

O₄ Executive White Paper

Winning at the Shelf

Next-generation software solutions for retail execution:
A new opportunity to seize competitive advantage.

May 2008

This White Paper, prepared by O₄ Corporation, offers insights into practical strategies being implemented by Consumer Products companies around the world to transform their field representatives into agents of business value development.



Sections

1	The right solution at just the right time	1
1.1	The retail landscape circa 2008	1
1.2	What the new world looks like	2
1.3	New solutions tilt the playing field	2
1.4	What is IFI and how does it happen?	3
2	How does this address key market factors?	4
2.1	Timely field observations change the game	4
2.2	Brands rely on this data to win 'Moments of Truth'	5
2.3	Consumer-centric stores demand better execution	7
2.4	Moments of Truth winners more effective in the field	8
2.5	Proven, cost-effective solutions put superior execution a fingertip away.	10
2.6	Executives see quick technology pay off	12
2.7	Companies build brand momentum globally	13
3	How CP leaders are applying the strategies	15
3.1	Whyte & Mackay penetrates the UK	15
3.2	Daisy Brand achieves new retail insights	15
3.3	Yakult prioritizes calls	15
3.4	Procter & Gamble standardizes mobile platform	15
3.5	Brown-Forman Australia influences sales	16
3.6	Spin Master increases field force effectiveness	16
3.7	SellAgence speeds up reporting and sheds costs	16
4	How quickly can you make the change?	17
4.1	Field new 'smart' strategies to win at the shelf	17

1 The right solution at just the right time

WHY READ THIS PAPER?

Technology advances come and go. But once in a while, new tools and smart thinking converge at exactly the right time, transforming how we do things in a way that makes progress very difficult to ignore.

This white paper highlights such an opportunity: the convergence of wireless, mobile technologies and proven software systems that together are changing the way Consumer Products (CP) companies manage their retail execution operations.

Forward-thinking companies, large and small, are quickly seizing this opportunity.

Beyond the obvious gains in efficiency (and reductions in cost), they recognize that these new solutions give them the ability to harvest rich information from the field – information that was previously unavailable.

Armed with new information (about, for example, verifiable in-store promotion compliance, store-level competitor discounting, shopper demographics in individual retail outlets, or the ‘real’ reasons for out of stocks) these companies can increase revenue, grow market share, and boost profitability steps ahead of industry norms.

Next-generation retail execution solutions are now in use every day, supporting winning field forces around the world. This paper explains why they represent an opportunity too good to be missed.

1.1 The retail landscape circa 2008

Barely ten years into the new millennium, Consumer Products (CP) companies find themselves travelling an unfamiliar road toward an uncertain destination.

Power continues to drain from traditional marketing mix strategies for building share and revenue. Supply chain technologies implemented over the past two decades are running at full throttle with little prospect of further step gains in efficiency. And low-cost producers in emerging markets fuel a growing line-up of new competitors.

Meanwhile, retailers are strapping themselves firmly into the driver’s seat, equipped with a 20% trade spend cushion and the GPS coordinates of private label manufacturers around the world.

Back home, time-poor consumers are living at high speed alongside a digital highway with multiple lanes of data flowing in all directions. In this environment, where time and information have themselves become fast moving consumable commodities, brand loyalty endures under threat.

To survive and prosper, brands must be ready to win when it matters – in that first moment of truth when a shopper enters a store or stands at the shelf ready to make a purchase. Success in this brief moment, repeated hundreds and thousands of times every day, rests on having the right product, in the right place, with the right price or the right promotion, at the right time.

For companies that get it right, the final link closes between the supply and demand chains, delivering the value promised by manufacturing and logistics optimization, trade spend programs, and brand marketing campaigns.

For companies that get it right consistently, the rewards stretch out into the future. They include reinforced brand loyalty from satisfied customers, stronger relationships with retailers, and less risk of being overtaken by the competition.

As more and more industry research is finding – winning at retail is a direct path to revenue growth, increased market share, and healthier profits.

1 The right solution at just the right time

1.2 What the new world looks like

When consumers reach for a product on the shelf, there can only be one winner. All the investment in market plans, advertising campaigns and trade promotions ends with this one moment of truth.

To win in store, in these last few steps of the sale, leading CP companies are racing to arm their field forces with next-generation software solutions. Small, smart and sharp, these solutions close the loop around planning, execution and outcomes.

Loaded with customer-specific information and driven by powerful business logic, they allow field representatives to operate more efficiently and more effectively.

Back at head-office, management has a complete day-to-day picture of field activity: which accounts are driving incremental revenue, which promotions are working, what new opportunities are available, and where the competition is winning or losing.

And, for the first time, managers and decision makers can access critical field intelligence to forecast more accurately for battles to come.

1.3 New solutions tilt the playing field

Smart software solutions, enabled by advances in mobile technology, are transforming field execution for the world's leading CP companies.

These companies are leading a revolution on the selling floor with their ability to create the perfect store, the perfect shelf, the perfect order.

They are already achieving results across the range of consumer product sectors – from centralized retailers in the United States, to high-end hotel bars in the United Kingdom, to independent merchants in Australia, and to local shops in emerging markets.

The range of products is no less diverse – from packaged consumables to perishables, alcoholic beverages, household needs, over the counter health products, and consumer electronics.

Consumer Product companies that take responsibility for the supply chain all the way to the retail shelf can see a 2% to 15% improvement in sales.

LORA CECERE, AMR RESEARCH

1 The right solution at just the right time

INSTANT FIELD INTELLIGENCE

Instant Field Intelligence (IFI) refers to the harvesting and transmission back to head office of real-world data from the field.

IFI adds a vivid new layer of intelligence that helps explain data gathered from traditional sources, (e.g. scan and transactional data).

Because information is 'real' (i.e. based on direct observation), is available immediately, and can be routed to managers across the business, it allows for quick remedial action in the short-term and better longer-term planning.

For example, it helps companies:

- quickly remedy out-of-stocks during promotional cycles
- match product supply to precise local demand
- investigate causal factors for atypical new product metrics
- respond rapidly to high-priority service requests

It also answers vexing questions:

- Is a retailer complying with promotion POS display?
- Does the category planogram have holes?
- Are items incorrectly priced?
- Did a delivery go astray, or are goods in the backroom? Are they damaged?
- Is a store manager in-step with a chain HQ directive?
- Is freshness an issue?

IFI is everything brand managers did not know before – it is the direct link between in-store conditions and actual brand outcomes in specific stores.

With this intelligence, brands are more effective at the shelf because head-office is in the instant-connect loop, and representatives are more efficient in their tasks. This is fast becoming the great differentiator for brands and an immediate priority for suppliers.

Top executives increasingly favor this field empowerment—and this white paper covers the dominant retail, consumer and technology trends that drive their thinking and make IFI so pivotal to success.

1.4 What is IFI and how does it happen?

Brand representatives and distributors observe and report on shelf conditions, store compliance, competitors' activities, local consumer preferences, anything they're tasked to observe. They transmit directly and immediately via mobile devices to headquarters (think category managers, trade promotion managers, finance and logistics). With these instant-connect views, business managers can intelligently and swiftly reorder field priorities to energize a launch, avoid a supply disaster, magnify an opportunity, or blunt a new product test by a competitor.

Beyond that, representatives themselves readily access each item's sell-through history in each store on their mobile devices. They use this data to help store managers interpret what's happening on their own shelves, and show by past performance, trends in their area or in similar demographic areas, why the brands they represent deserve more space.

Representatives are able to focus on strategically meaningful activities, rather than robotic checklists each day. They are more proactive than ever, they bring more value to store managers and build grassroots support for brands—all of which augments the carefully built relationships between CP account teams and retail buyers.

This sets the stage for brand superiority at the shelf.

2 How does this address key market factors?

KEY FACTORS IN THE MARKET

- #1 Brand position at the shelf is continually at risk—from seasonal cycles, store labor cutbacks, category resets, store acquisitions and more that stress retail operations.
- #2 CP spends heavily on trade promotions, but lack store-specific insights that explain success or failure.
- #3 Out-of-stocks continue to be brand killers, and causal information remains unclear.
- #4 Retailers have the leverage – they reward the brands that do the most for them.
- #5 Private label is gaining – competing for shelf space, consumer spend and loyalty, while squeezing margins.
- #6 High staff turnover at retailers and CP companies necessitates electronic corporate memory.
- #7 Consumers shop and receive brand messages differently today. Frequent yet shorter visits are routine and a new media matrix applies.
- #8 New performance and execution demands will evolve for brands in the marketplace as retailers amass more strength.

2.1 Timely field observations change the game

The time-is-money adage is rarely as true as in retail, where planning and strategies establish a platform for brand success—and achieve it only with speedy and smart field execution.

Yet execution has lagged for decades, for many reasons beyond the control of CP suppliers. Despite their best efforts, suppliers send carefully designed brand strategies, category planograms, trade promotions and special events to the field—and succeed less than they'd like.

One reason: Store merchandisers complete tasks, yet typically lack the insights or authority to immediately take charge and remedy hurtful conditions they observe at the shelf. Brand representatives usually lack a fast, proven, secure way to communicate shelf issues to headquarters that allows CP brand, category, promotion and account managers to help enforce a retailer's compliance with costly brand programs.

This devastates ROI on brand spend. Most vulnerable to waste when products aren't where they ought to be: the 20% of sales that CP suppliers spend on trade promotions, and the massive efforts to innovate brands and capitalize on category opportunities.

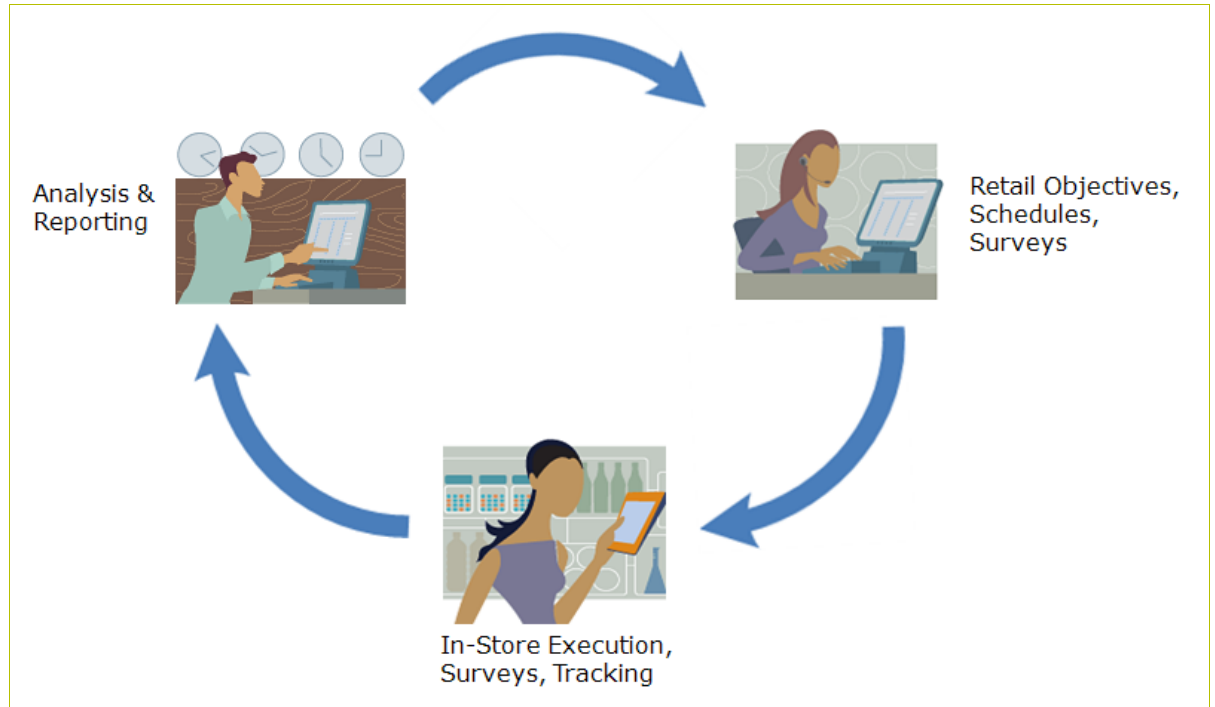
A far better approach: Earn brand command at the shelf.

The use of 'smart' solutions uncovers critical data never seen as richly by field forces, headquarters or store managers. This is key to more positive strategic outcomes for brands, and the rewards include higher revenue and profit margins, rises in market share, better customer service and satisfied shoppers.

CP leaders and niche brands across the globe are taking greater control of their brand destinies and turning their field forces into agents of business value development. It matters little if representatives work directly for the CP manufacturer, a broker, distributor or other intermediary. They hold insights in their hands, on mobile devices, that enhance their role to intervene promptly on behalf of brands.

First, they have histories of how specific brands have sold through in specific stores during specific events at specific times, so they can accurately predict a store's next steps for success, and persuasively engage department or store managers. Second, representatives wirelessly communicate current shelf conditions to headquarters strategists when they need to be involved, so the CP supplier works more seamlessly with instant-connect insights.

Workflow process with optimized retail execution



Instant field intelligence transfers real world data back to head office, enabling quick and informed decision making and answers to explain cause and effect. The true value of IFI is acquired when the loop is closed and the actions of field representatives can be adjusted as necessary.

This concept of Instant Field Intelligence (IFI) changes the game for brands—with speed, data, insights, and other brand-integrity protections. It allows CP to better enforce retail compliance with high-cost programs, to fill the supply chain precisely as needed, and keep manufacturer strategies and retailer objectives on course.

2.2 Brands rely on this data to win ‘Moments of Truth’

The First Moment of Truth is what Procter & Gamble named the consumer-brand encounter at the shelf. Many factors lead to a purchase selection—product design, innovation, price and more—but clearly not if the product is missing.

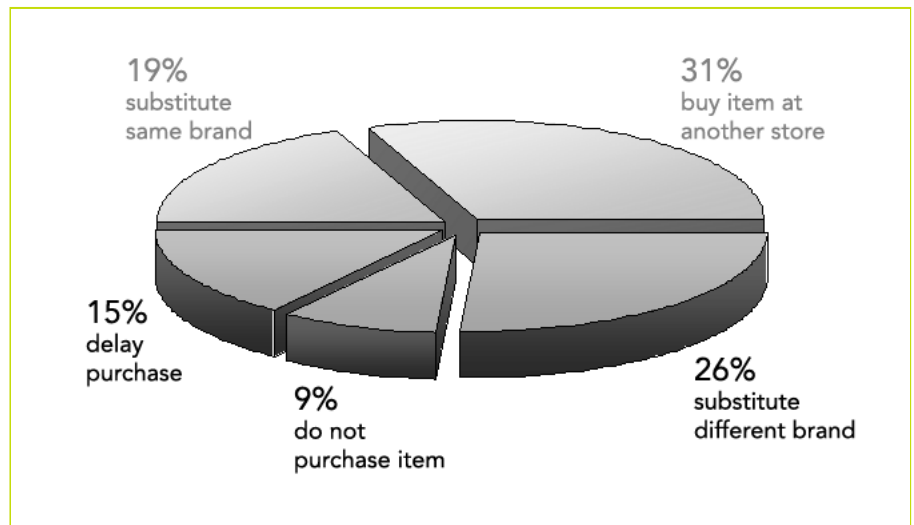
Yet product presence is not a given. Shelf presentation is so critical that it either drives purchases or drives people away. Today, planogram compliance hovers at around 60%—due to the complexity of more than 100 category planograms per store, and the diversity of store size, with some individual chains ranging as widely as 4,000 to

2 How does this address key market factors?



80,000+ square feet.¹ One undesirable outcome is out-of-stocks that bedevil everyday sales and promotional events.

Average shopper response to out-of-stocks



The impact of out of stocks is disastrous for both the CP supplier and the retailer. CP companies stand to lose an average of 35% of intended purchases and retailers an average of 40%.²

Store-level execution is the last leg in an exhaustive process to give consumers what they want, when they want it, at a price they're willing to pay. While perpetually viewed as the weak link in category management, CP leaders today are perfecting the match between supply and demand, down to the individual store level, and taking the necessary steps to optimize brand placement and performance.

They acquire proof of execution excellence when they link field activities to volumetric sales, and check against consumer panel data to confirm that people they thought would buy in specific stores actually did.

Their innovative use of mobile technology in the field empowers them to overcome historic challenges to store execution. On the consumer goods side, lack of cohesion between disciplines disrupts supply. (Category managers and brand managers want to see aggregate data, while account managers and supply chain managers need to focus on individual stores.) What a great competitive advantage it is when they

¹ Source: Consumer-Centric Category Management: How to Increase Profits by Managing Categories Based on Consumer Needs, Nielsen/Wiley, 2006.

² Source: Gruen, Corsten, Bharadwaj (2002) "Retail Out-of-Stocks"

2 How does this address key market factors?

PROMOTIONS: THE TRUTH

With trade promotion spend averaging 15% to 20% of revenue, it pays to know what works and what does not.

In most cases, there is not enough unambiguous data to demonstrate the real value of one promotion over another. Historical and transactional information – from enterprise systems and syndicated scan data – cannot tell you what is really happening in the field.

Information captured by field reps, in real-time at the point of consumer decision – at the shelf, bar, fridge or floor – gets you much closer to the truth. It can give you greater certainty in your planning (and in your negotiations) by answering the questions that impact on every promotion:

- Was the product placed correctly?
- Were POS materials in place?
- Did the display comply with agreed planograms?
- Did out of stocks undermine sales results?
- Did the promotion suit the outlet demographics?
- Was promotion pricing correctly displayed?
- Was competitor activity an issue?

With the right tools, reps can capture these metrics and feed them back into the review and planning process to provide a clearer picture of promotion performance.

can reconcile their views to reach a common understanding of what is happening with their brands. That's a new 'smart' approach.

On the retailer side, chain acquisitions and consolidation unduly stress operational systems; on a more local level, periodic store, category and seasonal resets create peak labor needs, often when lower labor budgets and high staff turnover make it harder to provide.

Brands and stores have perennially struggled with this. Yet category management has become more consumer-centric—to reflect shopper demands, purchase patterns, lifestyles, time constraints and multiple missions—and that raises the bar for store-level execution. .

2.3 Consumer-centric stores demand better execution

Retailers that invest heavily to maintain their high-value customers have a low tolerance of poor execution by CP suppliers and distributors. They expect increasing granularity: a bean supplier needs gourmet varieties in the deli aisle and small pack sizes in urban singles markets to match demand.

Chains also want brands to help them capitalize on trends. Not long ago, a major supplier of carbonated beverages, energy drinks, teas and waters helped drug chains exploit beverage opportunities with a mix of keen insights on drinking occasions throughout the day, high-impulse displays and coolers, and cross-merchandising strategies. Today, Dyson reaches wellness-driven consumers who are willing to pay more for home-cleaning technology they feel is superior and will help keep their home environments clean and healthful.

As retailers worldwide take pro-environment stances and add wellness sections to stores, brands that align with these efforts will enhance their positions. The emergence of walk-in health clinics (nearly 1,000 in the U.S.), staffed by nurses and located by pharmacy, opens the door to inventive OTC merchandising that could grow categories and brands. Which suppliers will step up with the field resources to deliver?

On this point, it probably matters little if a CP company serves as a category captain or validator, or has a lesser role with a chain. Brands gain and lose their positions each year through performance; it takes consistent reliability to build a retailer's loyalty to a supplier. Superior in-store execution is a meaningful differentiator to retailers, it makes store managers look effective, and it enhances brand integrity in consumers' eyes.

2 How does this address key market factors?

2.4 Moments of Truth winners more effective in the field

These companies manage the supply chain better and optimize shelf presentations. Their outcome: greater brand awareness and share, category growth and consumer loyalty.

The efficiency gains from smart retail execution solutions are a given: speedier store visits and more calls in a day, thanks to less paperwork and administration time; account continuity thanks to corporate memory of a brand's history with a retailer, down to specific item and store levels; more seamless brand management from this single source of unified data and faster information flow.

All fine, but better execution today goes far beyond these gains. Brands that are more effective in the field because of Instant Field Intelligence (IFI) enjoy real competitive advantage.

Advantages delivered with optimized retail execution

Increase revenue	increase customer-facing time and productive field activity
Reduce operating costs	eliminate paper, postage, data entry expenses
Accelerate speed of information flow	eliminate duplication of effort, manual data collection and reporting
Improve visibility of field activities	receive information throughout the day
Standardize field processes	implement defined processes within the solution
Make field reps more effective	access up to date information from enterprise computer systems
Enhance communication with field force	increase speed, accessibility, timeliness of communication
Improve reporting and analysis	analyze time and motion, increase field force accountability

Direct cost savings from field efficiencies and reduced administration, combined with recurring ROI from increased retail effectiveness, more timely information and retailer compliance are typical benefits.

Suppliers become more effective at the shelf because they're able to act on new information they never had before: a near real-time view of what is happening with brands at the shelf during promotional events

2 How does this address key market factors?



and in everyday planograms. Mobile devices are compliance tools that help CP companies avert sub-par results: Your product on a two-for-one promotion isn't on the shelf. Is it because a competitor offered three-for-one and took the space? Do you see a pattern from other similar stores in the region?

Or in advance of a promotion, headquarters could have field representatives survey Wal-Mart stores in the Northeastern U.S. to ensure that store managers are aware, have the stock on hand, and will display as agreed.

Taking another view, a representative might spot a competitor's new item in test market and seek quick directives on what to do to blunt its impact and skew data.

Without the right tools to monitor in-store execution it's impossible for CP companies to be sure they are getting it right.

It's all about winning at the shelf. And demonstrating brand leadership that helps retailers to succeed despite their operational challenges. This builds equity.

As CP companies are getting control of their trade spend they are turning their attention towards in-store execution. However, without the right tools to monitor in-store execution it's impossible for CP companies to be sure they are getting it right.

Old technology merely tracked time and mileage, so brokers could know what to invoice the CP manufacturer.

By contrast, new mobile tools close the final link between demand and supply chain, as information flows both ways between field and headquarters.

- First, POS data pulled at night goes through a series of business rules on the system to prioritize next-day activities for the field rep.
- Second, a representative who sees a supply gap in a store has the system take him through resolution activities (check the backroom, see the department or store manager, and so on); this is known as branching logic.
- Third, with analytical tools and charting on the device screen, a representative can persuade a non-complying store manager that he'll sell more in a category if he abides by the retail headquarters-mandated program.

2 How does this address key market factors?



- Fourth, with the ability to predict where out-of-stocks might occur next week, based on analysis of sales and field conditions, CP suppliers and their brokers can deploy resources to avoid that condition. This is far more productive than damage control after an out-of-stock occurs.

One example: 85% of P&G's Wella sales representatives to professional stores in Australia and New Zealand were former hairdressers, and 65% lacked direct computer experience. Results after the first month of handheld solution deployment: 50% increase in electronic orders placed in Australia and 15% in New Zealand and a 20% climb in order value growth. In addition time spent by sales representatives on paperwork was reduced by three hours per week.

P&G has recently given retail representatives the tools to allow them to effectively plan their visits, execute their in-store audits, and analyze their performance. P&G management electronically distributes field activities and accesses results in real-time.

CP suppliers to the United Kingdom with GPS technology in their mobile devices use it to minimize drive time between stores. This use suits the market because abundant cameras feed real-time traffic conditions to the units (via the Internet) and then quickest drive-time routes taken.

2.5 Proven, cost-effective solutions put superior execution a fingertip away.

There is no early-adopter risk with these mobile tools, which have been used by select CP companies in various forms for a decade. These next generation solutions bring extreme competitive advantage, and are available for worldwide adoption now.

The initial capabilities of the tools were ahead of their time. Today, ten years later—after diverse applications, rigorous field tests and refinement into solutions specifically for the consumer products marketplace—these tools are more sophisticated, and a perfect fit for unrelenting retail demands.

2 How does this address key market factors?



Also appealing; because end-users can configure surveys and reports without having to go to IT for assistance, IT can keep its focus on high-value deliverables to the CP organization. For manufacturers selling globally, hand-held devices adapt easily to local cultures, languages, currencies and geographies, and help differentiate brands in a very manageable way.

Sales force automation (SFA) solutions are critical because of the amount of time and resources associated with executing with retailers. Investment in SFA solutions continues to be steady, but primarily among consumables companies (such as food and beverage), with considerably less among semi durable companies (such as apparel and footwear and entertainment), and still less among durable companies (such as housewares, appliances and consumer electronics). This continues to be a surprise, since the economy is strong in all sectors and manufacturers continue to invest more than 20% of annual revenue on trade promotions, which is a component of SFA functionality.³

However, the maturity of hand-held technologies, combined with the greater speed of wireless communications, is a virtuous coincidence that makes the deployment of these next generation retail execution solutions perfectly feasible—indeed essential to produce the perfect store, the perfect shelf, the perfect order.

CP suppliers go live with mobile within weeks and months, not years, as large enterprise systems often require. No disturbing visions of 5 years and \$20 million spent before bearing any fruit, the mobilization across a CP infrastructure is comparatively quick, productive and requires few resources from IT.

Companies are typically able to pay for the mobile technology investment within 12 months through efficiency gains alone.

At best, the upside is monumental: Instant Field Intelligence (IFI) used by suppliers to mine the store in new and powerful ways realizes brand potential that is as great as the imagination and energy of the CP team.

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³ Source: Dale Hagemeyer, Gartner, "MarketScope for Sales Force Automation in the Consumer Goods Industry, 2nd Half 2007," November 16, 2007.

If C-suite executives think of this next-generation technology as a clean response to business issues in the field, they might well follow the path of CP innovators such as Procter & Gamble, Dyson, Wella and other companies large and small reaping competitive advantage today.

2.6 Executives see quick technology pay off

When senior managers at CP suppliers think of where to invest in their brands, they realize the payoff in better in-store execution is both immediate (sales volume and profit lifts) and long-term (more credibility with chains up and down the management ladder). The added twist: Instant Field Intelligence (IFI) makes brand reps more proactive and predictive, and able to build grassroots store manager support for their brands.

These initiatives aren't only about the profit of the day. Brands and retailers that execute well in-store satisfy consumers consistently, and feed them confidence to keep coming back to buy their preferred brands—yours! C-suite executives who think in terms of consumer lifetime value can appreciate the full payback of these efforts.

Compare that spend with two other considerable expenses, both with indefinite payoffs: the 20% of sales that go to trade promotions, or efforts to innovate products or packaging. Certainly Dyson has built a cult around design. And Gillette has innovated to set its shaving systems apart. However, most suppliers lack the resources or perseverance to see similar efforts through. Even then, a category innovation is not a sure winner.

When CP suppliers ask, “Where can I excel?” the answer is increasingly a new, practical solution that’s available now: better in-store execution, made possible by powerful technologies extensively field-tested in consumer products markets. This is a rare opportunity to make a real competitive difference.

The advantage of improved retail execution enables CP companies to use the field team in new ways to achieve the greatest impact. For example, during peak promotional periods field representatives can be sent to where they can be the most effective. Relevant data including past call history can be downloaded to a representative’s handheld device so they can hit the ground running. Head office may implement objective-driven workflow processes that focus representatives on high-value retail activities.

For management located within the four walls at head office the intelligence that is captured from the field proves invaluable. With data

THE GLOBAL FIELD FORCE

Improved operational efficiencies and cost containment are key drivers of profitable growth. By deploying standardized global retail execution solutions CP companies are finding it's possible to achieve both objectives.

Operational Efficiencies

- implement best practice processes across geographic regions
- accommodate different languages, cultures and local needs
- consolidate global reporting for better decision making

Cost Containment

- implement multiple versions from one technology platform
- automatically translate PDA screens into different languages
- rollout systems in developing markets at low incremental cost

uploaded almost real-time to head office from the field managers are continuously being fed field observations. If there are indications of a problem in store with promotions, stock-levels, competitor activity, etc, then remedial action can be taken quickly and decisively.

2.7 Companies build brand momentum globally

CG companies that evaluate their go-to-market practices internationally realize there is little consistency across cultures, languages, currencies and geographies. Distinct circumstances in each nation dictate how CP companies set brand priorities, track and measures results, deploy field forces.

Fortunately however, the next-generation technology is adaptable to these differences, and can be customized to the individual preferences of users in the field, so usage rates approach 100%.

The retail execution solutions enable a smart, proactive style of global commerce that enforces Best Practices and strategies around the globe. Simply, it gives CP companies the central control it needs. Mobile integrates with practically any back-end system at headquarters, across languages and currencies, to roll up performance reports consistently for management.

These real-time views of retail conditions help management set appropriate objectives, and align the CP organization on what it will take to succeed with brands and specific events. Consider how this works in:

Modern Trade

In the U.S., Canada and progressive Western European nations, execution is a strategic must for brands and centrally run retailers, who often share POS data each night. Brands that can analyze this data against item sales history, inventory on hand, pricing and promotional conditions, can project the perfect order. Mobile is also an ideal technology to build compliance on trade promotions, especially when reps go to stores to help prepare and stage events.

Eastern Europe, Portugal, Spain and Italy

More laissez-faire here, brand reps and distributors can truly influence stores to cut in new items, add facings, stage promotional displays and more, as long as they have the persuasive case in hand. Store managers are often autonomous even when stores are part of chains, so rep relationships are key, and are improved by real-time data on mobile devices.

2 How does this address key market factors?



Emerging Markets (India, Brazil, China and more)

Many thousands of CP brand reps and distributors dedicated to specific brands cover high-frequency retailers in these markets. Field staff typically walk, bike or motorbike down dusty roads to call on about 100 merchants a day (small bodegas, counters, stalls) and fill about 40 tiny orders a day, on the scale of cigarette sticks rather than packs or a few bars of soap. They write the orders, hand over goods from a basket they carry, and collect cash. By reporting manual transactions on mobile devices, CG can better understand grassroots sales, build rep efficiency and limit the potential mismanagement of cash. Hand-held units that suit here are inexpensive cell phones rather than PDAs. Mobile technology institutionalizes brands and ensures their proper representation.

3 How CP leaders are applying the strategies



3.1 Whyte & Mackay penetrates the UK

A global spirits company with a prestigious portfolio of brands Whyte & Mackay decided to bring a new in-house field sales team on board in the UK and that an intelligent mobile solution was an essential tool for the team. At the end of each sales call the sales reps synchronize their handheld device which enables the company to respond immediately to low stocks, competitor activity or successful promotions. The system also enables sophisticated market analysis, such as the ability to identify all the accounts that are stocking a given brand or category, meaning Whyte and Mackay can plan and flex the optimum range and promotions.



3.2 Daisy Brand achieves new retail insights

Daisy Brand, a sour cream maker whose independent sales force is deployed across the United States, has been able to significantly reduce the administrative time needed for each sales call and with a 360 degree view of the market Daisy Brand now has insights that make it possible for management to effectively evaluate retail execution and gain more shelf space.



3.3 Yakult prioritizes calls

Yakult, a maker of chilled probiotic beverages, has achieved absolute flexibility in territory management with the ability to abolish fixed territories and instigate floating territories with no set boundaries. Yakult can readily differentiate well-performing stores and those that need to be visited so each week the sales force's territories shift to ensure workload is appropriately apportioned and mileage reduced.



3.4 Procter & Gamble standardizes mobile platform

Procter & Gamble is implementing next generation mobile technology to maximize productivity of its retail operations worldwide. It has already deployed in Poland, Portugal, Canada and Australia, and will roll it out next in parts of the U.S., Western Europe and Latin America. The software enables P&G to operate across multiple geographies, languages, and cultures, with support for multiple data formats, languages, and scripts, including multi-byte characters and seamless integration with existing systems.



3.5 Brown-Forman Australia influences sales

Brown-Forman Australia is one of Australia's largest alcoholic beverages distributors. With access to inventory data on their handheld device in field Account Managers can be certain that when a customer places an order for a high demand, low-supply product that the order can be delivered in full. In addition, access to historical information at the point of customer contact enables Account Managers to show store managers the purchasing patterns of neighboring stores and use this information to influence the buying decision.



3.6 Spin Master increases field force effectiveness

Leading multi-category children's entertainment company Spin Master is using field optimization software to share data across all levels of the organization, increasing the speed and accuracy of information flowing between the Retail Operations Team and Head Office and to manage growth across all markets.



3.7 SellAgence speeds up reporting and sheds costs

SellAgence Limited, the representative for a number of high-profile global brands in New Zealand, shed its paper-based processes in favor of robust mobile technology. Its field-sales reps are more productive, getting new tasks and messages before each store visit, and more analytical at headquarters, with immediate access to data from each store visit. SellAgence also projects savings of 80% per annum in printing costs and 30%-40% per month on cell phone charges.

4 How quickly can you make the change?

4.1 Field new 'smart' strategies to win at the shelf

Execution excellence is the new brand equity. Top executives who've embraced this thought are already succeeding internationally in innovative ways.

Mobile technology opens new doors for CP companies of every size and kind—in brand performance at the shelf, in enhanced relationships with retailers, and in greater shareholder value.

Instant Field Intelligence (IFI) gives brand representatives and supplier headquarters a near 'real-time' view of what's happening in stores. Actionable data generate better planning and immediate, purposeful responses to critical and routine situations that arise in stores. So many market forces can undo consumer brand loyalty, and IFI acts as guardian of the brand.

Suppliers use mobile on a near 'real-time,' fact-based basis to set brand representatives apart in the eyes of retailers. New brand rewards emanate from data analyzed where the action is: better compliance, results, collaboration and consumer satisfaction.

Moreover, mobile allows CP brands to connect globally and operate locally, to instill field execution standards worldwide while adapting to local cultures, currencies, languages and geographies. The upside for brands is limited only by the imagination and energy of the supplier teams.

Isn't it time to explore higher-level field execution on behalf of your brands?



O₄ Corporation

Since 1998, O₄ Corporation has helped Consumer Products companies win at retail with advanced software solutions that transform business performance in the field.

O₄'s feature-rich mobile applications use smart technology to integrate seamlessly with intelligent in-office management components, automating day-to-day operations, optimizing in-store effectiveness, and accelerating information velocity to and from the field.

For more information visit www.o4corporation.com

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