCESS



What could
go wrong?

What will we
do if there is
trouble?



Codify the creation of emergency plans

Annual Sales Planning

Initiatives

- Price Changes
- New Product

Externalities

- Shortages
- Recalls
- Shipping issues
- Competitive Activities

Add the step to each & every process/project

SALES TECH MUST ENABLE YOU TO

- Assess the situation
- Identify options to close gaps

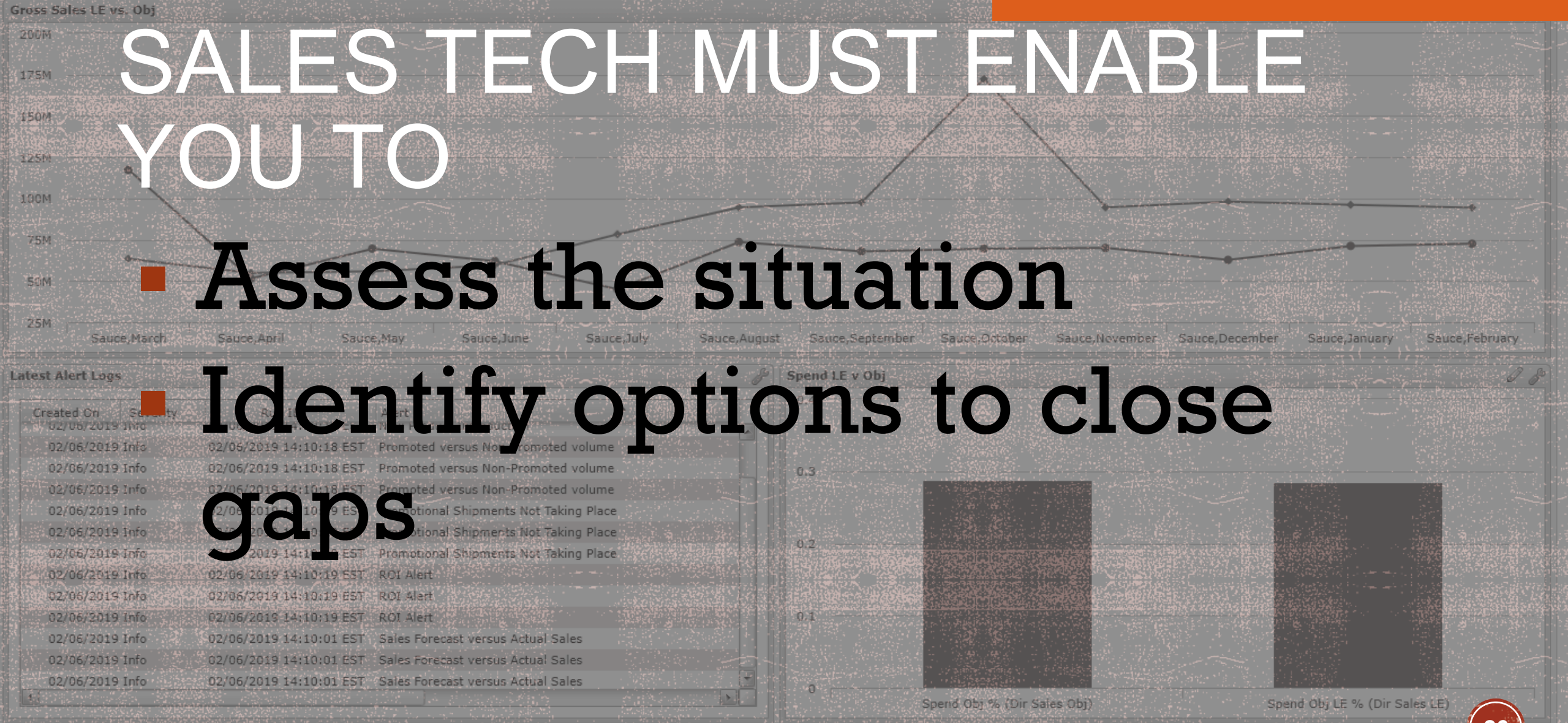


TABLE STAKES

- Quickly understand performance vs. KPIs
- Real-time data
- Complete set of objectives, plans, latest estimate, actuals- direct & indirect customers
- Easy control of layout
- Ability to create measures on-the-fly
- Scenarios

Gross Sales LE vs. Obj



Latest Alert Logs

Created On	Severity	Message
02/06/2019	Info	02/06/2019 14:10:19 EST New Product Introduction
02/06/2019	Info	02/06/2019 14:10:18 EST Promoted versus Non-Promoted volume
02/06/2019	Info	02/06/2019 14:10:18 EST Promoted versus Non-Promoted volume
02/06/2019	Info	02/06/2019 14:10:18 EST Promoted versus Non-Promoted volume
02/06/2019	Info	02/06/2019 14:10:19 EST Promotional Shipments Not Taking Place
02/06/2019	Info	02/06/2019 14:10:19 EST Promotional Shipments Not Taking Place
02/06/2019	Info	02/06/2019 14:10:19 EST Promotional Shipments Not Taking Place
02/06/2019	Info	02/06/2019 14:10:19 EST ROI Alert
02/06/2019	Info	02/06/2019 14:10:19 EST ROI Alert
02/06/2019	Info	02/06/2019 14:10:01 EST Sales Forecast versus Actual Sales
02/06/2019	Info	02/06/2019 14:10:01 EST Sales Forecast versus Actual Sales
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Spend LE vs. Obj



TABLE STAKES

- Accurate planning
 - Don't have to "fudge" inputs
 - Plan at any level of hierarchy
 - Base & incremental sales- plan and actual
- Indirect customer spending that rolls-up under their distributor(s)
- Ability to make top-down adjustments
- "Spend Expense"
- Accurate association of actuals to plan

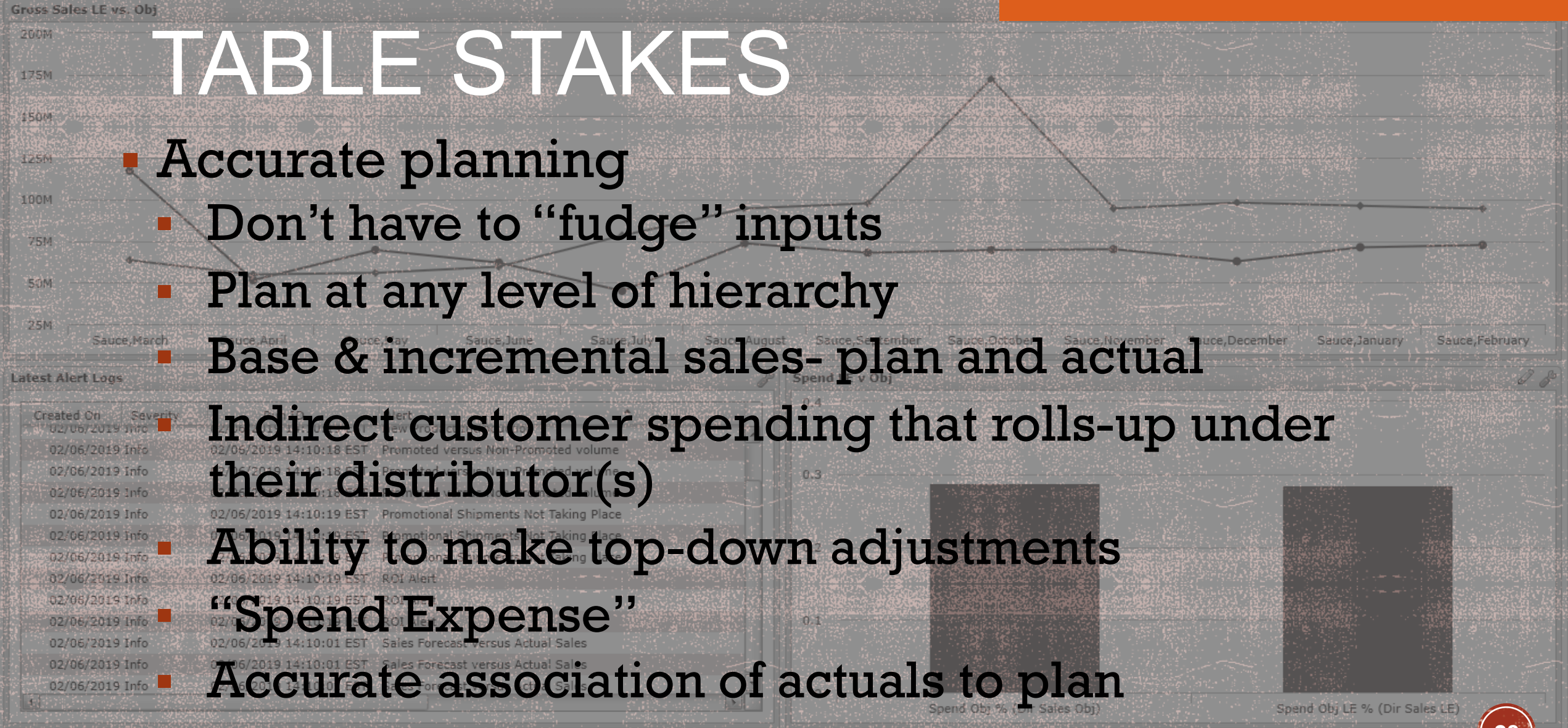
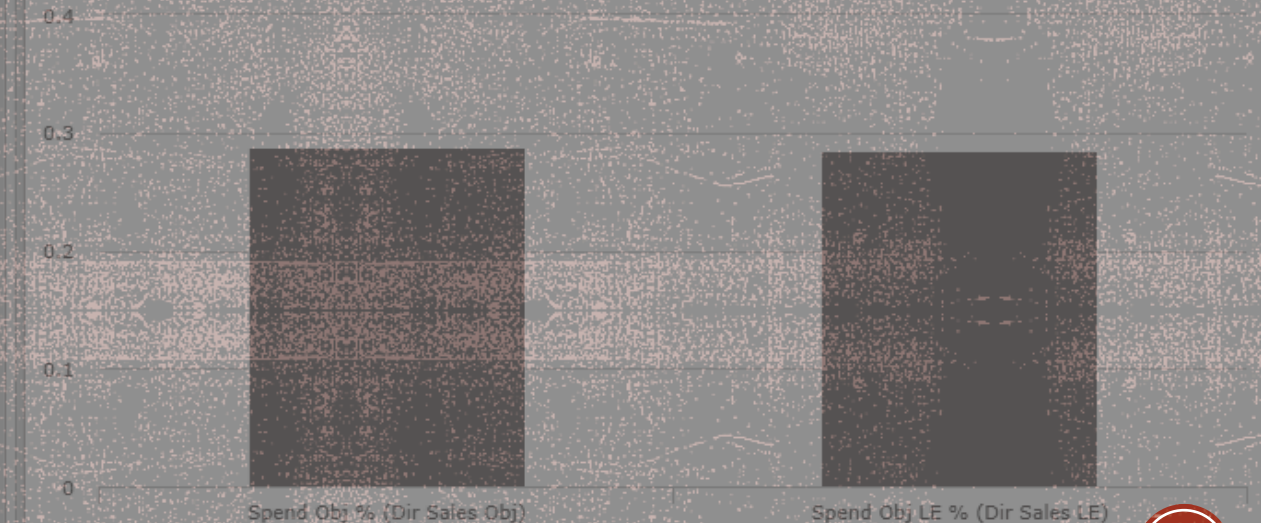


TABLE STAKES

- Visibility and communication
- Single repository of content
- Approval mechanism with multiple levels
- Visibility of changes to plan, audit trail

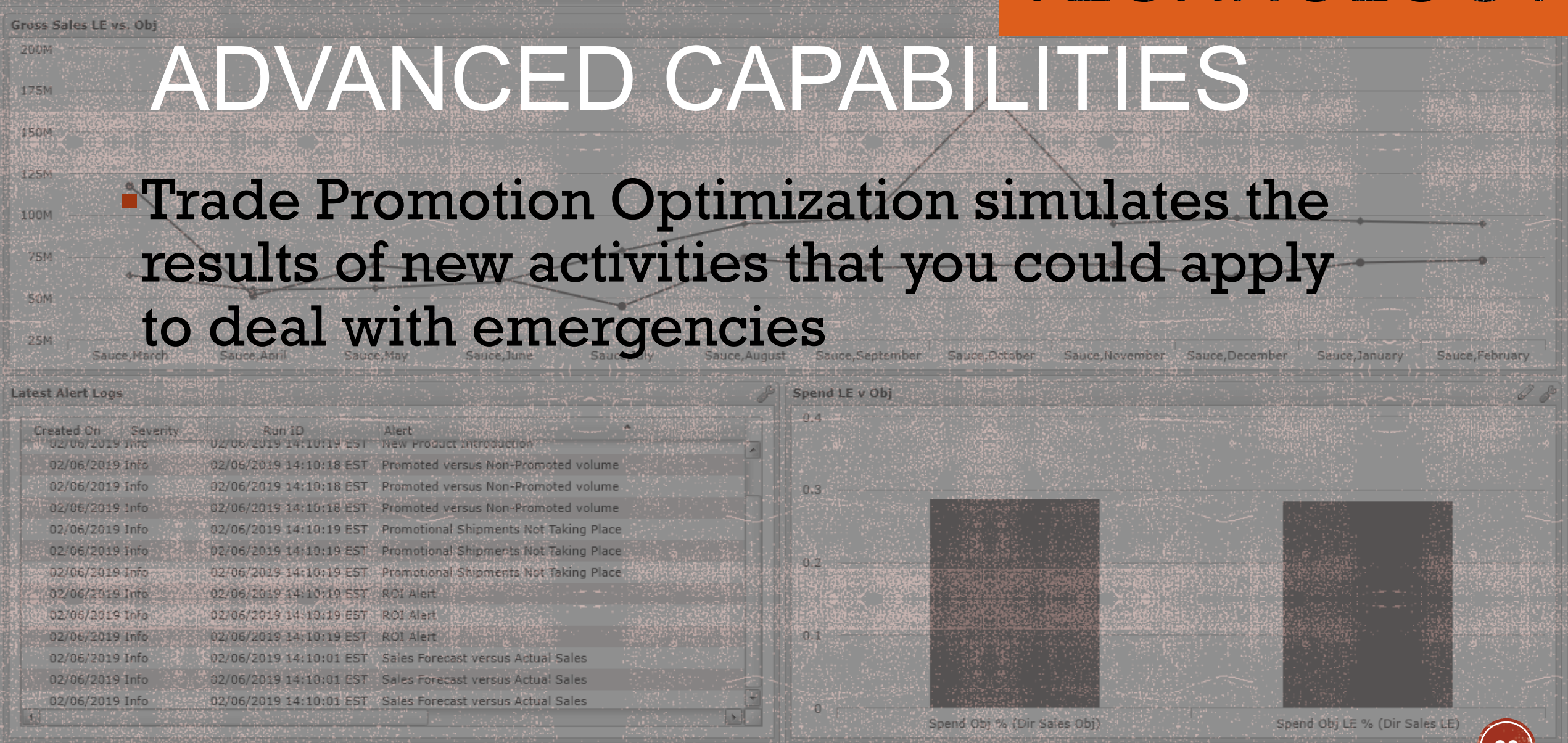
Alerts

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02/06/2019	Info	02/06/2019 14:10:19 EST	Promotional Shipments Not Taking Place
02/06/2019	Info	02/06/2019 14:10:19 EST	ROI Alert
02/06/2019	Info	02/06/2019 14:10:19 EST	ROI Alert
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02/06/2019	Info	02/06/2019 14:10:01 EST	Sales Forecast versus Actual Sales
02/06/2019	Info	02/06/2019 14:10:01 EST	Sales Forecast versus Actual Sales
02/06/2019	Info	02/06/2019 14:10:01 EST	Sales Forecast versus Actual Sales



ADVANCED CAPABILITIES

- Trade Promotion Optimization simulates the results of new activities that you could apply to deal with emergencies



REALIZE THE POWER PLANNING FOR TROUBLE

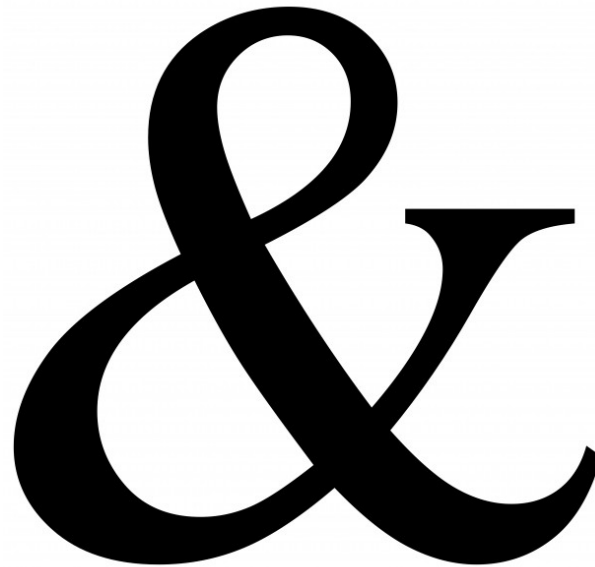
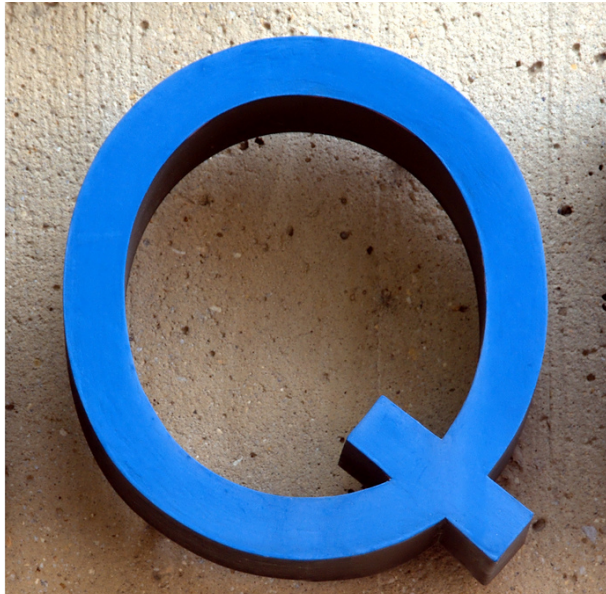
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 - ✓ EVALUATE PEOPLE, PROCESS AND STRATEGY
- ✓ BUILD BUSINESS PLAN TO DELIVER SALES TARGET
 - ✓ SET CONTINGENCIES AND DEDICATE RESOURCES
- ✓ PERSUADE CUSTOMERS TO BUY YOUR PRODUCTS
 - ✓ KNOW WHERE YOUR OPPORTUNITIES ARE
- ✓ SHOW YOUR CUSTOMERS HOW TO PRICE & PROMOTE

Know what
can go
wrong

Plan for what
will be done







PLANNING FOR SUCCESS

~~trouble~~

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