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An Enterprise Wide Solution to National Accounts Display Tracking and Execution

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An Enterprise Wide Solution to National Accounts Display Tracking and Execution

Noah D. Richards

Advisor: Mr. Craig Geiger

An Honors Thesis in Accordance of the Requirements for a Degree of “Bachelor of Science in Supply Chain Management and Marketing”

May 5th, 2023

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Introduction:

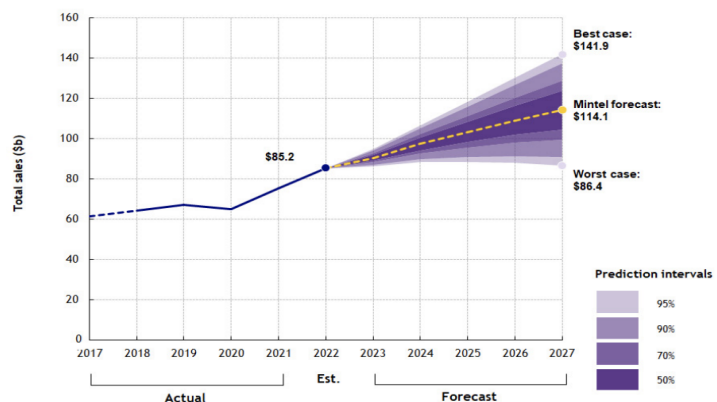
During the Most Recent Summer of 2022, I had the unique opportunity and privilege to participate in an Internship Program with Southern Glazer's Wine & Spirits (SGWS). Southern Glazer's is the leading Wine & Spirits Distributor in the US, as part of the Three Tier Beverage System (Supplier, Distributor, Customer, respectively). In this Internship, the title of my position was "National Accounts Strategy Analyst". In this Role, I was able to analyze and study company data, as it pertains to Off Premise and On Premise National Accounts. This includes Syndicated Data, such as IRI or Nielsen, as well as Data Visualization Programs such as Tableau. As part of my internship, I was tasked with two projects. As part of project 1, I Researched and Presented a 5 Year Category Review Audit to Identify the Short and Long Term Effects of COVID-19. As part of project 2, which my honors thesis focuses on, I Conducted a Universal Audit on National Accounts Display Execution Communication Systems and Presented Standardized Solutions. For this Project, I was assigned to work with an Undergraduate Student at Cornell University. With that said, I will first discuss the Background of this Display Execution Project and its importance as it pertains to retail business. I will then lay out initiatives and our eventual recommendations to SGWS from first hand research. Prior to that, I will discuss the many valuable business connections I established during this experience and the importance of them.

Background:

As mentioned in the "Introduction", Southern Glazer's Wine & Spirits is the leading Wine & Spirits Distributor in the US. Southern Glazer's is listed on Forbes as the 11th Largest Privately Owned Company. Southern Glazer's is assumed to sell 200 Billion Cases per year, for an eye catching \$25 Billion USD / year. These large numbers may come as a slight surprise, but after further research into Mintel Based Data, I can only further exaggerate the importance of Liquor Sales in the US.

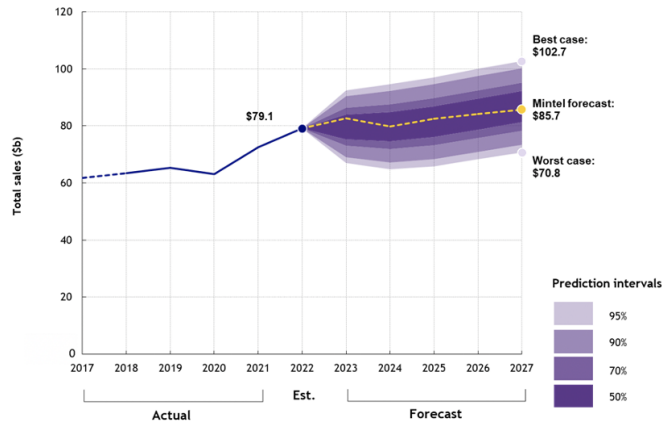
According to a 2022 Mintel Report on White Spirits, "Total spirit sales increased an estimated 39% from 2017 to 2022". And as far as the future, "Total spirit sales are projected to surpass \$100 billion by 2025, even in the face of economic uncertainty". Mintel even goes as far to project sales in 2027 (see figure 1 below), at a "best case scenario" of \$141.9 Billion. Note that these figures are based on On Premise and Off Premise Accounts, collectively. Mintel explains that the COVID-19 pandemic "increased engagement among spirit consumers" as consumers spent more time at home - and therefore more time drinking and upgrading personal bars. Mintel also adds that "as long as consumer retention and value perceptions remain in the forefront of brand strategy", the spirits market will continue to excel. According to Mintel, Vodka and Tequila are the category leaders of US Volume Sales (9 L Cases). Tequila specifically saw exponential growth during the peak times of the pandemic.

FIGURE 1: TOTAL US SALES AND FAN CHART FORECAST OF MARKET, AT CURRENT PRICES, 2017-27



Another 2022 Mintel Report, this report on Wine, projects a best case sales scenario of \$102.7 B by 2027. Similar to White Spirits, Wine saw exponential growth during the COVID-19 Pandemic. Mintel projects growth to continue in 2023, stating “innovation, alternative formats, and new taste experiences... will become true growth drivers” even as inflated prices adjust overtime.

Total US sales and fan chart forecast of wine, at current prices, 2017-27

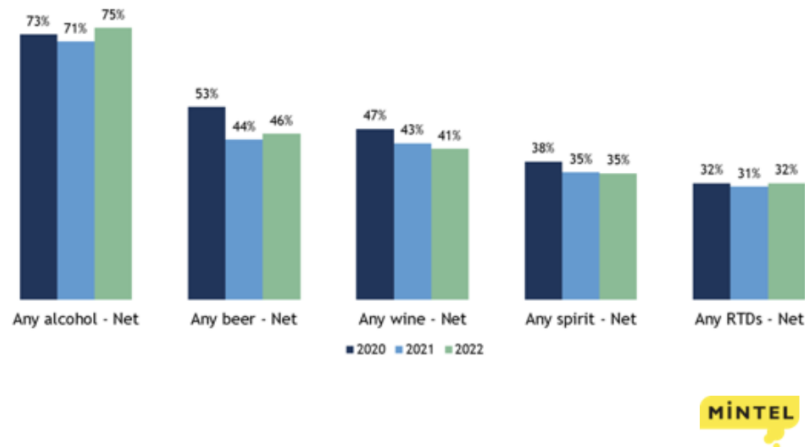


In addition to the first two featured Mintel Reports, I also examined a 2022 Mintel Report on Dark Spirits. Mintel explains that consumers have gained significant interest in Higher End Spirits and RTD cocktails. RTD cocktails are thought to propel the market even further as they “compete in consumption occasions distinct from traditional spirits and act as an entry point into the wider spirits market”. Similar to White Spirits and Wine, this Category is Projected Steady Growth for years to come (reference image 1 for overall Spirit Sale Projections). These 2022 Mintel Reports on Spirits and Wine provide a clear case for the vital importance of alcohol sales in the US. This Highly Inelastic Product will be purchased despite economic uncertainty, and even despite unusual circumstances such as the COVID-19 Pandemic. Wine & Spirit Products can be relied on to encourage consumer spending and overall national GDP as US Consumer goods.

The National Accounts Division in which I specifically was employed for, accounts for 1/3 of SGWS Revenue. National Accounts of SGWS is divided into two distinct groups: Off Premise and On Premise. Off Premise Accounts are locations where alcohol is purchased and consumed offsite. These include but are not limited to: Walmart, Target, Kroger, Publix, Walgreens, CVS, Albertsons, Total Wine, etc. The distribution and focus of these Off Premise accounts vary, depending on geographical location. For example, Publix Stores are located specifically in the Southeastern US, and Albertsons features most of their stores in California. State Laws for Liquor Sales also vary. e.g.) Walmart locations in the State of Arkansas do not sell Liquors such as Vodka, Tequila, Whiskey, etc, but rather just wine and RTD (ready to drink) canned beverages. On the contrary, Texas Walmart locations do indeed sell these beverages in stores. It is important to note that Off Premise Accounts combine for 80% of National Accounts Revenue, have bigger units, and 26 total accounts. Priorities of Off Premise Accounts include: Availability, Visibility, and Velocity. These are maintained through PODs (point of distribution), Planners, and Ads.

On Premise Accounts in contrast, are locations where alcohol is purchased and consumed on site. For example: Marriott, Darden Restaurants (Olive Garden, Longhorn Steakhouse, Red Lobster) , Brinker International (Chili's, On the Border). During the COVID-19 Pandemic, it certainly comes with no surprise

these locations suffered more than any. Loopholes were made, such as Texas Governor Greg Abbott allowing for liquor drive-thru and to-go services (not previously legal in the state of TX) to keep alcohol sales at these accounts somewhat on track. On Premise Accounts combine for the remaining 20% of National Accounts Revenue, have less units, but many more accounts in comparison to Off Premise with only 26.



Project Objectives:

With a Background of the Wholesale Beverage Industry provided, and a new familiarity of National Accounts, I will now discuss the objectives of this National Accounts Display Tracking and Execution Project. Objectives of this project can be broken down into two distinct groups: Project Based Objectives & Personal Based Objectives. The most important Project Based Objectives include:

1) Gain Retailer Knowledge in Order to Increase Business Success as Measured by Sales Results and Feature / Display Support

Consumers typically mind their own business and shop based on their normal preferences, sometimes being attracted to new products or products they hadn't planned to purchase, but rarely noticing the actual retail strategies that go behind these new / unplanned purchases. As an intern for Southern Glazer's, it became fully transparent that store strategies vary greatly. Each retailer is different from each other, and with purpose. For example, Target Stores offer a more "leisure" shopping experience and tend to be more condensed. Because of this leisure experience, prices may be more expensive in comparison to a retailer such as Walmart that has more open space (relatively less floor displays), but much more traffic. Both stores will feature displays and promotions, but Walmart will have greater price reductions and discounts. Retail Strategies also have similarities among stores. For example, milk and eggs tend to be "break even" products for retailers, and they are placed in the back of the store with the primary strategy of increasing foot traffic throughout the entire store. Store Strategies also include Space and Category Management. Space and Category Management relate to the layout of products within the store to increase value and appeal to consumers. Basic examples include cheaper wine being bottom shelf, with more premier wine on the top shelf. With that said, an important objective of this project was certainly increasing my personal familiarity and knowledge for retail strategies, and how each differs from one another.

2) Increase and Demonstrate Sufficient Product Knowledge to Better Strategize the Placement of these Products as well as Increase Overall Sales Results

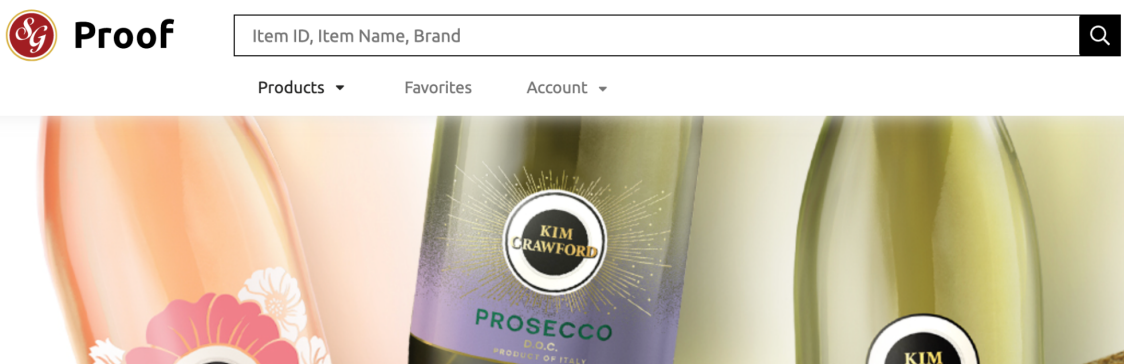
During this project and intern experience with Southern Glazer's Wine & Spirits, another important objective was increasing knowledge with company products. To be successful selling a product, it is of course important to know the portfolio of products offered. Southern Glazer's distributes thousands of products, so knowing every single name brand would be a challenge for any company employee. That said, an important objective for this project and the potential success in my career within the Spirits Industry was to learn as much as possible about the distributed products. I not only became familiar with top selling suppliers such as Tito's, Bacardi, High Noon, Fireball, and more, but also increased my knowledge on the size of these products offered, and where they come from. For example, Tito's (supplied from Austin, TX) is offered in many different sizes starting at: .50 ml, .100 ml, .200 ml, .375 ml, .750 ml, 1 L and 1.75 L. This is important because consumer preferences vary based on needs. During the COVID-19 Pandemic, there was a significant increase in the selling of 1.75 L containers because individuals and families were theoretically "stuck" at home and this helped allocate the amount of trips to the Liquor Store. Therefore this became a highly sought after size and has firmly kept its place within the Beverage Industry. Tito's offers their one original product, but in many different sizes to match changing consumer needs. Tito's is just one example of many products that I became more familiar with during this project.

3) Analysis of how Displays are Tracked and Communicated in Order to create a more Efficient Method of Reporting that was Embraced by the Organization

For this Display Tracking project to be examined in full capacity, it was vital to learn and use company software that enables display tracking and communication. This includes but is not limited to:

Proof

- An online shopping and account management site specifically for Southern Glazer's Products



Compass

- A platform with all recorded SGWS sales and depletions (units, dollars) for every product. This was especially important with my new formed familiarity with products and sizes for reference.

One Source

- A reporting hub that includes important shared company excel sheets, Tableau, Compass (as referenced above) among other company documents

Syndicated Data

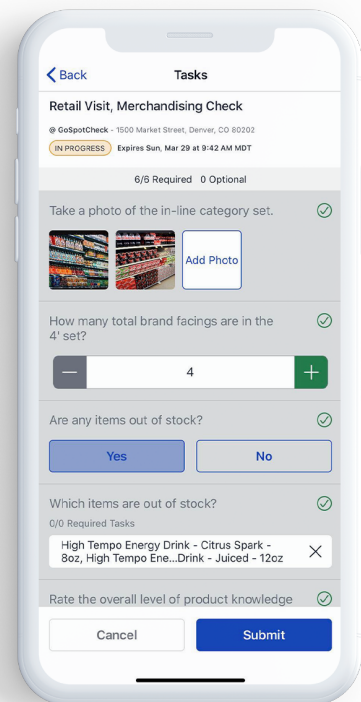
- IRI and Nielsen backed company data. Includes POS (point of sale) data and shopper data

Microsoft Office Suite

- Microsoft Outlook and Microsoft Excel are important sources for communication within display tracking. Outlook is the primary communication medium of the company and Excel is used to track completion Off Premise Accounts displays.

GoSpotCheck

- A platform that allows for uploading of pictures and videos to checkmark displays within retail stores and the locations within those stores. This platform was very important to communicate the successful completion or maintenance of an in store display.



4) Identify Future Segments within the Wholesale Liquor Business to Understand Growth Opportunities of the Organization

As every business should, Southern Glazer's is always looking for opportunities to grow their sales. In this intern project, I received a first hand look at possible and already taken opportunities. For example, Southern Glazer's has already made large strides and significant investments in the CBD sector of their distribution. Legality still remains an issue, but Southern Glazer's will be ready for full implementation when that time comes. Southern Glazer's is signed with 4/5 top cannabis distributors. Additionally, Southern Glazer's continues to seek new opportunities such as RTD (ready

to drink beverages). BuzzBallz and HighNoon are both new to market “ready to drink cocktails” that have seen large scale success and growth within the market.

With the Project Based Objectives firmly outlined, it is important for me to also touch on Personal Based Objectives. Those Personal Based Objectives are as follows:

1) Business Analysis Skills with Supported Data

An emphasized personal objective of this project was using data to support in business analysis skills. This was the first time I was assigned an authentic company project and the analysis and breakdown in my point of view was of great importance. With the support of data (Compass, IRI, Nielsen), different perspectives (company employees), retail store visits, breakdown of display strategies, etc, I was expected to form a thorough analysis of the current Display Tracking System and Communication Methods, and how it could improve.

2) Presentation Skills

My presentation skills were largely put to test for this Display Tracking Project. As an objective, it was understood I would be presenting (along with my intern peer) our recommended solutions for Display Tracking to the entire National Accounts Team (over 200 individuals) via Zoom. Besides the business analysis aspect of this project, I had to prepare and practice for a presentation about a very relevant topic to a largely sized group.

3) Teamwork Skills

As a third personal objective, with no less importance, teamwork skills were vital in successful completion of this project. As I have mentioned, I was assigned to work with an Undergraduate Student at Cornell University Student. We worked very well together and complemented each other's skills perfectly. Whereas she may have been more data driven and introverted, I was more hands on and extroverted. We communicated daily, spoke with many company employees, went on store visits, and presented together.

Project Initiatives:

With the Wholesale Liquor Business explained in terms of relevant importance to the economy, the background of Off and On Premise Accounts laid out, as well as the Project Based and Personal Based Objectives provided, I can begin to thoroughly discuss the details and initiatives for the project I was assigned. The task I was given consisted of completing a Review of National Accounts Display Tracking Systems. As previously mentioned, these National Accounts include, but are not limited to: Walmart, Target, Kroger, Publix, Walgreens, CVS, and Albertsons. Each one of these Off Premise Accounts have a different strategy, but all have similarities when it comes to in store displays and promotions. Therefore, finding a standardized, tracking based solution that all retailers could reference was the basis. The direct task of the project as outlined was to:

“Work with Commercial Sales VPs and Customer Development Directors to Conduct a Universal Audit of all Display Communication Tracking / Reporting to identify common themes, and in turn develop / propose a standardized format for the use of all”.

With this project assignment, it was also requested that we look at Display Communication Tracking and Reporting through three specific lenses:

- 1) Supplier Program Compliance
- 2) Customer Program Compliance
- 3) Southern Glazer’s Wine & Spirits Program Compliance

** As mentioned earlier, the WholeSale Adult Beverage industry is composed of a three tier system of Supplier, Distributor, and Customer.

Some recommendations before we began the project included:

- Define Terms / Vocab & Become Familiar with Products
- Identify Available Company Contacts
- Identify Lines of Communications between Business & Each Other
- Agree / Communicate on Cadence of Regular Meetings
- Uphold Standards of SGWS Employees
- Learn Template for Capturing Current Statements, Problem Statements, Strategy Statements

Displays to be Exclusively Looked at Included:

- Endcap
- Sidecap
- Floor Stack
- Check Lane
- Out of Category
- Action Alley
- 4 Way Fixtures



Software to Be Specifically Looked at:

- GoSpotCheck
- Compass
- Syndicated Data (Nielsen, IRI)
- Data Visualizations (Tableau, Power BI)
- Microsoft Outlook (communication)
- Zoom (communication)
- Microsoft Excel

Project Lead: Scott Moore*, Ryan Sass*

Data Lead: Traci Collins*

Project Recommendations:

With a background provided for the Adult Beverage Industry, as well as an explanation of the objectives and initiatives of this project, it is important to explain the results that were accomplished. Upon many discussions with National Account Directors specific to Stores (see “Networking Section”), a look into company resources and software (reference above), and multiple store visits, my project and I were able to come away with the following recommendations:

1.) Real, Time Based Updates

One problem we identified from looking into Southern Glazer’s National Accounts Display Execution and Reporting Systems was the lack of real, time based updates. Displays within certain stores may be accounted for and reported through company software or tools (such as GoSpotCheck), but the date of collection may be lacking. Accountability needs to be held for real, time based updates and this means a survey of each location’s displays as frequently as possible. We suggested that each of Southern Glazer’s National Accounts attempts to update display area, type of display, and execution of display (simply yes or no) twice a month. This can be documented in rotations based on time intervals of two weeks. During Seasonal Periods, National Accounts may look to make three separate reports of displays and the execution of them to avoid any miscommunication during peak sale opportunities. Communication should be provided via Microsoft Outlook and updates should be given via Zoom regularly. Data should be centralized within Microsoft Excel (recommendation 3). Speed is important in supporting sufficient display execution, and more frequent updates will help expedite this process with real time results.

2.) Continuation of GoSpotCheck Feature

As referenced above, GoSpotCheck should remain to be a fundamental tool in the system of reporting and tracking display execution. GoSpotCheck is a platform that allows for uploading pictures and videos to checkmark displays within retail stores, the types of displays, and the locations within those stores. This platform is very important in communicating the successful completion or maintenance of an in store display. In many discussions with National Account Advisors specific to stores, it was established as a clear theme that GoSpotCheck was used by the majority of our reporting team. Because of this, we suggest the continuation and mass implementation of this software for reporting.

3.) All Data in Central Location

An additional issue identified through Display Execution and Reporting was the lack of a central location for all National Accounts Data. National Account Advisors of Kroger aren't necessarily concerned about the National Account Advisors of Walmart, so accountability is difficult to fully execute. That said, it is beneficial for the company that all individuals work together and share reporting data. Reporting Data can be kept in a central location, specifically Microsoft Excel, for full transparency. My Project Peer and I created a mock Excel Sheet that contained a tab with each major National Account Retailer. Data from GoSpotCheck, such as display type, store location, location in store, and execution should be provided within Microsoft Excel. Additional items such as date provided, category (wine, spirits, etc) and amount of cases originally displayed should be listed. Keeping all National Accounts company data within a central location allows all individuals to be on the same page and have full transparency to their own data, as well as other retailers. This also allows the National Accounts team as a whole to view the percentage of displays being executed across all retailers.

The above recommendations were our top 3 observations and were presented to a team of 200+ National Account Professionals on a Zoom Call. I had the pleasure of facilitating the introduction and conclusion of the presentation, as well as discussing some of the topics suggested above.

Personal Takeaways:

As my three month internship came to a close in August 2022, aside from the personal objectives and project initiatives listed above, there are three beneficial takeaways from this experience with a corporate company:

1.) Experience in a Private Industry

The experience achieved from this Internship not only improved my knowledge of the company and its employees, but has created talking points and resume content for the rest of my career. It is valuable that as an Undergraduate College Student I am now able to discuss the multitude of concepts covered this previous Summer. It is just as valuable that as a young professional individual, I was able to fully adapt to a typical work schedule and hold myself to the expected standards of Southern Glazer's Wine & Spirits.

2.) Career and Company Interest Built

In addition to the experience of working in a corporate role in a private industry, this internship position provided confidence that Beverage Wholesale is a career I want to pursue. The demand is consistent, and these products will always have a place in the market. As referenced earlier, Beverage Wholesale continued to thrive despite the COVID-19 Pandemic. This is not only a safe industry to pursue, but one that is constantly growing and capitalizing on available opportunities. I was also able to decide for myself that Southern Glazer's as a company was a very desirable organization to become a part of. This is a relationship based, achievement based company, and I felt very comfortable and motivated during my experience. Southern Glazer's is just as prestigious as it is welcoming, ranked #11 on Forbes list of Privately Owned Companies and firmly takes the title of the largest Distributor of Alcoholic Beverage in the US. As referenced on the SGWS Website, Southern Glazer's holds themselves to commitments such as: Driving Change and Making Progress towards a more Diverse and Equitable hospitality industry, Supporting Education in the Community, Advocating for Alcohol Responsibility, Reducing Environmental Impact, and much more.

3.) Internal Networking

Throughout my internship with Southern Glazer's Wine & Spirits, I was provided exposure to a plethora of strong connections in the workplace. This ranges from VP positions within the office I reported to, all the way to National Account Representatives from major retail outlets such as Walmart, Target, Kroger, and more (see below). These connections are important for career purposes, and need to be approached intentionally and strategically built upon. Taking initiative in these relationships is important to myself. For instance, I was invited to participate in a Fantasy Football League with many Southern Glazer's Employees after my internship was completed. This may seem like a minor and almost silly detail, but it allowed me to stay in touch with high standing employees, keep my name in circulation of the company, and continue to learn about each individual. These connections, on top of the many others I have provided below, were names I was able to reference in my recent interview process with the company. These individuals I have networked with are therefore familiar with my personality and work ethic, and therefore are able to talk about my name in a positive and encouraging manner.

Networking:

Below is a list of some of the most influential individuals connected with this Past Summer throughout my internship and project experience. Individuals with asterisks may have been referenced earlier on:

- *Scott Moore, *SVP Natl Accounts Off Premise*
- *Traci Collins, Ryan Sass, Steve Zielonko *Natl Accounts Team, Dallas, TX*
- Chip Turissi, Nicole Carbone, Madison Penland *Internship / Recruiting Team*
- Scott Allen, *Customer Development, Space Intelligence, CA*
- *Ryan Sass, *Customer Development, TX*
- Larry Dick, *Director of Customer Development, TX*
- Sean Griffin, *VP of Regional Customer Development*
- Kariff Rhooms, *VP, New Ventures, CBD Sales & Distribution*
- Tonya Knox, *HR in Addison, TX Office*
- Paul Ratner, Arizona, Go Spot Check
- Stephanie Yaeger, Customer Development with Campari (supplier)
- Ryan Morrison, Space Management, Costco / Whole Foods
- Bryce Armstrong, Natl Accounts, Off Premise
- Carl D'Ambrose, Kroger Natl Accounts
- Frank Rich, Albertson's Natl Accounts
- Brian Bulles, CVS Natl Accounts
- Steve Aaron, Publix Natl Accounts
- Sara Klingson, Target Natl Accounts
- Brent Verneti, Walmart Natl Accounts



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Appendix

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2022 Mintel Report Wine Market Chartpg 4

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Proof Website Screenshot pg 6

Go Spot Check Modelpg 7

Basic Wine Displayspg 9

Natl Account Logos pg 12